Closing a client (never delete a client unless it was opened accidentally).

On the "Clients" screen, select the client you want to close by clicking on it, it will highlight and then select "Close This Client" lowest left button, left side of "Clients" screen. You do not need to write off the balance. The uncollected balance on each closed client is available on the Accounts Receivables Report for Closed Clients. To write off the balance, go to the "Log" screen and enter a zero in "Hours" a minus before the amount to be written off in "Amount" and some appropriate description. The Produce one more statement for the client which will zero out the balance. Again this latter step is unnecessary. You can close a client and retain the ending balance. We are developing a routine in the close process on the "Clients" screen that asks you if you want to write off the balance and it writes it off. That feature will be available in the fall of 2017. This feature will also allow you to write off a balance on a previously closed client without reopening it.