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).

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

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

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

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.

Please Confirm

Deactivate to record this as a lost deal or potential deal.

Delete to remove it permanently from records.

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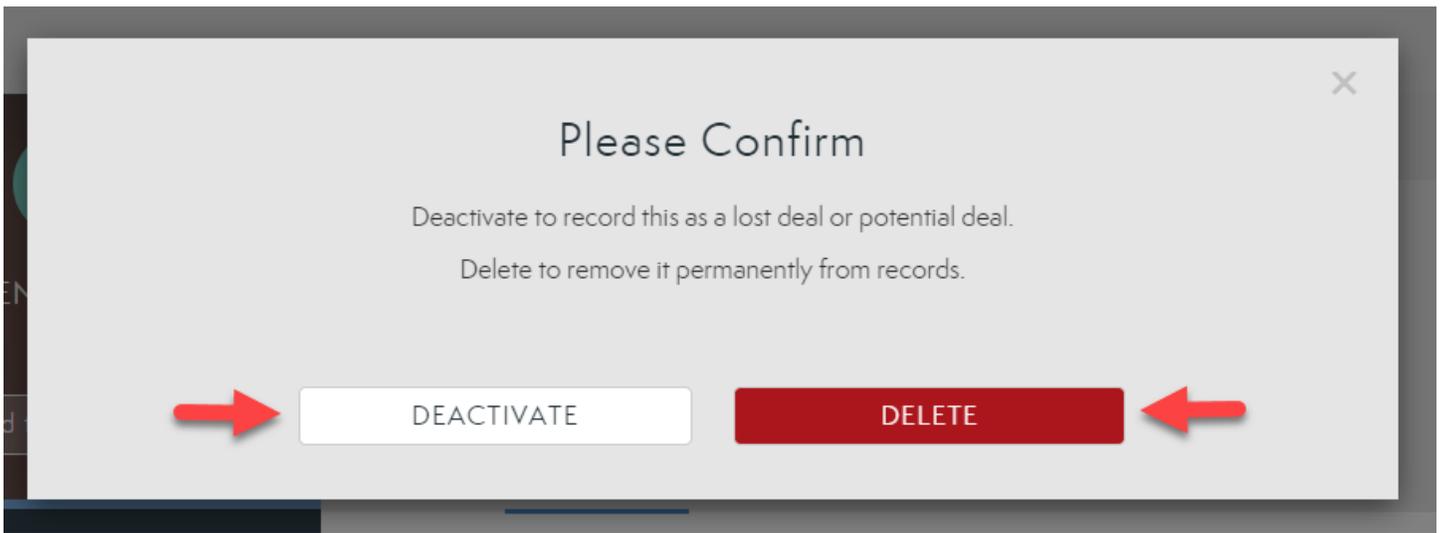
5. If you are deleting the transaction, confirm your changes (see below).

Please Confirm

You are about to permanently delete Jen Jenna - buyer. Are you ready to move forward?

Delete   Cancel