Tip of the Week: Difference between deleting and deactivating a Client, Matter, or Professional

TimeSolv users often call in struggling to delete a Client, Matter, or Professional from the system. The issue usually lies in the fact that there is a lot of data attached to that entity, and the system does not allow for it to be deleted until all that data is disassociated with it. This can become a seemingly impossible task for an old Client, Matter, and Professional. The solution we offer is to simply set their status as 'inactive' instead. This way, if it's a Professional you won't be paying for them, and you will not be seeing their name, or Client or Matter name, pop up again in the system for use in any form of data entry. It's pretty simple. This week's Tip of the Week will walk you through how to deactivate these.

Deactivate Client

To deactivate a Client, click under *Clients>Clients & Mattters>[Client name]* and ensure the Client status is set to '**Inactive**'.

Deactivate Matter

To deactivate a Matter, click under *Clients>Clients & Mattters>[Matter name]* and ensure the 'Active?' checkbox is unchecked.

Deactivate Professional

Click under *Account*>*Professionals*>*[name]* and select '**Inactive**' under the 'Status' field.

If you'd like more help on understanding the difference between deleting and deactivating Clients, Matters, and/or Professionals, please call us at 1.800.715.1284, email us at support@timesolv.com or Contact support.

Contact support