

7. How to Deactivate a Client

Sometimes you need to remove a client from active workflows—whether they’ve closed their account, gone dormant, or require review—while still retaining their history for auditing and reporting. Deactivating a client keeps their record in the system (visible to authorized employees) but prevents any new assignments to projects, desks, or tasks. You can reactivate them at any time, and every state change is fully tracked in the Logs.

To deactivate a client:

1. **Open the Clients Module** (In the left-hand nav, click **Clients** to load the client list)
2. **Find Your Client** (You can scroll, or use the **Search...** box / **Filter** drawer to locate them quickly.)

Open the Edit Drawer:

In the client’s row, click the ⇌ **Edit** icon under the **Actions** column.
This opens the Edit Client drawer on the right.

Ensure You’re on the “General” Tab: Along the top of the drawer, click **General** if it isn’t already active.

Locate the “State” Control: In the top-right corner of the General pane, you’ll see a dropdown labeled **State**.

Open the State Dropdown: Click the current value (e.g. “Active”) to expand the list of options.

Select “Deactivated”: From the dropdown, choose **Deactivated**.

Active → client can log in / be assigned.

Deactivated → client remains viewable but cannot be assigned to new work.

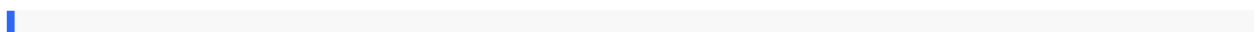
Suspended → (optional) locks the client out temporarily without full deactivation.

Save Your Changes: Click **Save** (top-right of the drawer).

A brief spinner may appear, then the drawer refreshes showing **State: Deactivated**.

Verify Deactivation: Back in the Clients list, the client’s **State** column will now read “Deactivated.”

They will no longer appear in assignment dropdowns, but their history remains for reporting and audit.



Pro Tip:

You can reactivate at any time by repeating these steps and selecting **Active**.
Use the **Logs** tab to see when and who changed the client's state.

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