We are currently updating our site; thank you for your patience.

SALES

CUSTOMERS – DEACTIVATE CUSTOMER

Customers can only be deactivated if the customer does not have contracts, open part requests, return requests, internal assets issued against them; unprocessed credit notes (sales and contracts), unprocessed invoices, sales orders, quotes, purchase requisitions and purchase orders.

Deleting a Customer will change the status for the Customer to **(I) Inactive**. If BPO is integrated with Evolution, the customer will show as **On Hold=1**.

Ribbon Select **Sales > Customers**
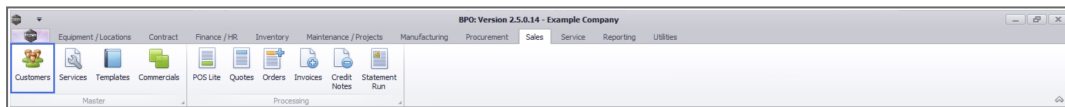
The **Customer Listing** screen will be displayed.

Select the Site

Your employee user record should be linked to a default site. In this case, the site will auto populate with this default, otherwise the site must be manually selected.

Another site can be selected, if required, and if you have the security rights to access the site.

If **All Sites** displays here, then you do not have a default site configured on your user record, and need to select the required site.
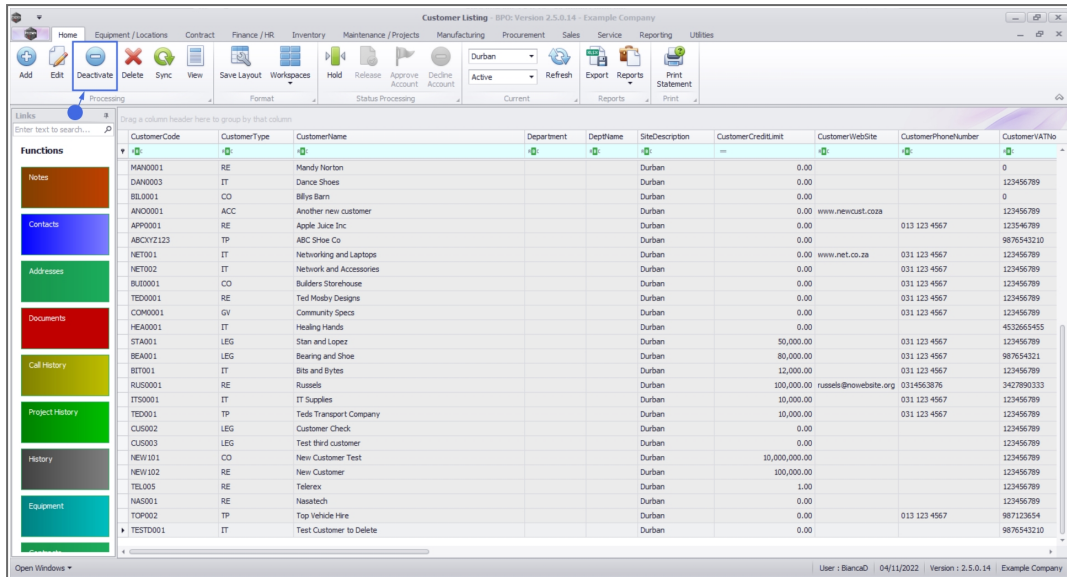
Upon opening, this screen will default to the **Active** status, listing all the **Active** contracts for the selected site.

- Select the **row** of the **customer** that you wish to process.

- Click on the **Deactivate** button.

A message box will come up, asking: **Are you sure you want to inactivate this customer, code [customer code]?**

- Click on the **Yes** button.
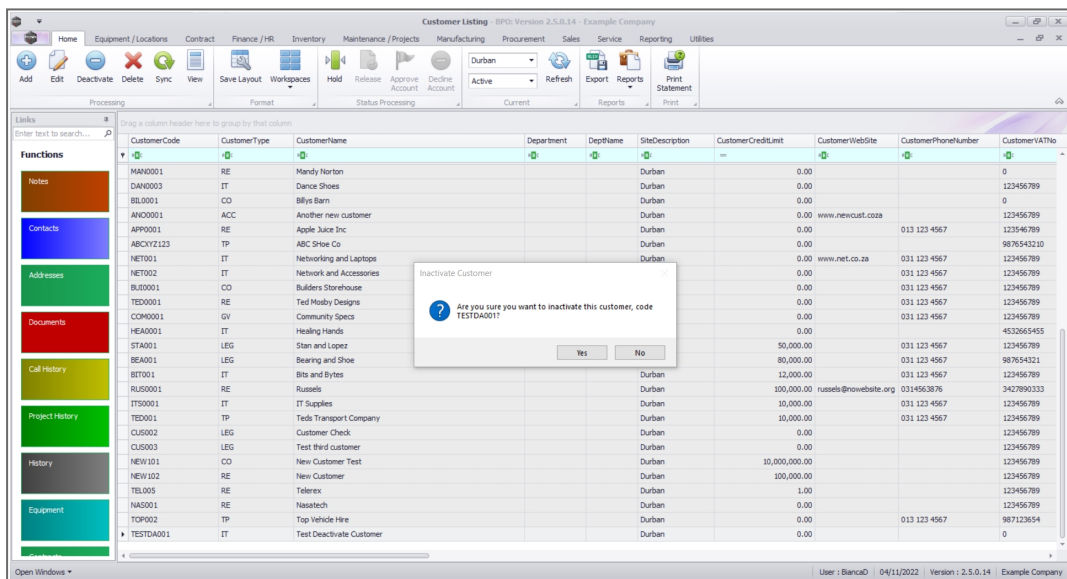
The will be inactivated and can be found by selecting the **Inactive** status.

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