

How to delete a Client/Policy/Claim

To Delete a Client with No Policies

1. To delete a client that has no policies – click the hyperlink to open their address book.

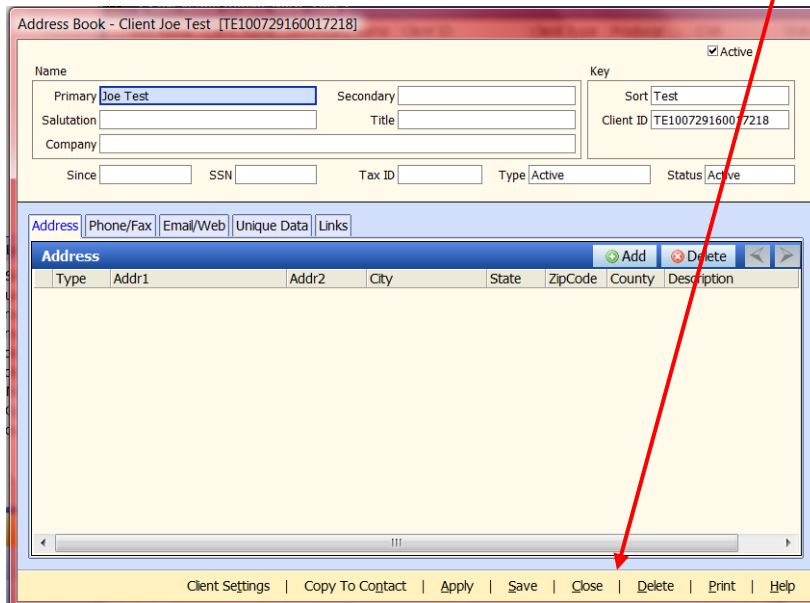
The screenshot shows the Agency Desktop interface with the following components:

- Menu Bar:** File, Edit, View, Accounting, Marketing, Tools, Action, Utilities, Communication, My Desktop, Help.
- Search Bar:** Find Sort Name That Begins With Test Search Override limit.
- Table:** (Sort Name Begins With 'Test') 2 Rows

Sort Name	Client Name	Secondary Name	Client ID	Client Type	Producer	CSR	Status	Active
Test	Joe Test		TE100729160017218	Active	Susan Gainer	Susan Gainer	Active	<input type="checkbox"/>
Test	Susan Test		TE100714145726224	Personal			Active	<input checked="" type="checkbox"/>
- System Search List:**
 - Clients by CSR
 - Clients by Number of Clair
 - Clients by Producer
 - Clients by Producer by C
 - Clients by Total Claim Am
 - Clients by Total Premium.
 - Clients Sort Name by Typ
 - Clients with Open Claims
 - Clients Without Email Add
- Client Details:**
 - Primary Address:** Joe Test
 - Contact Info:** Phone, Fax, E-Mail (ciannarino@sisware.com), Web Site.
 - Additional Contact Info:** service@sisware.com
 - Policies:**

