

CCH iFirm Learning Portal

Delete, Archive, and Merge Contacts

There are various security roles surrounding Contacts. When creating a general user, it is advised that users be granted the security role: Contacts – View Only. All users at a bare minimum need to be able to access the contacts, even if they are not allowed to make changes. However, if a user will need to perform any type of maintenance on the contact records they will need the added contact security roles.

The list of contact security roles consists of:

- Contacts – View Only
- Contacts – View, Add, and Edit Contacts
- Contacts – Edit Contacts in Bulk
- Contacts – Archive and Delete Contacts

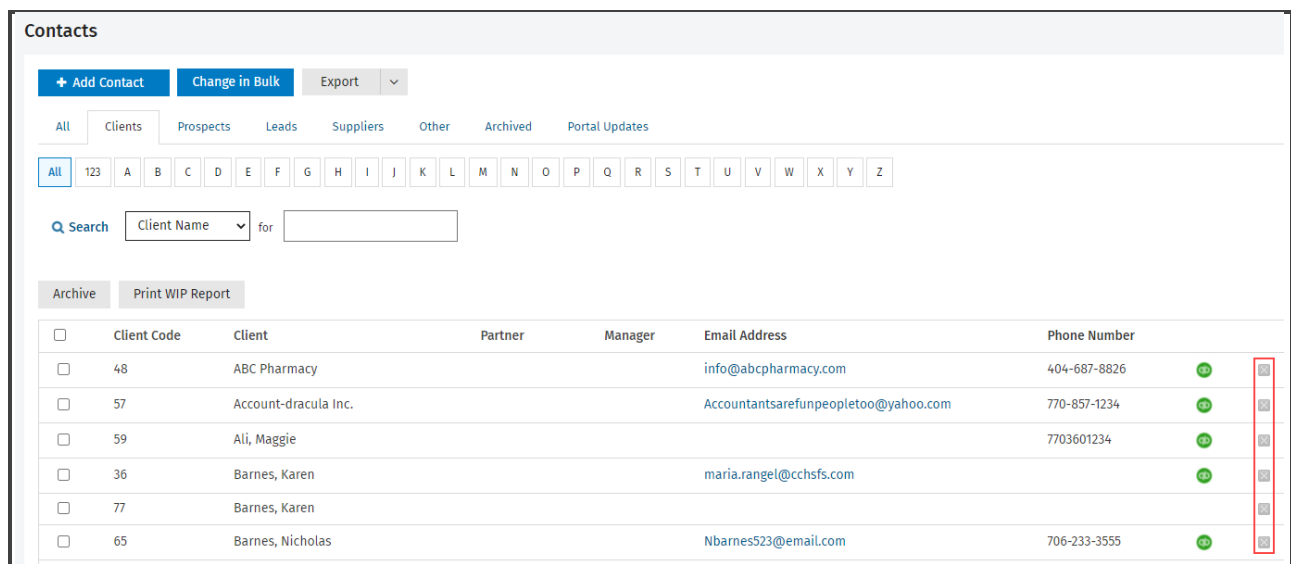
To remove a contact, you can either delete it or archive it. When you delete a contact, the contact record is permanently removed from CCH iFirm. When you archive it, the contacts record is simply deactivated.

Deleting Contacts













When deleting contacts, keep in mind that you have to delete contacts one at a time. You cannot delete contacts in bulk.

To delete contacts:

1. Log in as a general user with the security role *Contacts – Archive and Delete Contacts*.
2. From the Contacts page, click the x at the end of the contact record line.



The screenshot shows the 'Contacts' page in the CCH iFirm system. At the top, there are buttons for '+ Add Contact', 'Change in Bulk', and 'Export'. Below these are tabs for 'All', 'Clients', 'Prospects', 'Leads', 'Suppliers', 'Other', 'Archived', and 'Portal Updates'. A search bar is present with a dropdown for 'Client Name' and a text input field. Below the search bar are buttons for 'Archive' and 'Print WIP Report'. The main part of the page is a table with the following columns: Client Code, Client, Partner, Manager, Email Address, and Phone Number. The table contains six rows of contact data. In the rightmost column of each row, there is a green status icon and a small 'X' icon. A red rectangular box highlights these 'X' icons for the first five rows of the table.

