



Global 3000 Service Pack Note

Archive Inactive Account - Reseller Intercepts

Author	DCP		
Project	ZM60_000253.doc		
Version	1.0		1 of 7

INTRODUCTION

This service pack updates the 'Archive Inactive Accounts' function and extends the reseller intercepts to provide a new reseller intercept point.

This service pack extends the reseller intercepts to include a new intercept point invoked immediately before an account has its status changed from active to inactive.

The archive inactive accounts function has been updated to ensure that before an account is archived the system checks that it has no outstanding sales orders or purchase orders.

In addition the End of Period function has been updated to allow the archive date to be specified when the option to archive inactive accounts is selected.

DOCUMENTATION CHANGES

DL – Archive Inactive Accounts

**Archive accounts
with SOP
quotations?**

(Only if SOP is in use) Set this to allow accounts meeting the selection criteria but with SOP quotations (but no outstanding sales orders) to have their account status set to 'inactive'.

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Note

If SOP is in use accounts with outstanding sales orders are not set to status 'inactive'.

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DL – End of Period

global-dev:24 - P2 - Debtors Period End Company: A1 Period: 3/2005

File Run Settings Options Help

Debtors Period End

Company Selection
☒ Single company

Information
 Current period - Year
 Period
 Ending
 End of the new current period

Functions
☐ Print for analysis report?

Archive Inactive Accounts

Information
 All accounts that have had no payment or invoice activity since the archive date specified below and have no outstanding sales orders (if SOP is in use) will have their account status changed to inactive.

Date
 Archive date

☒ Archive inactive accounts? Archive date
☐ Purge transactions prior to period 03/1998 (ending 31/03/1998)?

OK Cancel

Next > Cancel

Partition 2 Computer 1D 11:08:24 DCP DL200/AA

Archive date? When archiving accounts, all accounts are checked for:-

- Zero balance in all trading currencies active for the account,
- Zero balance in base currency,
- All transactions fully allocated,
- No future period postings.
- No outstanding sales orders or quotations (if SOP is in use)

All accounts meeting the above criteria on which the last payment date and last invoice date in all companies in which the account operates fall before the archive date, are marked as status inactive.

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CL – Archive Inactive Accounts

The screenshot shows a window titled "global-dev:24 - P2 - Archive Inactive Accounts". Inside, there's a sub-dialog titled "Archive Inactive Accounts".

Information:
Accounts that have had no payment or invoice activity since the archive date or for a specified number of days prior to today's date and have no outstanding purchase orders (if POP is in use) will have their account status changed to inactive.

Range:
Suppliers: **All** (dropdown)
From: [] (dropdown) [] (text)
To: [] (dropdown) [] (text)

Date:
Check for: **Period of inactivity** (dropdown)
Period of inactivity: [] days
Archive date: []

Accounts will be checked for no payment or invoice activity since / /

Buttons: Search, Proceed, Cancel

Footer: Partition 2 Computer 1D | 11:31:48 DCP | CL290/W1 | EDT | NUM

Note If POP is in use accounts with outstanding purchase orders are not set to status 'inactive'.

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CL – End of Period

Archive date?

When archiving accounts, all accounts are checked for:-

- Zero balance in all trading currencies active for the account,
- Zero balance in base currency,
- All transactions fully allocated,
- No future period postings.
- No outstanding purchase orders (if POP is in use)

All accounts meeting the above criteria on which the last payment date and last invoice date in all companies in which the account operates fall before the archive date, are marked as status inactive.

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Appendix A – Reseller Intercept Point

This service pack introduces a new intercept point for reseller use.

The intercept point allows resellers to include additional processing **before** an account in Debtors Ledger or Creditors ledger has its account status changed from 'Active' to 'Inactive' and prevent the change if required.

The new intercept routine, named AS%ACC-STATUS-INTERCEPT resides in DLM CO031 (along side the transaction intercepts provided by routine TR%INT-INTERCEPT). It is always called with the following two parameters.

77 &&SRCE	PIC X(2)	* Calling Source module DL/CL
77 &&ACC	PIC X(7)	* Customer/Supplier account code

Source file S.CO031 is available on request.

If an exception is returned from a call to AS%ACC-STATUS-INTERCEPT the change in account status will be prevented. Please note, the application will not issue an error message, if one is required it must be coded in the resellers tailored DLM routine.

The following table lists the places the application that the new intercept point will be invoked after this service pack is applied.

Module	Function	Frame/Window	Routine
DL	Customer Maintenance	DL410_W1	V-FRSTA
DL	Archive Inactive Accounts	DL290_W1	N/A
CL	Supplier Maintenance	CL410_W1	V-FRSTA
CL	Archive Inactive Accounts	CL290_W1	N/A

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