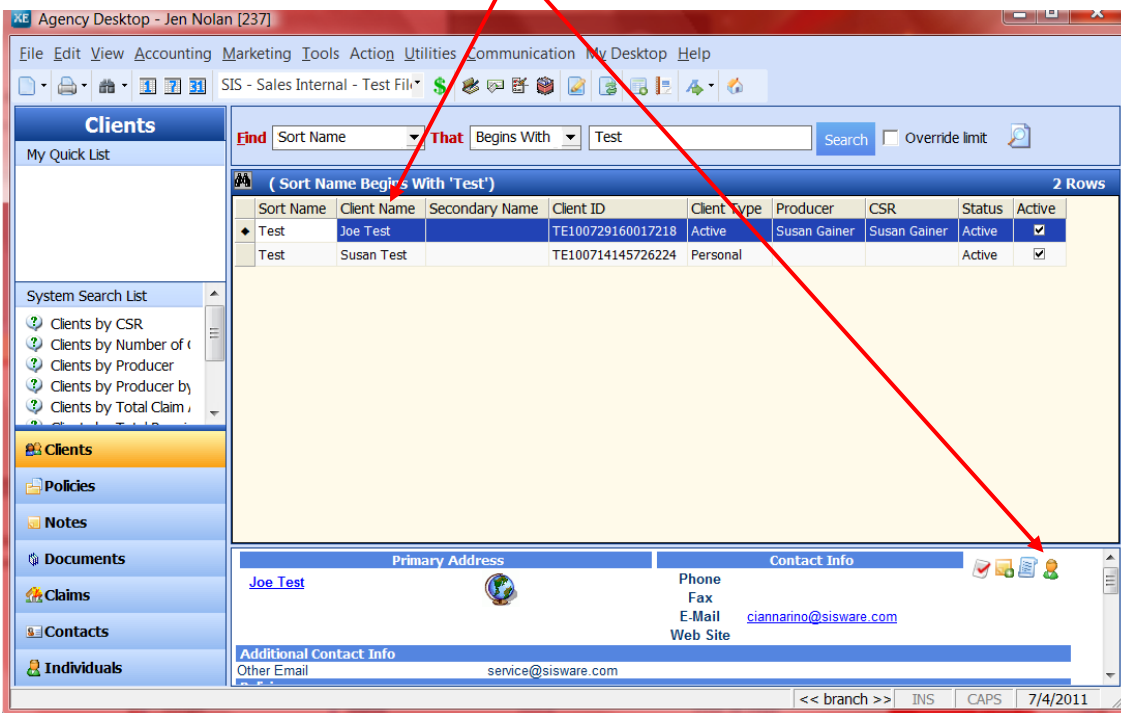
Policy ID	Status	Effective Date	Policy Type	Producer	CSR	Actions
ASSIGN201008171107455249	(Active)	8/17/2010	AUTOP	Gary P. Bower	Susan Gainer	[Icons]
ASSIGN201009031532246310	(Active)	9/3/2010	HBB	Susan Gainer	Susan Gainer	[Icons]
farm12345	(Active)	10/5/2010	PPKGE	Susan Gainer	Susan Gainer	[Icons]
Life12345	(Active)	1/27/2011	LIFE	Susan Gainer	Susan Gainer	[Icons]
massAutoB	(Active)	2/15/2011	AUTOB	Susan Gainer	Susan Gainer	[Icons]
Mobilehome1324	(Active)	1/25/2011	MHOME	Susan Gainer	Susan Gainer	[Icons]
test657568	(Active)	9/23/2010	CGL	Susan Gainer	Susan Gainer	[Icons]
testAutoB	(Active)	2/15/2011	AUTOB	Susan Gainer	Susan Gainer	[Icons]
 - Claims:** No Claim Data
 - Individuals:** Individuals
- Bottom Bar:** Ready << branch >> INS CAPS 7/4/2011

2. Next, click the Delete option at the bottom of the address book.



To Delete a Policy or a Claim

1. To delete a policy or a claim, open the client by clicking on the **Person Icon** or double-clicking on the Client Name in the search results list.



2. Next, choose either the **Policies** or **Claims** on the navigation bar.

The screenshot shows the 'Client Summary' page for 'Joe Test'. The 'Section Navigation' sidebar on the left has 'Policies' and 'Claims' highlighted with red arrows. The main content area is divided into several sections:

- Primary Address:** Joe Test
- Contact Info:** Phone, Fax, E-Mail (ciannarino@sisware.com), Web Site
- Additional Contact Info:** Other Email (service@sisware.com)
- Account Information:**
 - Producer: Susan Gainer
 - CSR: Susan Gainer
 - Accounting Contact Type: Active
 - Status: Active
 - Since: (blank)
- Balances:**
 - Current: \$0.00
 - 1 To 30 Days: \$0.00
 - 31 To 60 Days: \$0.00
 - 61 To 90 Days: \$0.00
 - Over 90 Days: \$1,000.00
 - Total Balance: \$1,000.00
- Client Accounting Settings:**
 - Terms: Net 30 Days
 - Generate Finance Charges: Yes
 - Print Monthly Statements: Yes
- Sales:**