<input type="checkbox"/>	Client Code	Client	Partner	Manager	Email Address	Phone Number	
<input type="checkbox"/>	48	ABC Pharmacy			info@abcpharmacy.com	404-687-8826	 
<input type="checkbox"/>	57	Account-dracula Inc.			Accountantsarefunpeopletoo@yahoo.com	770-857-1234	 
<input type="checkbox"/>	59	Ali, Maggie				7703601234	 
<input type="checkbox"/>	36	Barnes, Karen			maria.rangel@cchfs.com		 
<input type="checkbox"/>	77	Barnes, Karen					 
<input type="checkbox"/>	65	Barnes, Nicholas			Nbarnes523@email.com	706-233-3555	 

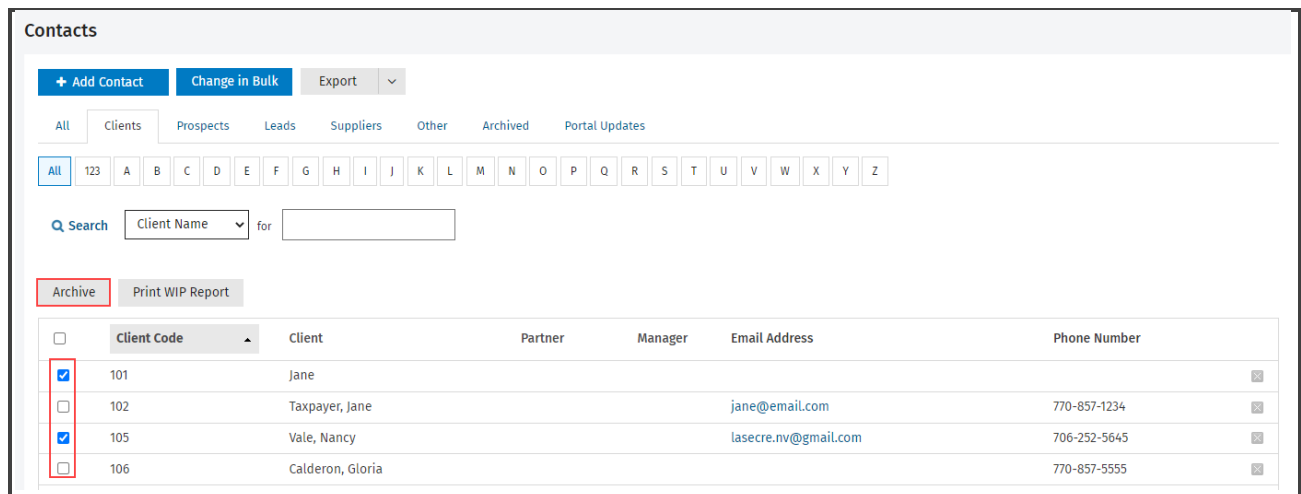
- i** Note that you cannot delete a contact record that has entries in the Practice Management or Client Portal modules. For example, if the contact has a Job in Practice Management, you will not be able to delete to contact, but will have to archive it instead.

Archive Contacts

It is a good idea to archive clients that are no longer a client of yours. This gives you the ability to reinstate them at a later time if they return to your firm.

To archive a contact :

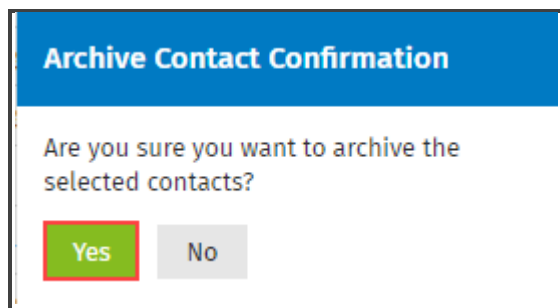
1. Log in as a general user with the security role *Contacts – Archive and Delete Contacts*.
2. From the Contacts page, select the contact(s) you want to archive using the checkbox(es) to the left of each contact and click **Archive**.



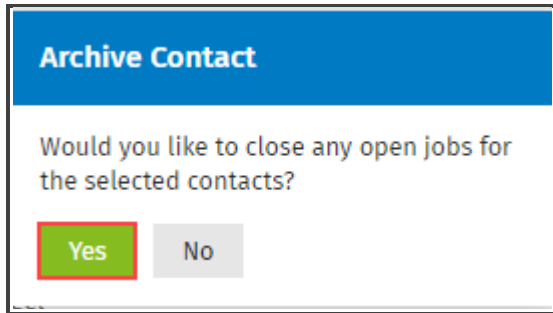
The screenshot shows the 'Contacts' page in CCH iFirm. At the top, there are buttons for '+ Add Contact', 'Change in Bulk', and 'Export'. Below these are tabs for 'All', 'Clients', 'Prospects', 'Leads', 'Suppliers', 'Other', 'Archived', and 'Portal Updates'. A search bar is present with a dropdown for 'Client Name' and a text input. Below the search bar are buttons for 'Archive' and 'Print WIP Report'. The main area is a table with columns: Client Code, Client, Partner, Manager, Email Address, and Phone Number. The table contains four rows of data. The first row (Client Code 101, Client Jane) has its checkbox selected. The second row (Client Code 102, Client Taxpayer, Jane) has its checkbox unselected. The third row (Client Code 105, Client Vale, Nancy) has its checkbox selected. The fourth row (Client Code 106, Client Calderon, Gloria) has its checkbox unselected. The 'Archive' button is highlighted with a red box, and the checkboxes for the first and third rows are also highlighted with red boxes.

