Enterprise - How to Deactivate a Contact

Last Modified on 02/26/2025 3:26 pm CST

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:

10		Sandra La etson Applian 525 Hennepir agan, MN 53	ansing ice (Primary), Dire in Road (3 5121 ID	ector of HR 24) 234-2344 1: 9205			Jim/Crom - call - peak season Jim / Bigelow - call - f/u to our cold	Jim/Jetson - call - schedule 1st meet	
_	101	2	contact sr	+		++	► tasks appointments soc	al email	+ 2 +
 de do 	tails cuments		Title	Director of HR		Status	Active	Sandy@JetsonAppliance.com	Ť
 int me tas 	egrations essages eks		Email Notes	Sandy@JetsonAppliance	e.com as	Date	Memphis SE 10/5/2015 7:26:00 AM	(324) 234-2344	
se	arch		messages	5			No formation of the		1. ●

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	*	🔽 In	port from Email Inbox
Moving to Kansa	s, no longer with Jetson. Email Attachmer 10/5/2015 3:41:28 PM dwood	nts	follow-up There are currently no follow-up items for this message.

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 Lansing										
п=	Jetson Appliance 1525 Hennepin F	Director of HR (324) 234-2344								
T T	Fagan, MN 551	.21	ID: 9205							

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

Contact No Open Contact Records. + + + ↓ ↓ ∠ ↓					▶ 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 L Jetson Applia 1525 Hennep Eagan, MN	Lansing Ince (Primary), in Road 55121	Director of HR (324) 234-2344 ID: 9205			Jim/Crom - o Jim / Bigelo	all - peak season w - call - f/u to ou	Jim/. cold	letson - call - schedule 1st meet	
	persona	+ 🔸	¶ ★ 0	2 Q ↑ ↓	▶ tasks a	ppointment	s social e	email	+⊽Q→
 details 	First Name	Sandra				Customer	letson Annlia	nce	+ 0
contact methods	Last Name	Lansing Director of HR			Customer Name	letson Applia	nce	0	
documents	Title					me Primary			
messages	Nickname	Sandy				Address	Primary		
tasks	Honorific					1525 Henne	1525 Hennepin Road	-	
search	Birthday					Eagan, MN 55121			
	ID	9205	Employee		- Q				
	Contact Street 11 Street 2 City Ea State M	: information 525 Hennepin Road 1990 N - Zip		55121		Other infor Status Rep Branch	Mation A Active Status A B C	Description Active Bid Credit Check in Progress	^
employee	Country U	nited States of America			Ψ.	Vendor	D	Do Not Service	
customer						How Heard of	н	Hold for Credit Check	
order						Details	1	Inactive	
assignment							L	Lost	
contact							P	Prospect	
contact						Notes	S1	Sourcing - Great	
calendar							т	Target	-
reports							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:

Sandra Lansing Jetson Appliance (Primary), 1525 Hennepin Road Eagan, MN 55121	Director of HR (324) 234-2344 ID: 9205	Jim/Crom - call - peak season Jim / Bigelow - call - f/u to ou	Jim/Jetson - call - si r cold	chedule 1st meet		
visifile persona details First Name	+ • • • ★ ⊡ Q + • al information	► tasks appointment customer	s social email		+ * (
 defaults contact methods documents integrations messages kask search 	Sandra Lansing Director of HR Sandy 9205 Employee	Customer Customer Nam Customer Nam Department Na Address	Jetson Appliance Customer Jetson Appliance Jim's Tires Jim's Tires JKL Inc. Jobspecs Joe's Market John's Invoice Testers John's Monthly Billing John's Monthly Billing Johnson and Johnson	Department Accounting Primary Primary Primary Primary Primary John's Bi-Weekly E John's Weeklt=y D Primary Primary Primary	Customer ID 4295010875 4295009992 4295009997 4295009980 779639 10410 4294898573 4294989571 4294989571 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.

Related Articles