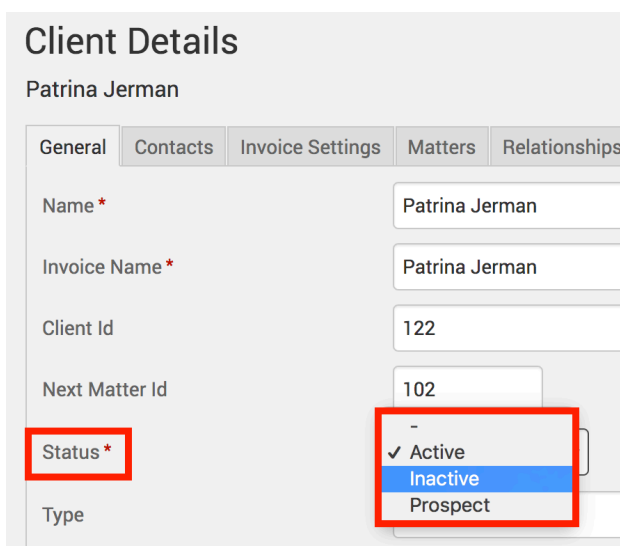


# Tip of the Week: Inactivating Clients and Matters

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TimeSolv users often call in struggling to delete a Client or Matter 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 or Matter. The solution we offer is to simply set their status as 'inactive' instead. This way the Client or Matter name will no longer pop up again in the system for use in any form of data entry. This week's Tip of the Week will walk you through how to deactivate Clients and Matters.

To **inactivate** a Client click under **Clients>Clients & Matters>[Client/Matter]>General>Status**.



The screenshot shows the 'Client Details' form for 'Patrina Jerman'. The 'General' tab is selected. The 'Status' field is highlighted with a red box, and its dropdown menu is open, also highlighted with a red box. The dropdown menu shows three options: 'Active' (checked), 'Inactive' (highlighted in blue), and 'Prospect'. Other fields visible include 'Name', 'Invoice Name', 'Client Id', 'Next Matter Id', and 'Type'.

Field	Value
Name *	Patrina Jerman
Invoice Name *	Patrina Jerman
Client Id	122
Next Matter Id	102
Status *	Inactive
Type	

If there are any of the following for the Client, the user will see a list of these details at the bottom of the screen before confirming they still want to go ahead with inactivating the Client:

- **Unbilled Time/Expense Entries**
- **Unpaid Invoices**

- **Opening Balance**
- **Unallocated Credits**
- **Trust Balances**

Another benefit of inactivating Clients and Matters once you are done working for them is that there's a smaller list to work through when selecting Clients and Matters during Time and Expense entries. The system can get bogged down if there are thousands of Clients and Matters to pull up.

If you'd like to contact TimeSolv support for help, please call 1.800.715.1284 or Contact support!

[Contact Support](#)