Quick Topic - Contact Management in Unanet: Inactivation vs. Deletion

Title: Contact Management in Unanet: Inactivation vs. Deletion

Brief description:

When a contact is no longer current or valid for an organization, you have the option to either inactivate the contact or delete it from your system entirely. This Quick Topic reviews these options in detail, and offers Unanet's suggested best practices for managing contacts.

What's covered in this document:

- Roles
- Inactivating a Contact
- Deleting a Contact
- Additional Information

Roles

The Unanet roles that can search, view, edit, and delete Organization Contacts are the **Administrator**, **P&R Administrator**, **AP Admin**, **AR Admin**, **GL Admin**, **Contact Manager**, and **Contact Viewer**.

Available actions can be further restricted for the **Contact Manager** and **Contact Viewer** roles via the Organization Access configuration.

Inactivating a Contact

If a contact is no longer associated with an Organization, you may want to keep their contact information on file for various reasons, including but not limited to:

- the contact has moved to another Organization in your system;
- the contact is someone you wish to remain in contact with;
- there is historical data associated with the contact.

To retain the contact's information and all associated data throughout your system, we recommend inactivating the contact. This will allow the contact to appear in search results and reports, and gives you the ability to reactivate them without rebuilding the entire Contact profile. Note that inactive contacts do not count toward your Unanet user count.

To inactivate a contact:

1. Go to **Organizations > Contacts** and search for the contact by Org Code or Last Name.

2. Click the pencil icon to edit the desired contact record.

3. Uncheck the "Active" box in the upper left corner.

4. Click **Save**.

NOTE: If a contact is assigned as the Bill To, Ship To, or Remit To contact for an Organization, you will need to reassign another contact as the default for the Organization BEFORE inactivating them.

Deleting a Contact

If a contact is no longer associated with an organization, and you do not wish to maintain their data for one of the reasons listed above, you have the option to delete the contact from your system. Please note that deletion is a <u>permanent</u> removal of the contact and all of their associated data from your system; the data cannot be recovered once you have deleted it.

To delete a contact:

1. Go to **Organizations > Contacts** and search for the contact by Org Code or Last Name.

2. Click the trash can icon to delete the desired contact record.

3. The Unanet system will ask you to confirm that you want to delete the contact record.

4. Click **OK** to delete.

Additional Information

Help Docs - Organization - Contacts