How to Deactivate a Contact

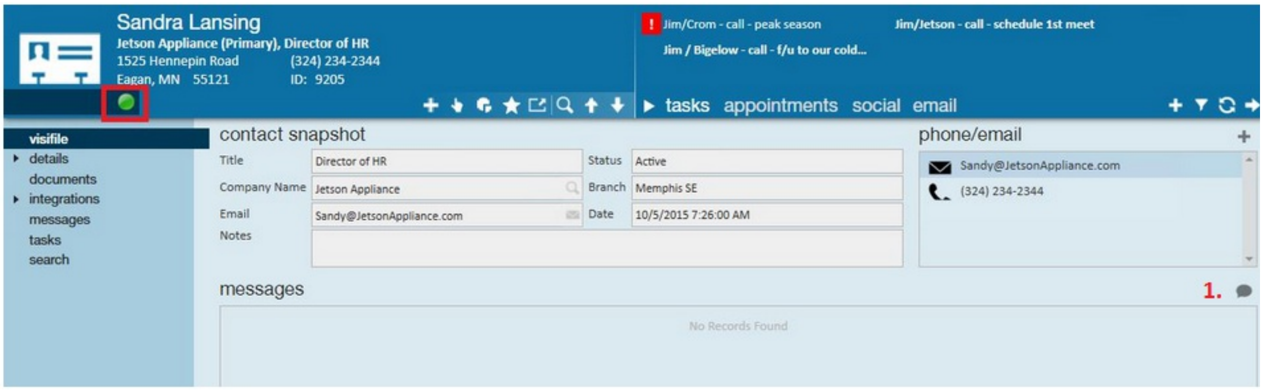
Last Modified on 05/03/2018 4:31 pm CDT

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

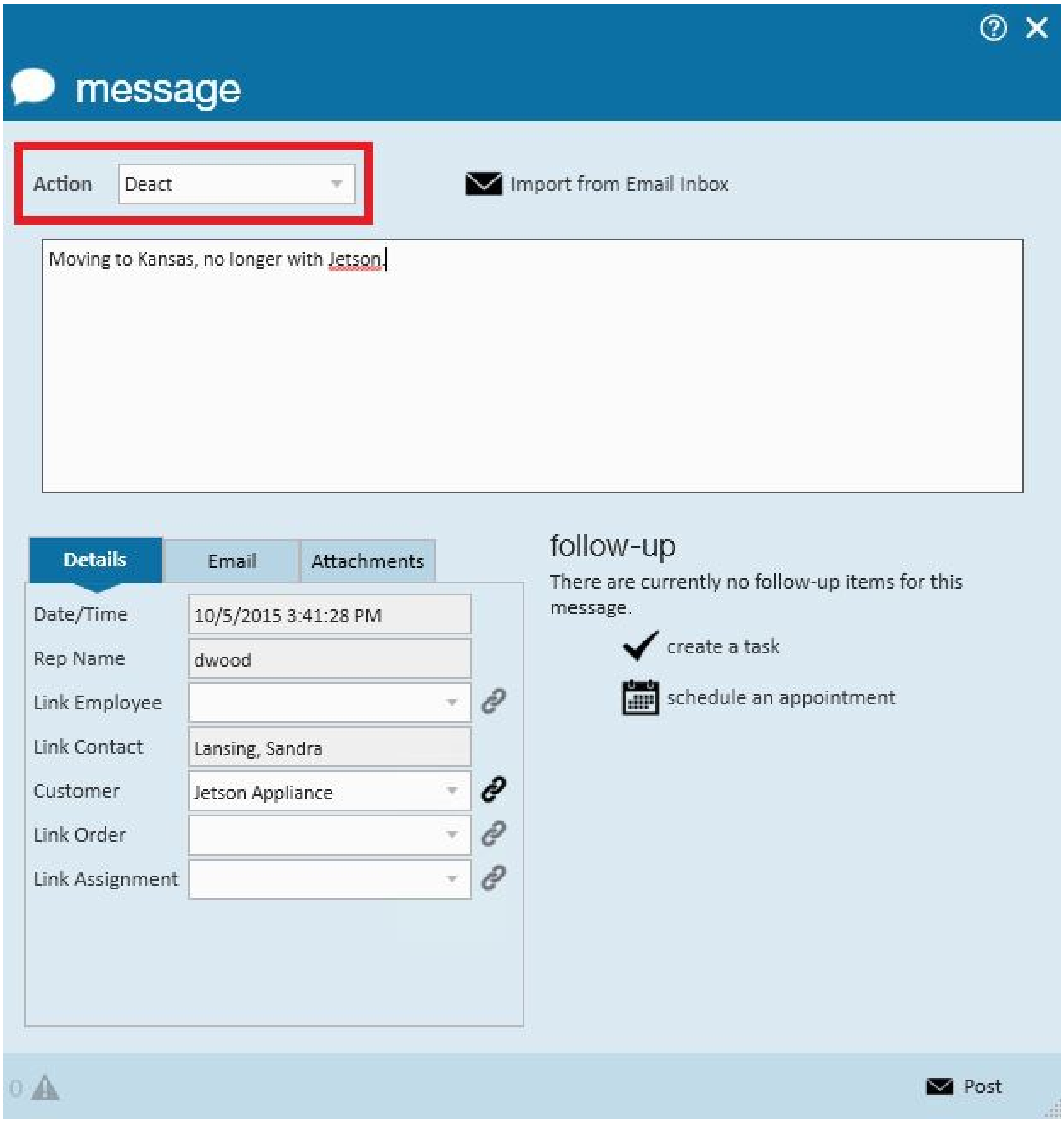
- Deactivated
- Updated to a new status
- Connected to a different customer record

