



E-Z Data recommends assigning the licenses to delete contacts with care. The right to delete contacts should be granted only to admin level users or to users with a thorough understanding of the ramifications of deleting contacts. Also, contact deletion rights should only be granted to the users that need to delete contacts. Ideally, only one user in your office will have the right to delete contacts in SmartOffice.



Setup for Deleting Contacts

To delete a contact from SmartOffice, a user must have the **Delete** option selected for **Individual and Business Contacts** on the **Module Access Control** tab in **User Administration**.

Office Administration - SOOTraining Office

Detail (P) Licenses User Groups Users List Department/Team Hierarchy User Creation Default Settings >>

User Administration - Daniel Odell

Summary Detail (P) User Roles/Licenses **Module Access Control** User Preferences Current User Proxies For >>

| Module | Add | Modify | Delete | Report | Read-Only |
|------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|
| Advisor | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Calendar Activity | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Dynamic Reports | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Filter | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Individual Policy | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Individual Product | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Individual/Business Contact | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Insurance Carrier | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Investment | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Marketing Campaign | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Model Allocations | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Opportunity | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Pending Case Management | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Security Master | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

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Figure 1: The Module Access Control tab.

To delete multiple contacts at once, a user must have the **Mass Deletion** option selected in the **Mass Operation** section of **User Roles** on the **User Roles and Licenses** tab of **User Administration**.

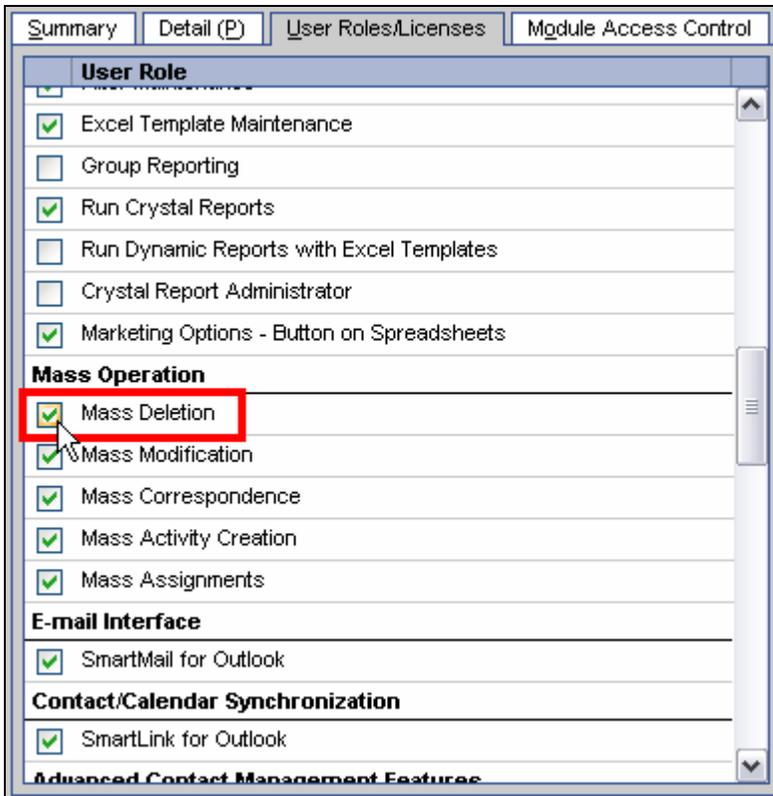


Figure 2: The User Roles and Licenses tab.

To Delete a Contact Record:

- Tag a contact record in a contact summary screen or open the detail tab of a contact record.
- Click the **Delete** button in the toolbar.



Figure 3: The Delete button in the Individual/Business Summary screen toolbar.

- SmartOffice will prompt you to confirm the deletion.
- Once the deletion has been confirmed, SmartOffice will move the deleted contact to the **Summary of Deleted Contacts**.

Important Note: Contacts with linked policies, investments, or designated as the Head of a Household in SmartOffice cannot be deleted. All linked policies and investments must be reassigned or deleted and the Head of Household designation will need to be reassigned or the Household will need to be deleted before the contact can be deleted.

Restoring Deleted Contact Records

A user with admin rights will be able to restore a deleted contact from the **Deleted Contact Summary**.

- Select **Data Maintenance** in the main menu.
- Select **Deleted Contacts** in the **Data Maintenance** menu.
- Perform a search for the deleted contact.
- All deleted contacts meeting the search criteria will be displayed in the **Summary of Deleted Contacts**.
- Tag the contact to be restored and click the **Restore Tagged Contact** button.
- The contact will be restored to SmartOffice.

Note: Contact SmartPad™ records will be restored with restored contact records. However, any links with polices, investments, key relations, and households will need to be recreated.

To permanently delete contacts from SmartOffice, tag records to be permanently deleted and click the **Delete Tagged Records Permanently** button in the toolbar of the **Summary of Deleted Contacts**.

For SmartOffice Only Users Only:

Deleted contacts will be automatically cleared from the Summary of Deleted Contacts after 30 days.

