

How to Deactivate a Contact

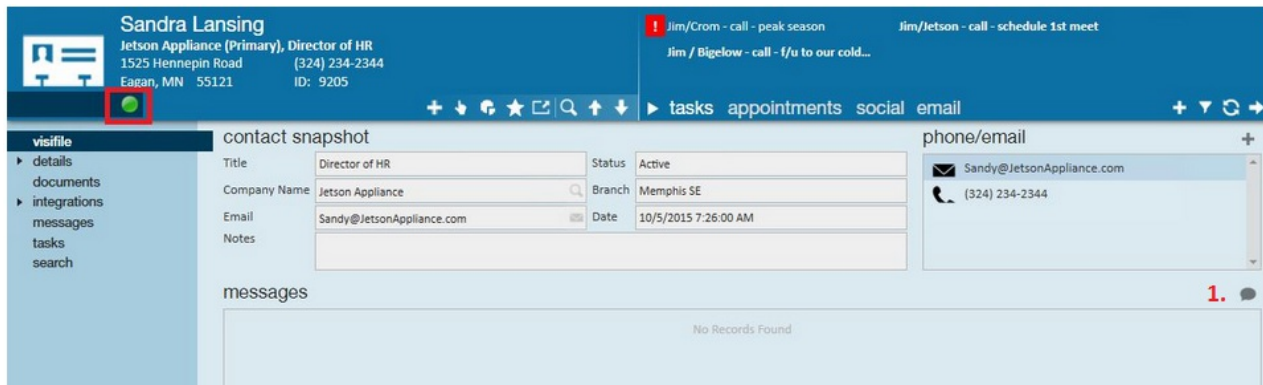
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For data integrity purposes, Enterprise does not allow contact records to be deleted. Instead, they can be:

- 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:



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:

The screenshot shows a software interface for managing messages. At the top, there is a blue header with a speech bubble icon and the word 'message'. Below this, there is a red-bordered box containing an 'Action' dropdown menu currently set to 'Deact'. To the right of this box is an 'Import from Email Inbox' button with an envelope icon. Below the action box is a large text area containing the message: 'Moving to Kansas, no longer with Jetson.'. At the bottom of the interface, there are two main sections: 'Details' and 'follow-up'. The 'Details' section has three tabs: 'Details', 'Email', and 'Attachments'. Under the 'Details' tab, there is a list of fields with their corresponding values: Date/Time (10/5/2015 3:41:28 PM), Rep Name (dwood), Link Employee (empty), Link Contact (Lansing, Sandra), Customer (Jetson Appliance), Link Order (empty), and Link Assignment (empty). Each 'Link' field has a chain-link icon to its right. The 'follow-up' section has the heading 'follow-up' and the text 'There are currently no follow-up items for this message.' Below this text are two options: 'create a task' with a checkmark icon and 'schedule an appointment' with a calendar icon. At the bottom right of the interface, there is a 'Post' button with an envelope icon.

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:

The screenshot shows a contact card for Sandra Lansing. The card has a blue background and contains the following information: Name: Sandra Lansing; Title: Jetson Appliance (Primary), Director of HR; Address: 1525 Hennepin Road, Fagan, MN 55121; Phone: (324) 234-2344; ID: 9205. On the left side of the card, there is a small icon of a person with a green dot next to it, which is highlighted by a red box. This icon represents the contact's active status.

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

records.

The screenshot shows a CRM interface for a contact record. At the top, there is a blue header with the word 'Contact' and the text 'No Open Contact Records.' Below this, there are navigation icons and tabs for 'tasks', 'appointments', 'social', and 'email'. The main form area contains several input fields: 'Last Name', 'First Name', 'Contact ID', 'Customer ID', 'Rep Name' (with a dropdown menu set to 'All Reps'), and 'Branch' (with a dropdown menu set to 'All Branche'). A 'Status' field is highlighted with a red box and contains the text 'Active'. There is also a 'Search' button on the right side of the form.

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
 Jetson Appliance (Primary), Director of HR
 1525 Hennepin Road (324) 234-2344
 Eagan, MN 55121 ID: 9205

Jim/Crom - call - peak season Jim/Jetson - call - schedule 1st meet
 Jim / Bigelow - call - f/u to our cold...

tasks appointments social email

visifile
 details
 contact methods
 documents
 integrations
 messages
 tasks
 search

personal information
 First Name: Sandra
 Last Name: Lansing
 Title: Director of HR
 Nickname: Sandy
 Honoric:
 Birthday:
 ID: 9205 Employee: [dropdown]

customer information
 Customer: Jetson Appliance
 Customer Name: Jetson Appliance
 Department Name: Primary
 Address: Primary
 1525 Hennepin Road
 Eagan, MN 55121

contact information
 Street: 1525 Hennepin Road
 Street 2:
 City: Eagan
 State: MN Zip: 55121-____
 Country: United States of America

employee
 customer
 order
 assignment
contact
 calendar
 reports

other information

Status	Description
A	Active
B	Bid
C	Credit Check in Progress
D	Do Not Service
H	Hold for Credit Check
i	Inactive
L	Lost
N	No longer valid
P	Prospect
S1	Sourcing - Great
T	Target
W	Cash on Delivery

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:

The screenshot shows a CRM interface for a contact named Sandra Lansing. The contact's personal information is displayed on the left, and a list of customer information is shown on the right. The customer information list is highlighted with a red border.

Personal Information:

- First Name: Sandra
- Last Name: Lansing
- Title: Director of HR
- Nickname: Sandy
- ID: 9205

Customer Information Table:

Customer	Department	Customer ID
Jetson Appliance	Accounting	4295010875
Jetson Appliance	Primary	4295010869
Jim's Tires	Primary	4295009992
Jim's Tires	Shipping	4295009997
JKL Inc.	Primary	4295009980
Jobspecs	Primary	779639
Joe's Market	Primary	10410
John's Invoice Testers	Primary	4294999594
John's Monthly Billing	John's Bi-Weekly E	4294989573
John's Monthly Billing	John's Weeklity D	4294989572
John's Monthly Billing	Primary	4294989571
Johnson and Johnson	Primary	4295010690

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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