



Archiving Contacts

You have the option to archive contact records in the Total Expert platform. This means that while associated information, such as loan data or email statistics, is retained, the contact is removed from all available communication channels and is hidden from the contact list.

Archiving a contact is generally meant to be used when you no longer expect to have any contact with a person, such as when they have passed away or when you find you are completely unable to contact them. While the process is reversible, it is generally expected to be permanent.

Warning

Do not archive a contact who is still being actively worked in a loan origination system (LOS). Updates from the LOS will not trigger actions to a contact that is archived in TE.

Note

The features described in this document are controlled by permission. If you do not see an option you expect, contact your system administrator.

Archiving a Contact

There are 3 ways of archiving a contact. All of them begin with navigating to **Leads & Contacts → Contacts**.

1. To archive 1 or more contacts:
 - a. Check the boxes for the contacts you want to archive.
 - b. Select **Actions → Archive Selected Contacts**.
2. To archive a single contact from the contacts list:
 - a. For the contact you want to archive, select the ellipsis menu [...] → **Archive Contact**.
3. To archive a single contact from their contact details page:
 - a. Click the contact's first name to open the contact details page.
 - b. Select **Actions → Archive Contact**.

Note

You can only archive contacts you own or who have been assigned to you. If a contact is merely shared with you, the option to archive will not appear in the menus in options 2 and 3 above. If any of the contacts you select in option 1 are not available for you to archive, you will be notified in the ensuing dialog box.

Regardless of which option you use, you will see a dialog box summarizing the action you are about to take. This includes a statement of how many of your selections you are not able to archive, if any (and how many will be archived by proceeding). You can optionally select a reason for archiving the contact(s) from the drop-down menu. Click the **Archive** button in the dialog box to complete the action.

Note

The system is limited to archiving no more than 500 contacts at a time. If you bulk select more than 500 contacts and attempt to archive them, you will see a message alerting you to reduce your selection before you can proceed.



Effects of Archiving

Once you have successfully archived the contact(s), the contact list refreshes. Archived contacts are no longer listed here and are not counted in the total at the bottom of the page. In addition, archived contacts:

- will receive no new automated communications (print, SMS, email); however, they would receive any previously defined mailing orders that included them.
- will no longer appear in Daily Digest emails.
- are archived for anyone who had access to see the contact (including co-marketing partners).
- are not counted among group membership totals at **Leads & Contacts → Groups**.
 - Groups are still associated with an archived contact record so they are properly re-applied if the contact is ever un-archived.
- still appear as they would have before archiving on the loans list, loan details, Activity Stream, and email stats pages, but the label **(Archived)** appears with their name in each case.
- will not be returned in contact search results or the lists of possible recipients when sending an email or setting up a print order.
- will not be activated if matching information comes in through a single property site, lead capture app, or lead parsing email. A new contact is created instead.

Viewing Archived Contacts

You can review the list of all contacts you have archived (as well as those visible to you who were archived by another user). Navigate to **Leads & Contacts → Archived Contacts**.

This list view is very similar to the standard contacts list. There is also an additional column listing the reason given (if any) for archiving each contact. Searching, sorting, and column visibility options are the same, as is the Reset button. Filtering works the same way, though the available options for filtering are reduced. The principal difference is that there are no options or actions available for the listed contacts.

As with the standard contacts list, you can click the first name of an archived contact to view details for that contact. This is generally similar to the standard contact details page, except that options are greatly reduced. For example, you cannot edit contact information, modify group assignments, or add new tasks or notes. You do have some limited actions, such as adding an appointment. There are no Actions or Quick Notes menus.

The main action you are left with for an archived contact is simply to un-archive the contact by clicking the **Activate** button at the top of the page. You will then have to click the **Activate** button in the confirmation box to complete the action.

Note

You can only activate contacts you own or who have been assigned to you.

When a contact is un-archived, they are restored to the main contacts list and any groups they belonged to before being archived. Any campaigns they had been in when archived are *not* restarted.