Enterprise - How to Deactivate a Contact

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For data integrity purposes, Enterprise does not allow contact records to be deleted. Instead, they can be:

- Deactivated
- Updated to a new status
- Connected to a different customer record

Deactivate the Contact:

Navigate to the visifile of the contact record you wish to deactivate. Note that the bright green active icon indicates the contact is currently active:

<u>п</u> : т	Sandra Jetson Applia 1525 Hennep Eagan, MN	ance (Primary), Dire bin Road (33	24) 234-2344 : 9205		Jim / Bigelow - call - f/u to our cold	im/Jetson - call - schedule 1st meet	
		contact sr		++	► tasks appointments social	phone/email	+ 7 0 +
	s ments	Title Company Name	Director of HR		Active Memphis SE	Sandy@JetsonAppliance.com	т ^
 integr mess tasks searc 	ages	Email Notes	Sandy@JetsonAppliance.com	Date	10/5/2015 7:26:00 AM	(124) 204 2044	_
		messages					1. 🗩
					No Records Found		

To deactivate the contact, click to add a message (1.). Select the message action code which begins with "deact". Enter a brief description in the body of the message and click "post" to save:

Action Deact	-	$\mathbf{\Sigma}$	Import from Email Inbox
Moving to Kansa Details Date/Time Rep Name	Email Attachme 10/5/2015 3:41:28 PM dwood	nts	follow-up There are currently no follow-up items for this message. ✓ create a task IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII

Note Please check with your TempWorks System Administrator for which action codes will deactivate records as these are managed by your administrative team.

Notice, after logging the message to deactivate the record, the active icon will dim:

	Sandra La	nsing	
п=	Jetson Appliano 1525 Hennepin	Road	(324) 234-2344
TT	Fagan, MN 551	121	ID: 9205

Once a contact is deactivated, they will no longer appear in search results for active records.

Contact No Open Contact Reco	ords.	+ +	¢★⊡	Q 🛧 🕈	► tasks	• tasks appointments social email					
	Last Name		Contact ID		Customer ID		Rep Name	All Reps	-	0	
ents	First Name		Status	Active	Customer		Branch	All Branche	Ŧ	Search	•

Note To reactivate a contact, log a message on their record using an action code which that begins with "react".

Change the Status of the Contact:

If a contact is still working for the customer, but are no longer a buying influence (example 1) or the contact is no longer working for the customer but we still want to stay in touch with them (example 2) change the contact status.

Example 1: You've been working with someone in the human resources department and they move to the accounting department in accounts receivable. They are still with the company but we would not be working with them any longer. You may want to change their status to no longer valid or inactive so they will no longer continue to show when viewing the customer record.

Example 2: You've been working with someone in the human resources department of the customer. They leave that company and are expected to start working at another company. That company can become our prospect because of the relationship we've built with the contact. In this case, you may want to change the contact's status to prospect.

From the contact details form select the proper status:

	Sandra Lansing etson Appliance (Primary) 525 Hennepin Road agan, MN 55121	(324) 234-2344 ID: 9205			Jim / Bigelo	all - peak season w - call - f/u to our	cold	ietson - call - schedule 1st meet	
visifile	person	al information	V V X L	⊴ Q + ↓	► Lasks a	customer i	information		+ + Q +
 details contact meth 	First Name					Customer Customer Name	Jetson Applia	990 992	+ م م
documents	Last Name Title	Lansing Director of HR Sandy				Department Name		nce	
 integrations messages 	Nickname				Address	Primary		~	
tasks	Honorific						1525 Hennepin Road	-	
search	Birthday						Lagan, why 5	5121	
	ID	9205	Employee		- Q				
		t information				other infor	mation A Active		
	Street 2						Status	Description	Ê
	City E	agan				Rep	A	Active	
	State	۸N ×	Zip	55121		Branch	B	Bid Credit Check in Progress	
employee	Country	Inited States of America			*	Vendor	D	Do Not Service	
customer						How Heard of	н	Hold for Credit Check	
order						Details	L	Inactive Lost	
assignment	t						N	No longer valid	
contact							Р	Prospect	
calendar						Notes	S1	Sourcing - Great	
reports							T W	Target Cash on Delivery	
								cash on Denvery	*

Depending on the status selected, the contact will no longer appear on the customer visifile. By default, "no longer valid", "inactive", and "do not service" will hide the contact from the customer visifile. Please check with your TempWorks Administrator for specific statuses and how they will affect the contact's visibility.

Note The contact status can be used in conjunction with deactivating the contact, or on its own.

Change the Customer Affiliation of the Contact:

Occasionally, a contact will move to a new organization or department, but continue to work with your staffing firm. If a contact does move within the company, or to another one, you will want to update who they are affiliated with in Enterprise.

From the contact details form, use the drop-down to select the new customer, or department the contact will be moving to:

Sandra Lan Jetson Appliance 1525 Hennepin Ro Eagan, MN 5512	(Primary), Director of Hi bad (324) 234-23	44		- call - f/u to our col		chedule 1st meet		
VIOINIC	personal informat	+ +		ppointments customer info			+ * :	
documents integrations messages tasks search	Last Name Lansing Director of HR Director of HR Sandy Honorific IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	Employee	• Q	Customer Name Department Name Address	Customer Jetson Appliance Jetson Appliance Jim's Tires Jim's Tires JikL Inc. Jobspecs Joe's Market John's Invoice Testers John's Monthly Billing John's Monthly Billing John's Monthly Billing	Department Accounting Primary Primary Primary Primary Primary John's Bi-Weekly E John's Weeklt=y D Primary Primary		

Note After changing the customer affiliation of the contact, all activity logged moving forward on the contact will be reflected in the new customer record. Any old activity that existed before the contact was moved will remain on the old customer record. On the contact record all activity will be displayed.

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