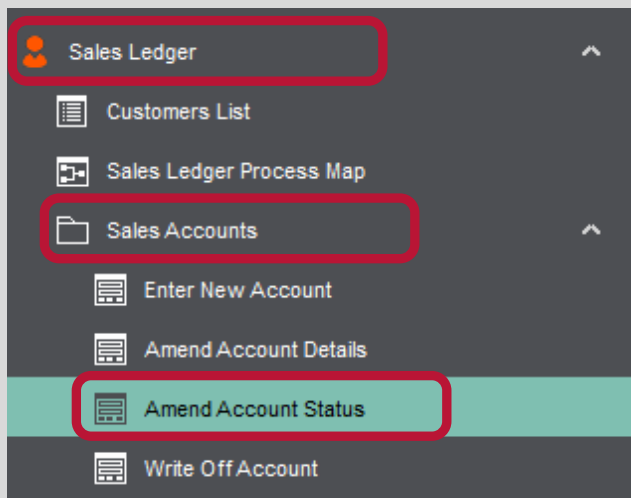




HOW TO CHANGE THE STATUS OF A CUSTOMER OR SUPPLIER ACCOUNT IN SAGE 200

1

Within the ledger of your choice, for example 'Sales Ledger';



← Go to Sales Accounts

← Click 'Amend Account Status' and the screen below will appear

2

Customer Account Status

Customer Details

Code: Name:

Short name: Address: Great Britain

Postcode:

Account Status

On Hold Active status: Reason:

Save Close

Select an account to see the current status. Here it will show if the account has been placed on hold, along with any reasons for a change in status.

The screenshot shows a window titled "Customer Account Status". It contains two main sections: "Customer Details" and "Account Status".

Customer Details:

- Code: KIT001
- Short name: Kitchen
- Postcode: CF3 5SC
- Name: Kitchen Refit Specialists Ltd
- Address: 234 Crwys Way, Rumney, Cardiff, Glamorgan, CF3 5SC, Great Britain

Account Status:

- On Hold
- Active status: Active
- Reason: (empty text box)

Buttons: Save, Close

To change an account's status, click the 'Active status' dropdown

This screenshot is identical to the one above, but the "Active status" dropdown menu is open, showing the following options:

- Active
- Active
- Hidden

The "Hidden" option is highlighted in blue. A red arrow points from the text on the left to the dropdown menu.

This will give you an option of keeping the account 'Active' or 'Hidden'. The 'Hidden' option means that the account will no longer appear on your Ledger List, which can be useful for tidying up your Ledger List to hide old accounts that are no longer in use.

Customer Account Status

Customer Details

Code: Name:

Short name: Address:

Postcode:

Account Status

On Hold Active status: Reason:

To hide an account, select 'Hidden'

Click 'Save'

The account will disappear from the ledger list once refreshed as shown below:

Code	Short Name	Name
GEO001	George	George Grey Construction
GRE001	Greene	Greene Kitchen Stores
HA00001	Ha & Db	Ha & Db Kitchen Developments Ltd.
JIM001	Jim Murr	Jim Murray Renovations
KIT001	Kitchen	Kitchen Refit Specialists Ltd
KIT002	Kitsch	Kitsch Kitchens

Before

Code	Short Name	Name
FUT001	Future	Future Homes Real Estate
GEO001	George	George Grey Construction
GRE001	Greene	Greene Kitchen Stores
HA00001	Ha & Db	Ha & Db Kitchen Developments Ltd.
JIM001	Jim Murr	Jim Murray Renovations
KIT002	Kitsch	Kitsch Kitchens

After

In order to make the account reappear on your ledger, the same process needs to be repeated except this time you're changing the 'Active Status' back to 'Active'. Click save and refresh your Ledger List and the account will reappear on the list.