Hidden Contacts

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Retire an old or misspelled contact so it stops turning up as a suggestion, without touching the transactions it's already on.

Introduction

Contact suggestions build themselves, and they never forget. A typo somebody made three years ago, an escrow officer who moved firms, an email address that started bouncing last spring: each one keeps getting offered every time anyone adds a contact.

Hiding takes an entry out of circulation. It stops appearing in suggestions from then on, and the transactions it's already sitting on don't change at all, which is the whole point. A contact on a closed file is part of that file's record. The goal isn't to erase it, it's to stop it being offered as the right answer on the next deal.

The question worth asking first is whether an entry is wrong or just finished. Someone whose details changed is usually better corrected than hidden, so the same person stays one person everywhere they appear. Hiding is for the entries nobody should be picking again, and once they're out of circulation the suggestion list reflects who your office actually works with now.

How It Works

Hiding is narrow on purpose — it changes what gets suggested, and nothing else.

What Hiding Does

A hidden contact stops appearing in the suggestions when someone adds a contact to a transaction. Everything else stays as it was: the contact remains on every transaction it's already saved on, with the same details.

Where You Do It

Click the [Gear] in the upper-right corner, then [Admin / Settings], and select [Manage Contacts] from the left menu. The page finds contacts by search rather than listing them all, so start by searching the name.

Hide or Correct?

Hide a contact when the entry itself is obsolete — an address that bounces, a firm someone left, a duplicate spelling nobody should pick again. When the person is still current and the details are wrong, correct them everywhere instead.

When a contact's email or phone number changes, a master admin can fix it once and push the correction to every transaction they're on.

See Cross-Transaction Contact Updates

Contact Roles Are Separate

Roles keep their own list of suggestions, managed on their own page — [Manage Contact Roles], in your admin settings — so hiding a contact doesn't retire the role it was using.

Hide a Contact From Suggestions

> Take an obsolete contact out of the suggestions offered when someone adds a contact.

> **Who Can Do This**: Master admins.

To hide a contact from suggestions:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings]. Select [Manage Contacts] from the left menu.
2. Search by the contact's name, then select it from the results or click [Search].
3. Click the name of the contact you want to hide.
4. Click [the hide icon] next to the contact.

The contact no longer appears in the suggestions when contacts are added to transactions. It stays on every transaction it's already on.

Hidden Contacts FAQ

Hiding a contact removes it from the suggestions without removing it from anything else. Answers to the common questions about hiding, deleting, and why a bad entry keeps coming back. See Hidden Contacts FAQ.