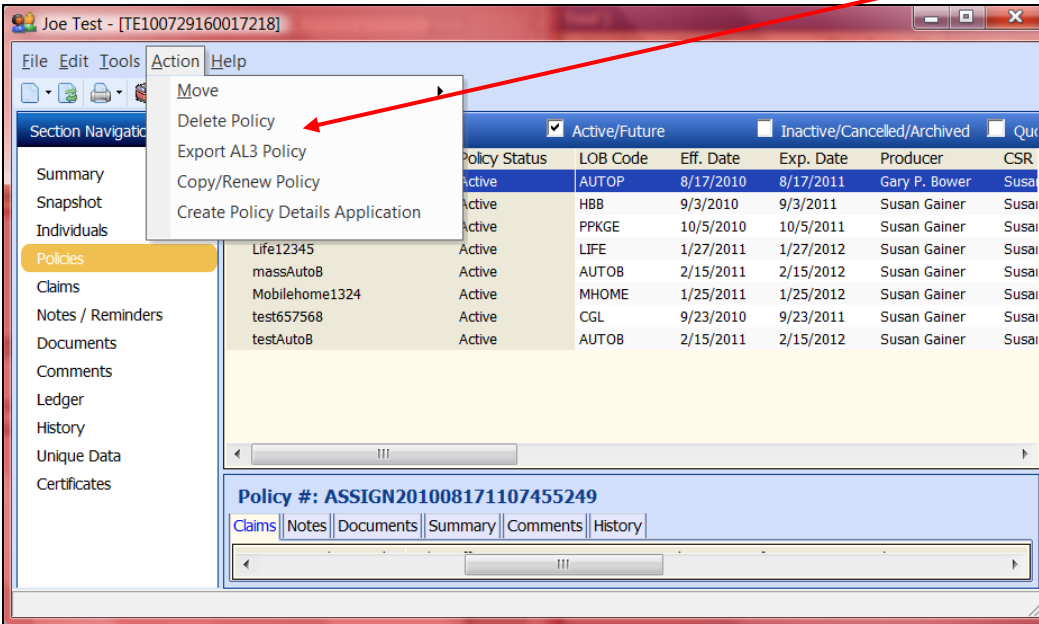
	Agency Bill	Direct Bill	Total
Year To Date	\$1,100.00	\$0.00	\$1,100.00
Future Installments	\$0.00	\$0.00	\$0.00

3. Highlight the claim or the policy you want to delete.

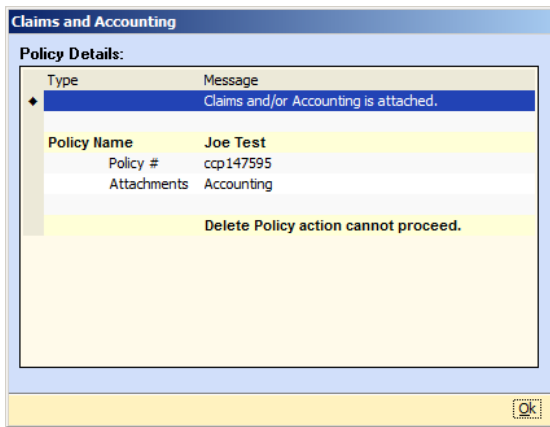
The screenshot shows the 'Policy List' page. The 'Section Navigation' sidebar on the left has 'Policies' highlighted. The main content area displays a table of policies with the following columns: Policy No., Policy Status, LOB Code, Eff. Date, Exp. Date, Producer, and CSR. The first row is highlighted.

Policy No.	Policy Status	LOB Code	Eff. Date	Exp. Date	Producer	CSR
ASSIGN201008171107455249	Active	AUTOP	8/17/2010	8/17/2011	Gary P. Bower	Susa
ASSIGN201009031532246310	Active	HBB	9/3/2010	9/3/2011	Susan Gainer	Susa
farm12345	Active	PPKGE	10/5/2010	10/5/2011	Susan Gainer	Susa
Life12345	Active	LIFE	1/27/2011	1/27/2012	Susan Gainer	Susa
massAutoB	Active	AUTOB	2/15/2011	2/15/2012	Susan Gainer	Susa
Mobilehome1324	Active	MHOME	1/25/2011	1/25/2012	Susan Gainer	Susa
test657568	Active	CGL	9/23/2010	9/23/2011	Susan Gainer	Susa
testAutoB	Active	AUTOB	2/15/2011	2/15/2012	Susan Gainer	Susa

4. Finally, click **Action** and choose **Delete claim** or **Delete policy** from the list.



NOTE: If there are attachments to the policy or client, it cannot be deleted. A message will appear indicating that the action cannot proceed. If this message appears, the attachments will have to be moved to another policy or client before this policy can be deleted.



To move the attachments, click on Action > Move > Move Attachments. When the move is completed, go to Action > Delete.