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:



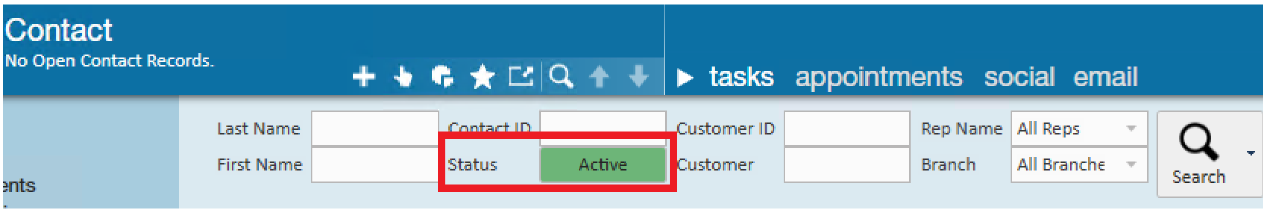
To deactivate the contact, click to add a message (1.). Select the message action code which begins with "deact". Enter a brief description in the body of the message and click "post" to save:



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:

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



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

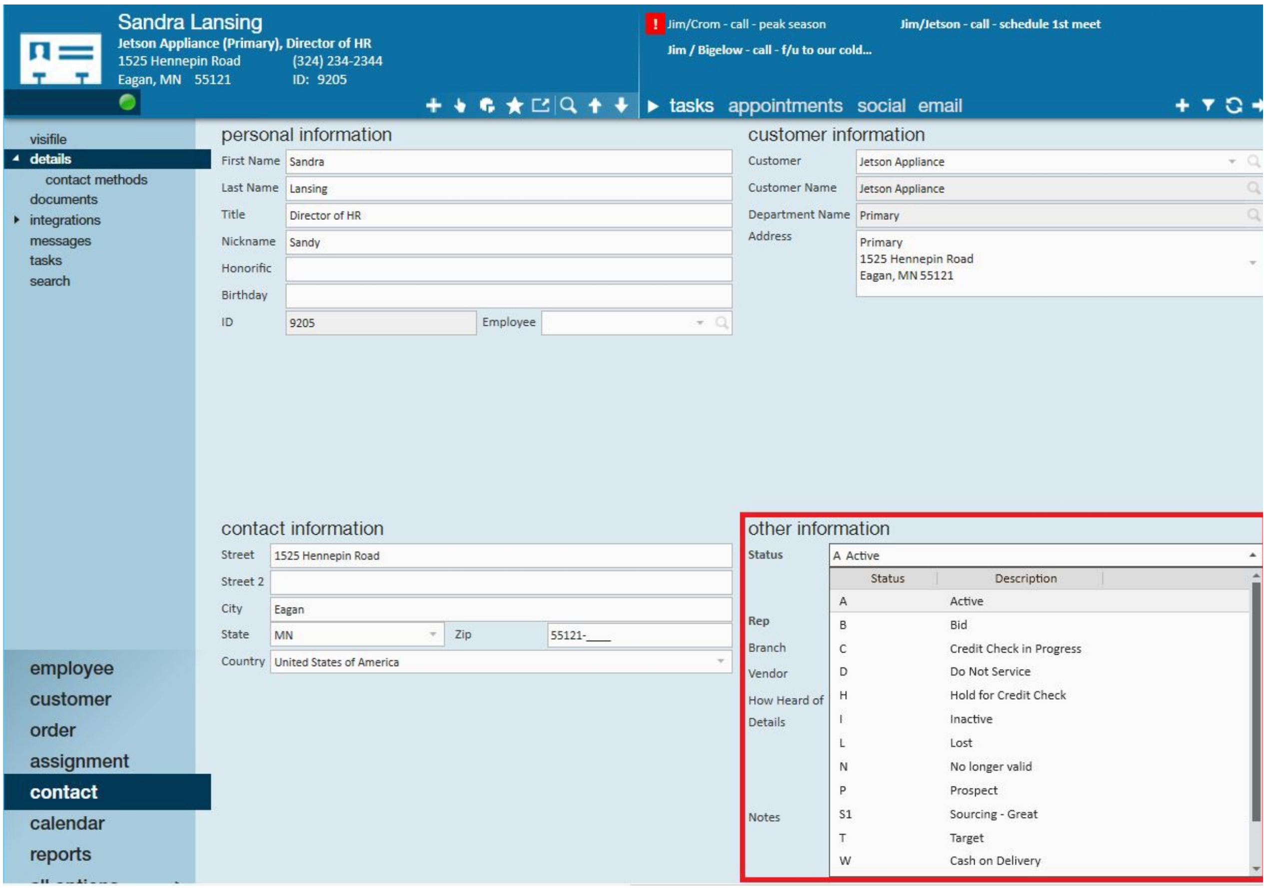
Change the Status of the Contact:

