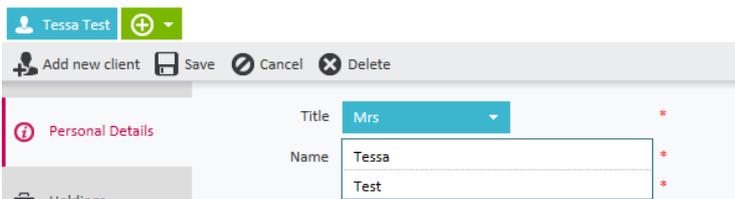


How do I delete a duplicate record?

Last Modified on 16/06/2017 12:13 pm BST

You can delete a duplicate client entries by selecting the client and then using the x at the top ribbon to delete the entry as shown below:



The screenshot shows a user interface for adding a new client. At the top, there is a user profile for 'Tessa Test' with a plus icon. Below this is a ribbon with buttons for 'Add new client', 'Save', 'Cancel', and 'Delete'. The main form area is titled 'Personal Details' and contains fields for 'Title' (Mrs), 'Name' (Tessa), and 'Test'. Each field has a red asterisk indicating a required field. There is also a 'Holdings' section partially visible at the bottom.

You will be given a warning prompt to confirm that you really want to delete the client entry. Deleted entries cannot be brought back to the system and by deleting the client, you also delete all of their holdings and goals information as well (as well as all the reporting).

To delete any holding or goal information, navigate to the correct area and delete the entry by selecting the x symbol as illustrated below:

Goal Details				Investment Details				Add +
Goal Name	Target	Type	Review Date	Term	Remaining	Attitude to Risk	Holdings	
Child care fees	£10,000.00	Income	16/05/2018	1 years			0 holdings	 
Wedding	£15,000.00	Lump sum	09/05/2023	6 years			1 holding 	  