

How to Deactivate a Term

Note: Once a Term is already deactivated, it will still be visible on transactions that already used that term but will not be available for selection for new transactions.

Deactivating a Term that is not used in an entity:

- 1. On the user's menu panel go to **Common Info** menu then click **Terms**
- 2. Select a record from the search list then open
- 3. Uncheck the **Active** check box

The screenshot shows a form titled "Terms - 1% 5, Net 20". It has tabs for "Details", "Audit Log", and "Report Translations". The "Details" tab is active. The form contains the following fields:

- Terms: 1% 5, Net 20
- Terms Code: 3
- Type: Standard
- Discount for Early Payment: 1.000
- Discount Days: 5
- Balance Due: 20
- APR for Interest: 0.000
- Allow EFT on Invoices: ☒
- Include Tax on Discount: ☐
- Energy Trac: ☐
- Active: ☐

The "Active" checkbox is highlighted in yellow. The bottom status bar shows "1.39s | Edited" and "1 of 1" records.

- 4. Click the **Save** button to save the changes. Term will be deactivated.

If a Term is already used in an Entity, it cannot be deactivated

Deactivating a Term that is not used in an entity:

- 1. On the user's menu panel go to **Common Info** folder then click **Terms**
- 2. Uncheck the **Active** check box column on a Term

The screenshot shows a table titled "Terms". It has columns: Terms, Origin Terms Code, Discount for Early Payment, Discount Days, Balance Due, APR for Late Payment, Allow EFT on Invoices, and Active. The table contains the following data:

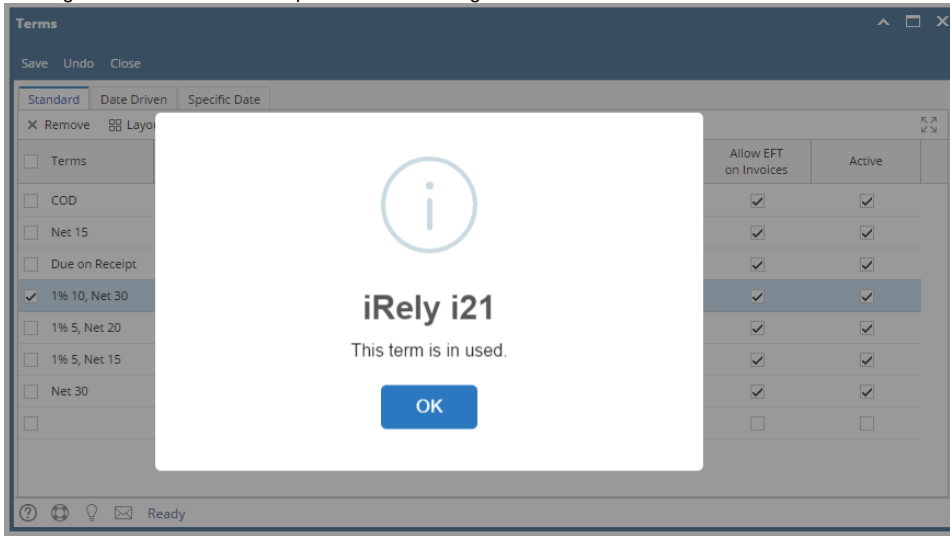
Terms	Origin Terms Code	Discount for Early Payment	Discount Days	Balance Due	APR for Late Payment	Allow EFT on Invoices	Active
<input type="checkbox"/> COD	99	0.00%	0	0	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Net 15	6	0.00%	0	15	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Due on Receipt	5	0.00%	0	0	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> 1% 10, Net 30	4	1.00%	10	30	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> 1% 5, Net 20	3	1.00%	5	20	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> 1% 5, Net 15	2	1.00%	5	15	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Net 30	1	0.00%	0	30	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> 10%	7	0.00%	0	25	0.00%	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		0.00%	0	0	0.00%	<input type="checkbox"/>	<input type="checkbox"/>

The "Active" checkbox for the 10% term is highlighted with a red box. The bottom status bar shows "Edited".

- 3. Click the **Save** button to save the changes. Term will be deactivated and cannot be selected on Entity.

Deactivating a Term that is already used in an entity:

1. On the user's menu panel go to **Common Info** folder then click **Terms**
2. Clicking the Active checkbox will produce this message box



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<input type="checkbox"/> Terms	Origin Terms Code	Discount for Early Payment	Discount Days	Balance Due	APR for Late Payment	Allow EFT on Invoices	Active
<input type="checkbox"/> 3%	9	20.00%	12	22	10.00%	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> COD 1	99	0.00%	0	0	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Net 15	6	0.00%	0	15	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

3. Click the **Save** button to save the changes. Term will be deactivated and cannot be selected on Entity.

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