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 You may want to change their status to no longer valid or inactive so they will no longer continue to show when viewing the customer record.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:



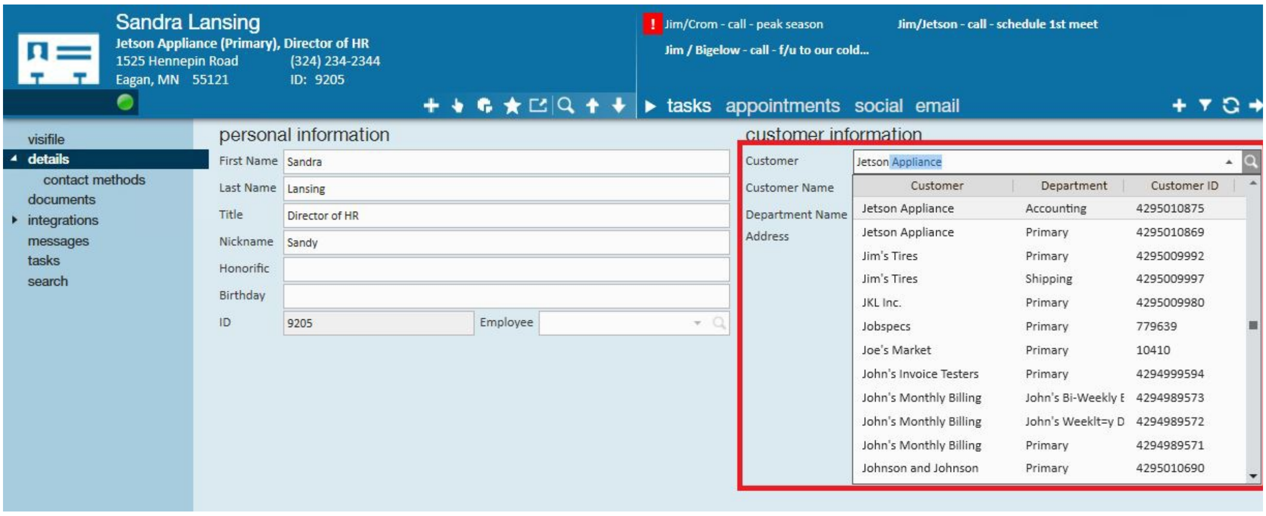
Depending on the status selected, the contact will no longer appear on the customer visifile. By default, "no longer valid", "inactive", and "do not service" will hide the contact from the customer visifile. Please check with your TempWorks Administrator for specific statuses and how they will affect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



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.

Related Articles