Activate/Deactivate a Batch

To activate/deactivate a batch, complete the following steps:

1. From the **Check Processing** tab, select **Batch Management**. The *Search Batch* page appears.
2. In the search field, under **Batch Search Conditions**, enter an **OTCnet Endpoint** and select the **magnifying glass** icon (or the **ENTER** key) to retrieve a new set of results.
3. Select the **OTC Endpoint** you want to **Edit** a batch for by checking the checkbox under the **Select** column.
4. Under **Created On Date**, enter the **From** and **To** date range, as needed.

Application Tip

Only batches with an **Open** or **Closed** status can be activated/deactivated. Additionally, batches currently in use cannot be deactivated.

Application Tips

- There is an endpoint search restriction set based on **user permissions** (i.e., a **CCLO**, **CCA** user can only search for their Agency and any endpoints under their Agency.).
- The **From** and **To Created On Date** must be entered in MM/DD/YYYY format.
- The **Created On Date** range cannot exceed 30 days. Additionally, if more than 1,000 batches are created within 30 days, then only the most recent 1,000 batches appear.
- When running a search *with* the default **From** and **To Created On Date** range values, the search results include the most recent 30 days of batches that you have access to view. If more than 1,000 batches are created within the 30 days, then only the most recent 1,000 batches appear.
- When running a search *without* specifying any criteria (with the exception of the **Batch ID** field), the search results include the most recent 30 days of batches that you have access to view. If more than 1,000 batches are created within 30 days, then only the most recent 1,000 batches appear.

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o Enter the **Batch ID**, *optional.*
o Enter the **Cashier ID,** *optional.*

Application Tip

If the only search criteria entered is a valid **Batch ID,** then only a single result appears regardless of other search criteria specified.

Under **Batch Status**, *optional*

- o Select the **Status** you want to activate/deactivate by checking the **Open** and/or **Closed** boxes under the **Select** column.
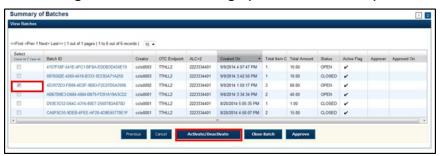
Application Tip

Only batches with an **Open** or **Closed** status can be activated/deactivated. Additionally, batches currently in use cannot be deactivated.

5. Select **Search**. The *Summary of Batches* page appears.

6. Check the checkbox of the **Batch ID** you want to activate or deactivate and select **Activate/Deactivate**. The *Activate/Deactivate Batch* page appears, as shown in Figure 1.

Figure 1. View Batches Page (Activate/Deactivate)

Application Tip

If a batch is activated or deactivated a check appears under the **Active Flag** column. If a batch is deactivated, the **Active Flag** column is blank.

7. Select **Confirm**. A message appears stating the batch(es) have been activated/deactivated and the value under **Active Status** updates to Active/Inactive.

Additional Buttons

- Select **Return to Batch Summary** to return to the batch summary page.
- Select **Return Home** to return to the OTCnet homepage.