



Activating, Inactivating, or Deactivating a Customer Record

This document details the steps required to change the Monitoring Status of a Customer account record.

Steps:

1. Open the Customer record which you wish to inactivate/deactivate/activate
2. Click the Edit button and enter into Edit Mode
3. Click the Monitoring Status button (Located just to the Right of the Status section on the lower right-hand portion of the main Customer form)
4. Select the applicable Status
5. If you are inactivating or deactivating an account you will be prompted with an Are you Sure? Dialog,
6. Next you will be asked for a delete code and reason. Many sites use the Month and Year for their Delete Code as it is numeric, such as 0511.
7. Save the record

Definition of Active, Inactive, Deactivated

Active - The account will send exceptions to an operator's attention and counts toward your total number of licensed accounts.

Inactive - The account will NOT send exceptions to an operator's attention, it will log activity to history, and counts toward your total number of licensed accounts.

Deactivated - The account will NOT send exceptions to an operator's attention, it will NOT log activity to history, and does NOT count toward your total number of licensed accounts.