Beyond - Deactivating Contact Records

Last Modified on 04/18/2024 3:46 pm CDT

Why Deactivate Contacts?

People retire, get promoted, or find a different job all the time. When an important customer contact leaves your customer, you'll want to deactivate the contact record to ensure your teams aren't calling someone who no longer works there.

Deactivating a contact allows you to keep the record incase the person comes back or the information on the record is needed for some reason while ensuring the record does not appear in any active searches, etc.

How to Deactivate a Contact

Ready to deactivate a contact record? Follow these steps:

- 1. Navigate to the Contact record you want to deactivate
- 2. From the visifle or the details tab select the "Status" field or select the charm within the contact header and select "Change Status" to open the "Change Status" sidebar:

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Recent History	∧ Snapshot		Change Status			
Susan Billiar	Title General Manager	Customer Krommy Equipment - Primary				
	Branch High Tech NE	Company				
	Status Active >					

3. A new sidebar will open, use the drop down to select the "Inactive" or related status

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Recent History A	Title General Manager Branch Mich Tech ME	Customer Krommy Equipment - Primary Company	Feel free to use any of the following actions, and then save the new status.
	Status Active >		
	Vote Contact Information	پ	CREATE LIDAK 23
	✓ Messages	•	SAVE STATUS

4. You may be asked or required to complete additional actions depending on yourStatus Change Workflow, we recommend logging a message stating why you are deactivating the record so that it is saved

Compose Message		
* Message		
Susan is retiring from Krommy Equipment.		
* Action		
Deact		\sim
	CANCEL	SUBMIT

5. Select Save Status at the bottom of the sidebar once you ready

You will be able to see the status indicator charm is now set to grey to show that it is inactive:

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Susan Billiar : Visifile / 2176	Title General Manager	Customer Krommy Equipment - Primary					
	Branch High Tech NE	Company					
	Status Inactive >						

Inactive contacts will <u>not</u> appear in the contact card on the associated customer record visifile:

VISIFILE	DETAILS 🗸 DEFAUI	.TS 🗸	DOCUMENTS	INVOICE HISTORY	MORE	~	t≡
^ Cont	acts					(Ð
	Ben, Jerry (11458) Account Recievable (801) 555-1234						
	Burton, Hal (11159) AP (651) 651-5510	Hal	Burton@xip.;	kom			

Searching for Inactive Contacts

Need to reactivate a record or check on an old note? Don't worry, deactivated records are easy to find!

Navigate to the contact search from the Beyond Menu > Records or from the contact icon in the upper left:

< Contact Search								
Bookmarks 🔨	BA	ASIC	AD	VANCED				
No bookmarks added.	Läst Name	First Name	Contact Id	Status				
Recent History				Inactive × ^				
Contact	Customer Id	Customer Name	Branch	Active				
Susan Billiar Visifile / 2176				Any				

Use the status dropdown option under the basic search to choose either inactive or any. Inactive will search only for inactive contact records in your system. Any will search for contact records whether they are deactivated or not.

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