

Delete and Deactivate Transactions

There may be times when we need to delete or deactivate transactions. Check out the video below to see how to Delete or Deactivate your transactions in MoxiEngage!

Delete and Deactivate Transactions

1. Open the Contact Card of the client the transaction has been added to (see below).

My People

Filter for groups, seller, missing phone numbers, saved searches... | Filters

ADD TO EXPORT REMOVE EDIT GROUPS CATEGORIZE WIZARD

Select all 80 people Sort by: Recently modified Sort order ↓

- Jen Jenna** ←
Last week | Jen Jenna - seller
Transaction moved from Pending to Deleted zone
Seller
Log activity Email Phone
- Duplicate Test**
2 week ago | Email Sent from Engage
You have sent Buy a home during a recession? to Duplicate Test sophstlwell@gmail.com
0 groups
Log activity Email Phone

Help

2. Select the transaction you wish to delete or deactivate (see below).

Jen Jenna - seller

MOVE TO ACTIVE ZONE

TASKS DETAILS

15 tasks remaining

add task

	upcoming	DUE
<input checked="" type="checkbox"/>	Schedule Pre-Listing Interview	3/20/2020
<input checked="" type="checkbox"/>	Conduct Pre-Listing Interview	3/27/2020
<input checked="" type="checkbox"/>	Schedule Property Walkthrough	3/31/2020
<input checked="" type="checkbox"/>	Create Pre-Listing Packet	4/2/2020
<input checked="" type="checkbox"/>	Research Comparison Properties	4/4/2020

3. Select the drop-down arrow in the center of the screen (see below).

back to results

marketing prospects actives pending

JEN JENNA
Buyer & Seller

add transaction

TASKS DETAILS

15 tasks remaining

add task

this week DUE

Schedule Pre-Listing Interview 3/11/2020

upcoming

Conduct Pre-Listing Interview 3/18/2020

a. If you're on the Details tab, select the delete button in the top right (see below).

marketing prospects actives pending

JEN JENNA
Buyer

add transaction

TASKS DETAILS

Property Details

delete or deactivate edit

MLS No Category buyer

Start Date March 13, 2020 Closing Date

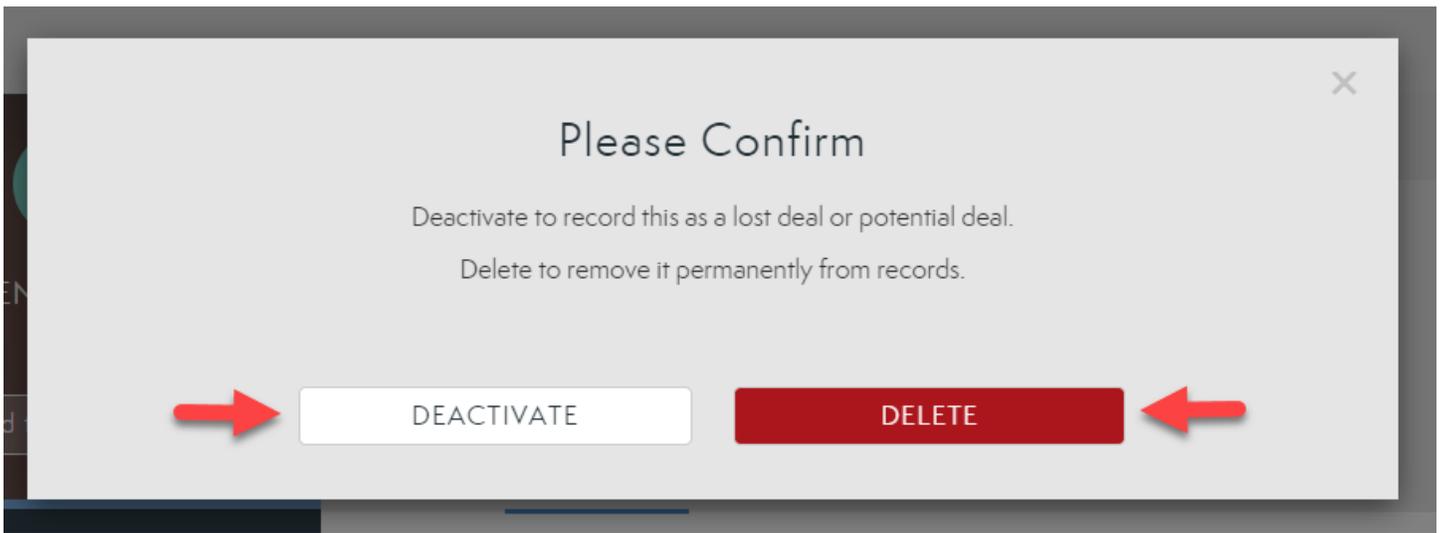
Address N/A

Area of Interest N/A Target Price N/A

Bedrooms N/A Bathrooms N/A

4. Choose if you wish to Delete or Deactivate the transaction (see below).

- a. Deleting a Transaction: Permanently removes all record of the transaction from the contact card.
- b. Deactivating a Transaction: Closes the transaction but keeps a record of it on the contact card.



5. If you are deleting the transaction, confirm your changes (see below).