<input type="checkbox"/>	Client Code	Client	Partner	Manager	Email Address	Phone Number
<input checked="" type="checkbox"/>	101	Jane				
<input type="checkbox"/>	102	Taxpayer, Jane			jane@email.com	770-857-1234
<input checked="" type="checkbox"/>	105	Vale, Nancy			lasecre.nv@gmail.com	706-252-5645
<input type="checkbox"/>	106	Calderon, Gloria				770-857-5555

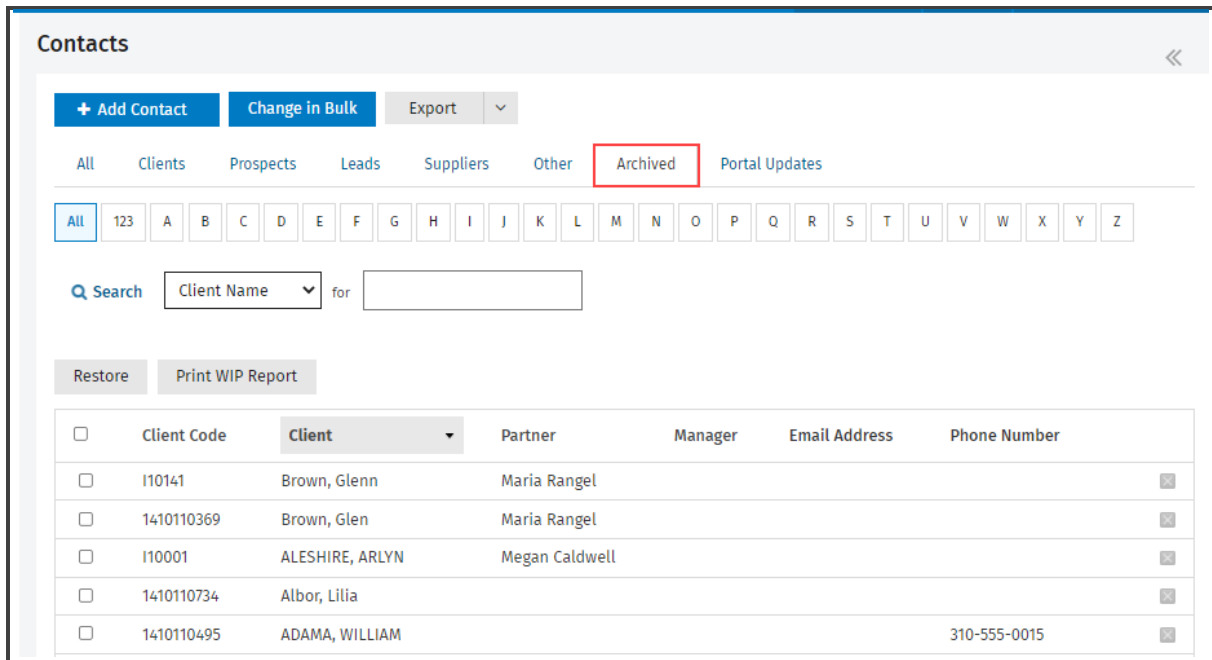
3. CCH iFirm displays the Archive Contact Confirmation dialog box. To proceed with the archive, click **Yes**.



4. If open jobs exist for the selected contacts, you will be asked if you want to close any open jobs for the selected Contacts. Do one of the following:
 - Click **Yes** –Closes any open jobs for the selected contact and proceeds to archive the contact record.
 - Click **No** – Suspends the archiving, giving you the opportunity to review the jobs, and determine if you indeed want to proceed with archiving the record.
5. For this lesson, click **Yes** to proceed.



- CCH iFirm archives the contacts. Archived contacts can be accessed from the Archived tab on the Contacts page.



