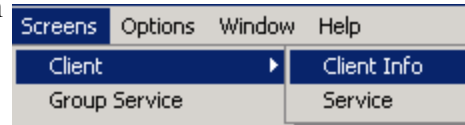


Chapter 10: Deleted Clients

A. Deleted Clients

1. To recover a deleted client go to “Screens” then “Client” then “Client Info.”
2. Choose a client when the “Client Quick Find” screen appears and click “OK.”



Client ID	Last Name	First Name	Middle Name	Status	Date of B
DAA-00-05406				Pending	
DAA-00-05411				Pending	
462-24-1052	Abby	Richard		Closed	6/30/1913
DAA-00-01845	Abdullah	Ahmad	H	Pending	6/26/1928
DAA-00-01003	Abdullah	Hasan		Active	9/27/1929
432-14-5903	Abdulmateen	Alhaji	B	Closed	5/16/1922
DAA-02-1968	Abernathy	Ann		Active	9/1/1923
DAA-00-03634	Abernathy	Ernestine		Pending	5/7/1937
386-26-8948	Abernathy	William	E.	Closed	4/12/1927

Find:

OK Cancel

Show Active Clients Only ☐

Type of Search
☒ Client Name (Last, First)
☐ Client SSN

3. Click “Insert” when the clients screen appears.
4. Search the name of the deleted client in the “Search Results” box. (ex: Haymitch & Abernathy)



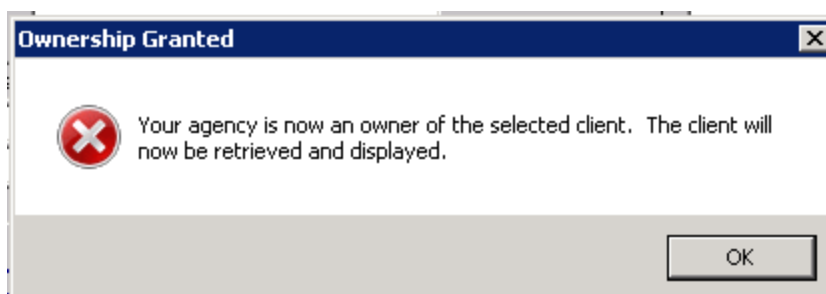
Haymitch & Abernathy

Search

5. Click “Search.”
6. When the deleted client appears in the search box, highlight their name and click “Make Owner”.

Generate Make Owner Cancel

7. An “Ownership Granted” message will appear. Click “OK.”



8. The deleted client's information will appear on screen.
9. The Client Quick find list must be manually updated after a client is retrieved. Go to "Options" then "Update Quick Find."
10. The "Global Search Results" screen roster is updated once a day, so if the client was created and then deleted he/she will not appear in "Global" Search Results" for twenty-four (24) hours.
11. Click the "Save" icon before exiting the window.

