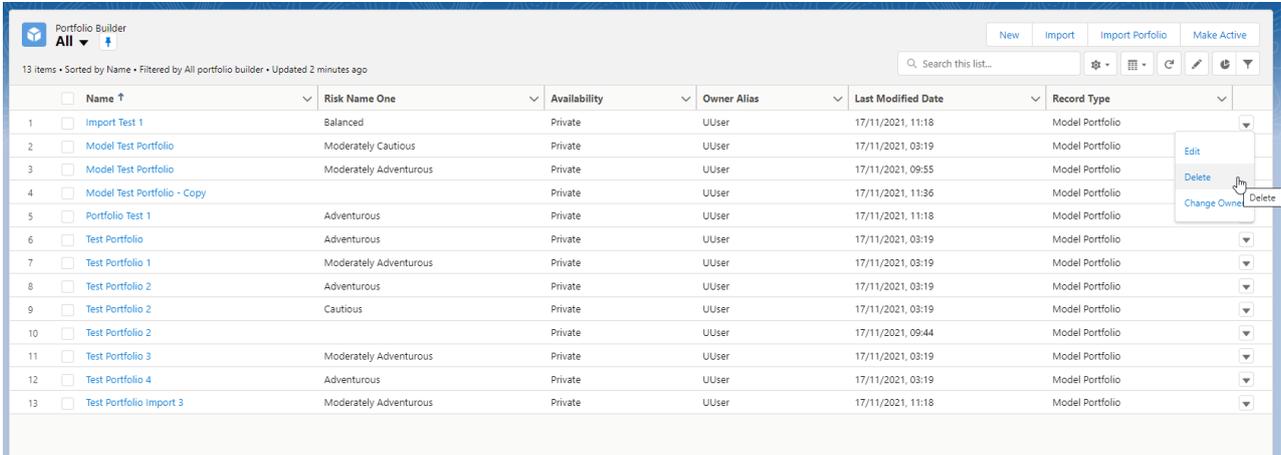


Can I delete a portfolio?

Last Modified on 23/04/2024 11:48 am BST

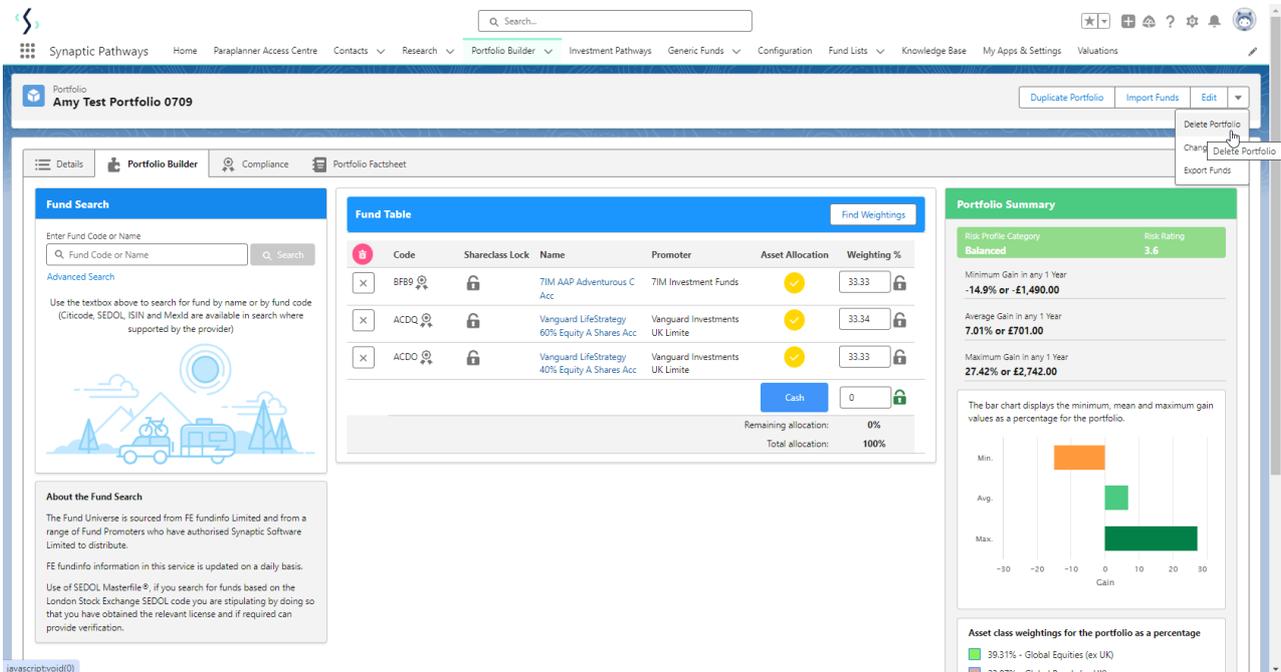
You can delete the portfolio from the Portfolio screen:



Are you sure you want to delete this Portfolio?



You can also delete from within the portfolio:



If you have used the portfolio against a client activity (for e.g. an Illustration) you will be presented with the following message:

This Portfolio is linked to one or more client activities

Select **Deactivate** if you want to keep the portfolio but prevent it from being used (Recommended)

OR

Select **Delete** if you want to permanently delete the portfolio, which means you will have to select an alternate portfolio the next time the client activity is reviewed

Deactivate

Cancel

Delete

It is best to deactivate, as this will prevent the portfolio being used but will allow the portfolio to stay linked to client activities.

If you choose to delete the portfolio, you will be prompted to select an alternative portfolio next time the client activity is reviewed.
