

Deleting Contacts

DELETING A CONTACT OR ADDRESS

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The **Contact → Delete/Delete Address** option allows you to select a particular contact or contact's address to be removed from your database. Oftentimes, multiple contact names and/or addresses are entered in error and need to be consolidated or deleted entirely.

1. Launch the **Contacts** Module.
2. In the **Form** view, search for the contact/address you would like to delete.
3. From the Menu Bar select **Record→Delete Contact** or **Record→Delete Address** depending upon what needs to be deleted.
4. A window will appear asking for confirmation on deletion of the contact/address.
5. Select **OK**.
6. Your Contact/Address has been deleted

Note: *Artsystems* databases are relational databases and some fields may be linked to an associated record in the database. To protect the integrity of the database, deletion will not be possible if a record is linked to another. When attempting to delete Contact records a message may appear indicating that *“there are links associated with this contact/address”* or *“additional addresses are in use”*, the **associated links MUST be deleted before the contact/address record can be deleted.**

FINDING LINKS ASSOCIATED WITH A CONTACT OR ADDRESS

To find the links associated with a contact/address several steps may be necessary. Please follow the steps below in the order that they are given to determine what links may be associated with the specific record needing deletion.

FINDING AND DELETING LINKED TRANSACTION RECORDS

If the Contact record has any associated transactions (Invoice, Offer, Exhibition, Loan, Shipment, etc.) it is not advisable to remove the link because this will alter data history. However, it may be necessary to change this information when consolidating multiple contact records. The Statistics tab will show any linked Transaction records – click through the following bullets in Statistics to see the linked Transaction records: **Work History, Work Movement, Payments Received, Payments Made**. Note: The two bulleted items- **Outstanding Works** and **Collections** are linked to Work records. The Outstanding Works bullet links to a Work record to show money is due to a consignor or co-owner – adjusting the Source field on the Work record will eliminate this link (see finding links to Work records below). The Collections bullet is linked to the Provenance tab on the Work record - removing the link on the Provenance tab would remove this link.

TO FIND AND DELETE LINKED TRANSACTION RECORDS

1. Follow steps 1-2 under Deleting a Contact or Address above.
2. Select the **Statistics** Tab on the Contact record.
3. Select each of the following bullets on the top of the Statistics Tab: **Work History, Work Movement, Payments Received, Payments Made.**
4. If transactions appear on the spreadsheet below, for any of these bulleted items then there are transactions associated with this Contact.
5. Navigate to each of these transactions (double-click on the blue text). Once in the transaction select **Edit > Change Contact** from the Menu Bar.

Note: A contact other than the one to be deleted must be selected. If the contact has been entered multiple times you may want to differentiate between the records by adding a defining character to the record. **For example:** *If you have entered Jane Smith 3 x, temporarily modify the last name with Smith 1; Smith 2; etc. to avoid any confusion when attempting to select the appropriate contact. You may want to further modify the name by adding Smith 2 DELETE to indicate which record it is you would like to delete*

TIP: When deciding which of the 3 entries to delete, it is best to determine which one of the entries has the most 'links' associated with it and maintain that record. To do this, create a Set View in Works and/or Transactions.

6. Once the Contact has been changed click on the Contacts Module to continue 'unlinking' the Transactions on the Contact records.
7. Repeat steps 5 and 6 until all transactions have been removed from this contact's Statistics.
8. Once all Transactions links are removed - check the Outstanding Works and Provenance bullets to see if there are further links. Outstanding Works links will be unlinked when Source is changed (see next page), but if there are Provenance links – click on the link and remove the information in the Collection column or the Current Owner field.
9. Delete the contact/address record by going to **Record→Delete.**
10. Your contact/address record has been deleted.....**Or** if there are additional links to remove a message will appear: *“there are links associated with this contact/address”*.

FINDING AND DELETING LINKED WORKS RECORDS

If the contact you are attempting to delete is linked to any Work records in the **Location, Source** or **Co-Owner** field, the links must be found and changed before the Contact can be deleted.

TO FIND AND DELETE A WORKS LINK

1. In the Works Module, select the **Set View** icon on the Tool Bar in the **Form View**.
2. Select the **Location** Tab and select the contact to delete by typing in the first few letters of the last name in the white field provided and then clicking to the left of the name. A check mark will appear.
3. Select **OK**.
4. If a number of records appear with that contact's name, select **Edit→Change Location** and select the appropriate contact name.
5. If you receive the message '*invalid criteria*' it indicates that there are no records with that specified information. Go to the next step.
6. Select the **Set View** icon from the Tool Bar again. This time, choose the **Source** Tab.
7. Select the contact to delete by typing in the first few letters of the last name in the white field provided and then clicking to the left of the name. A check mark will appear.
8. Select **OK**.
9. If a number of records appear with that contact's name, select **Edit→Change Source** and select the appropriate contact name.
10. If you receive the message '*invalid criteria*' it indicates that there are no records with that specified information. Go to the next step.
11. Repeat steps 6-10 above for the **Co-Owner** Tab, selecting **Edit→Change Co-Owner**.
12. Once the various Set Views for the contact/address record to delete have been generated and the '*invalid criteria*' message now appears when generating any one of the Set Views instead of a spreadsheet list of works you can attempt to delete the contact/address record.
13. In the **Contacts** Module go to the contact/address record you would like to delete and select **Record→Delete**.
14. Your contact/address record has been deleted.

DELETING ARTISTS LINK IN CONTACTS

1. **Once Transactions/Works links have been eliminated**, and the Contact still will not delete, check to see if the ARTIST field (located in the lower right hand corner of the Contact form) is checked. This field links the Contact record to an artist name in Works.
2. If this field is checked - **Uncheck the ARTIST** box on the contact's record.
3. Select **Save** from the Menu Bar.
4. You can attempt to delete the contact/address record for this artist by selecting **Record→Delete**.
5. Your record has been deleted.

Note: Remember to re-associate the contact/artist link by replacing the deleted artist with the proper artist's name in the **Artist Selection** List. Clicking the Artist box in the Form view of the proper contact can also do this.

TO DELETE BLANK CONTACTS

There are times when 'blank' contact records are created. This may happen in several ways but most often occurs when a new record is entered and left blank intentionally or information has been manually deleted from the record. In either case, there are times when these 'blank' contact records inadvertently get linked to various transactions and works.

1. In **Contacts**, locate the blank contact record you would like to delete.
2. Giving the contact record a distinguishing characteristic. For example, place CONTACT TO DELETE in the Institution field so that you may be able to locate it in the Transactions and Works Modules with facility. Make sure that the Sort By Name check box is NOT checked.
3. Follow steps 1-10 in Finding and Deleting Transactions Links.
4. Follow steps 1-14 in Finding and Deleting Works links.
5. If necessary follow steps 1-5 in Deleting Artist Links in Contacts.

FINAL NOTE IN REGARD TO DELETING CONTACTS

Because of the *Artsystems* highly interlinking modules, there are times various links associated with the contact record may prevent it from being simply deleted. It may be necessary to re-create the steps above several times before being able to hone in on all links associated with the contact record you are attempting to delete

If further assistance is needed, please contact Artsystems Support.
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