

Beyond - Deactivating Contact Records

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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 in case 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 visible or the details tab find the status field

CONTACT Global / Jameson O'Leary, Buy N Large

O'Leary, Jameson (11970)
Janitor · SAINT PAUL, MN 55106-5255

VISIFILE DETAILS ▾ DOCUMENTS MESSAGES CUSTOM DATA

Title	Janitor
Branch	Minneapolis
Status	Active >

^ Note

^ Contact Information

(651) 555-4545
Office Phone

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

Change Status ✕
O'Leary, Jameson (11970)

Inactive ▾

Feel free to use any of the following actions, and then save the new status.

ACTIONS

CREATE MESSAGE 🔗

CREATE TASK 🔗

SAVE STATUS

- You may be asked or required to complete additional actions depending on your [Status Change Workflow](#), we recommend logging a message stating why you are deactivating the record so that it is saved

Compose Message

* Message
Jameson no longer works for Buy N Large

* Action
Deactivate ▾

Additional Linked Entities +

CANCEL **SUBMIT**

- 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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Inactive
Currently inactive.

VISIFILE DETAILS ▾ DOCUMENTS MESSAGES CUSTOM DATA

Snapshot

Title	Janitor
Customer	Buy N Large - Primary
Branch	Minneapolis
Company	
Status	Inactive >

Inactive contacts will not appear in the contact card on the associated customer record visifile:

CUSTOMER Global / Buy N Large - Primary

Buy N Large (4295013744)
 Primary · Cokato, MN 55321

VISIFILE DETAILS ▾ DEFAULTS ▾ DOCUMENTS INVOICE HISTORY MORE ▾

Contacts

Ben, Jerry (11458)
 Account Recievable
 (801) 555-1234

Burton, Hal (11159)
 AP
 (651) 651-5510 HalBurton@xip.com

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:

BASIC	ADVANCED
Last Name	First Name
Contact Id	Status
Customer Id	Active
	Active
	Inactive
	Any

^ FEWER

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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