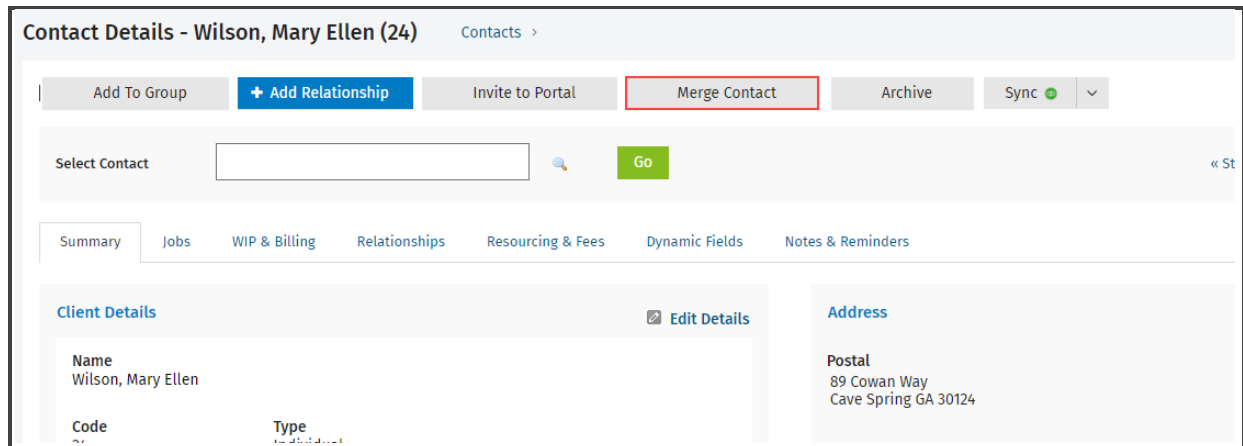
Merge Contacts

If you have more than one record for the same contact, you can merge these duplicate records into one. When you do this, the contact you open is merged to the one you select. This means that all notes and transactions for the first contact are moved to the second contact. All other data for the first contact is deleted.

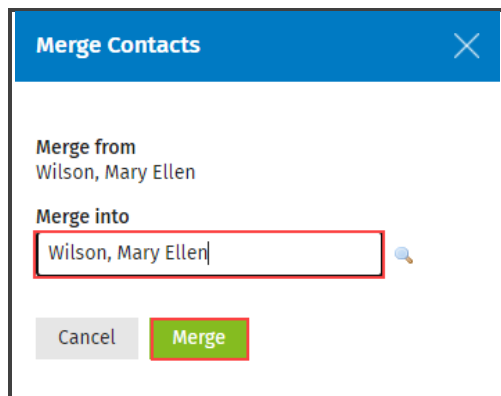
i Once you have merged contact records this action CANNOT be undone.

To merge contacts :

- Log in as a general user with the security role *Contacts – View, Add and Edit Contacts*.
- From the Contact page, open the contact record you wish to delete.
- From the Contact Details page, click the **Merge Contact** button.



4. On the Merge Contacts Dialog box, select the contact you want to merge this contact to, and click **Merge**.



5. CCH iFirm displays the Merge Contacts dialog box, here you see the Warning as reminder that the merge cannot be undone.
6. The following records will be moved:
 - Jobs
 - Invoices
 - Disbursements
 - Receivable Transactions
 - Portal Documents
 - Ledgers
7. Click **Yes** to proceed.

Merge Contacts

Warning: Once merged the two contacts cannot be separated again.

The following records will be moved from 'Wilson, Mary Ellen' to 'Wilson, Mary Ellen':

- Jobs
- Invoice
- Disbursements
- Notes
- Receivable Transactions
- Portal Documents
- Ledgers

All other data associated with 'Wilson, Mary Ellen' will be deleted.

Are you sure you want to continue?

8. Once the merge is complete, CCH iFirm opens the contact record that received the information.

Contact Details - Wilson, Mary Ellen (90) Contacts >

Select Contact « Start < Previous Next > End »

<p>Client Details <input type="button" value="Edit Details"/></p> <p>Name Wilson, Mary Ellen</p> <p>Code 90</p> <p>Type Individual</p> <p>Date of Birth Sep 19 1955 (Age 66)</p> <p>SSN 303-00-3566</p> <p>Tax Year End January</p> <p>Annual Accounts Month None</p>			<p>Address <input type="button" value="Edit Details"/></p> <p>Postal 89 Cowan Way CAVE SPRING GA 30124</p>
<p>Recent Notes <input type="button" value="Add Note"/></p> <p>There are no notes for this client.</p>			