

# 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When a contact is no longer current or valid for an organization, you have the option to either inactivate the contact or delete it from your system entirely.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.

Search List

Save Criteria Contact

SAVED LIST: <Default List>

CONTACT: CUSTOMER-4 Doe Doe, Jane

ORG. CODE LAST NAME

Show Org. Codes in filter only

Include inactive contacts in filter

Include active contacts in output

Include inactive contacts in output

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

Save Criteria Contact

NAME	TITLE	ACTIVE	CONTACT ORG	PHONE #	E-MAIL	PRIMARY	ADDRESS	DEFAULT CONTACT FOR
Doe, Jane	Accounting Manager	<input checked="" type="checkbox"/>	CUSTOMER-4	4435551234	jane.doe@customer4.com		PO Box 1234, Annapolis MD 23456, United States	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>

Total Contacts: 1

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

Organizations – Edit Contact

ACTIVE [ Categorize ]

Salutation:

\*Name:    
First MI Last Suffix

Title:

Comments:

\*Contact Org: CUSTOMER-4 - Customer 4

Default Contact For:  Bill To  Ship To  Remit To

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CONTACT INFO

*PHONE #	*TYPE	PRIMARY	*E-MAIL	*TYPE	PRIMARY
<input type="text" value="4435551234"/>	Business	<input checked="" type="checkbox"/>	<input type="text" value="jane.doe@customer4.com"/>	Business	<input checked="" type="checkbox"/>

STREET ADDRESS	CITY	STATE OR PROVINCE	POSTAL CODE	COUNTRY	*TYPE	PRIMARY
<input type="text" value="PO Box 1234"/>	Annapolis	MD	23456	United States	Business	<input checked="" type="checkbox"/>

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\* Indicates required field

4. Click **Save**.

Organizations – Edit Contact

ACTIVE [ Categorize ]

Salutation:

\*Name:    
First MI Last Suffix

Title:

Comments:

\*Contact Org: CUSTOMER-4 - Customer 4

Default Contact For:  Bill To  Ship To  Remit To

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CONTACT INFO

*PHONE #	*TYPE	PRIMARY	*E-MAIL	*TYPE	PRIMARY
<input type="text" value="4435551234"/>	Business	<input checked="" type="checkbox"/>	<input type="text" value="jane.doe@customer4.com"/>	Business	<input checked="" type="checkbox"/>

STREET ADDRESS	CITY	STATE OR PROVINCE	POSTAL CODE	COUNTRY	*TYPE	PRIMARY
<input type="text" value="PO Box 1234"/>	Annapolis	MD	23456	United States	Business	<input checked="" type="checkbox"/>

Created by Controller: Frank T. (fcontroller) on 1/28/2019 Last modified by Controller: Frank T. (fcontroller) on 1/28/2019

\* Indicates required

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 permanent 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.

Search List

Save Criteria + Contact

SAVED LIST: <Default List>

CONTACT: CUSTOMER-4 Doe

ORG. CODE LAST NAME

Show Org. Codes in filter only  
 Include inactive contacts in filter

Include active contacts in output  
 Include inactive contacts in output

Doe, Jane

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

NAME	TITLE	ACTIVE	CONTACT ORG	PHONE #	E-MAIL	PRIMARY ADDRESS	DEFAULT CONTACT FOR			
							BILL TO	SHIP TO	REMIT TO	
	Doe, Jane	Accounting Manager	✓	CUSTOMER-4	4435551234	jane.doe@customer4.com	PO Box 1234, Annapolis MD 23456, United States	✓	✓	✓

Total Contacts: 1

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

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Are you sure you want to delete contact Doe, Jane?

OK Cancel

- Click **OK** to delete.

## Additional Information

[Help Docs - Organization - Contacts](#)