



25 Archiving and restoring an individual's personal bank account

The Archive/restore function is available to the following users:

- Local authority administrator users (but only users with the 'Is a member of staff?' option turned on).
- Budget managers.
- SAG Users (system administrators).

How to archive a personal bank account

In order to archive a personal bank account, the account must have:

- No outstanding orders or actions attached to it.
- An 'active' status.

When an account has been archived, all documents relating to the personal bank account will be hidden to the user.

To archive an account, simply follow the instructions below:

1. Navigate to the Individuals tab and select the account to be archived. Click the Archive action

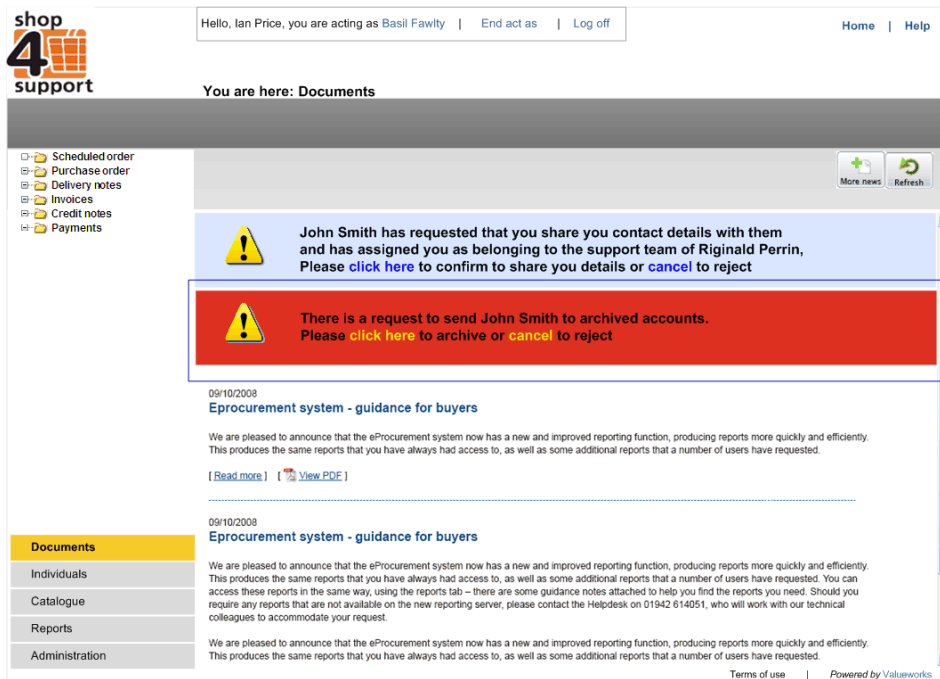


2. The account that you wish to archive will be moved the Pending Archive file and a notification will be sent to the following users:
 - Local authority business users (but only users who have the 'Is a member of staff?' option turned on).
 - Budget managers.

The notification will show on the user's homepage, as shown below. At this stage they can confirm or reject the request to archive, by clicking the relevant message on the notification.

If they confirm the request the personal bank account will be archived.

If they cancel the request the personal bank account will revert back to an 'active' status.



Restoring an archived personal bank account

To restore an archived account, navigate to the active personal bank account and click on the Show Archived button.

All archived accounts will be highlighted in grey, as shown below. Select the relevant account and then



click the Restore action button. The restored account will show as 'active' in the account list.

shop 4 support

Hello, Ian Price, you are acting as Basil Fawley | End act as | Log off

You are here: Individuals

Search by PBA: Basil Fawley | Filter by PBM: Show All | Filter by PBA: Show archived

Archive Restore Create Acc Print Refresh

Action	Name	Ref No.	Address	Personal budget manager	Current balance
<input type="checkbox"/>	Amy Smith	2125879623	2 College Street, Leigh, Wigan, WN7 2RF	Basil Fawley	£ 1,100.25
<input type="checkbox"/>	Arthur Smith	2125879624	3 Crown Avenue, Formby, Liverpool, L37 6ZZ	Basil Fawley	£ 1,100.26
<input type="checkbox"/>	Bill Smith	2125879625	2 Firtree Walk, Lovton, Warrington, WA3 2 NW	Basil Fawley	£ 1,100.27
<input type="checkbox"/>	Carol Smith	2125879626	14 Mayfield Road, Orrell, Wigan, WN5 0HZ	Basil Fawley	£ 1,100.28
<input type="checkbox"/>	Chris Smith	2125879627	126 Lowe Lane, Bare, Morecambe, LA4 2NW	Basil Fawley	£ 1,100.29
<input type="checkbox"/>	Craig Smith	2125879628	8 Osbourne Ave, Wigan Road, Atherton, M46 0JE	Basil Fawley	£ 1,100.30
<input type="checkbox"/>	Helen Smith	2125879630	43a Moor Lane, Clitheroe, BB7 1BE	Basil Fawley	£ 1,100.32
<input type="checkbox"/>	John Smith	2125879631	2 College Street, Leigh, Wigan, WN7 2RF	Basil Fawley	£ 1,100.33
<input type="checkbox"/>	Matt Smith	2125879633	2 Firtree Walk, Lovton, Warrington, WA3 2 NW	Basil Fawley	£ 1,100.35
<input type="checkbox"/>	Paul Smith	2125879635	126 Lowe Lane, Bare, Morecambe, LA4 2NW	Basil Fawley	£ 1,100.37
<input type="checkbox"/>	Sharon Smith	2125879636	8 Osbourne Ave, Wigan Road, Atherton, M46 0JE	Basil Fawley	£ 1,100.38
<input type="checkbox"/>	Terry Smith	125879637	14 Merton Rd, Stanley Road, Bootle, L20 3DL	Basil Fawley	£ 1,100.39

Documents

Individuals

Catalogue

Reports

Administration

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Ticking checkbox user will get summary grid including available for user PBA in 'Active' state mixed with available for user PBA in 'Archived' state