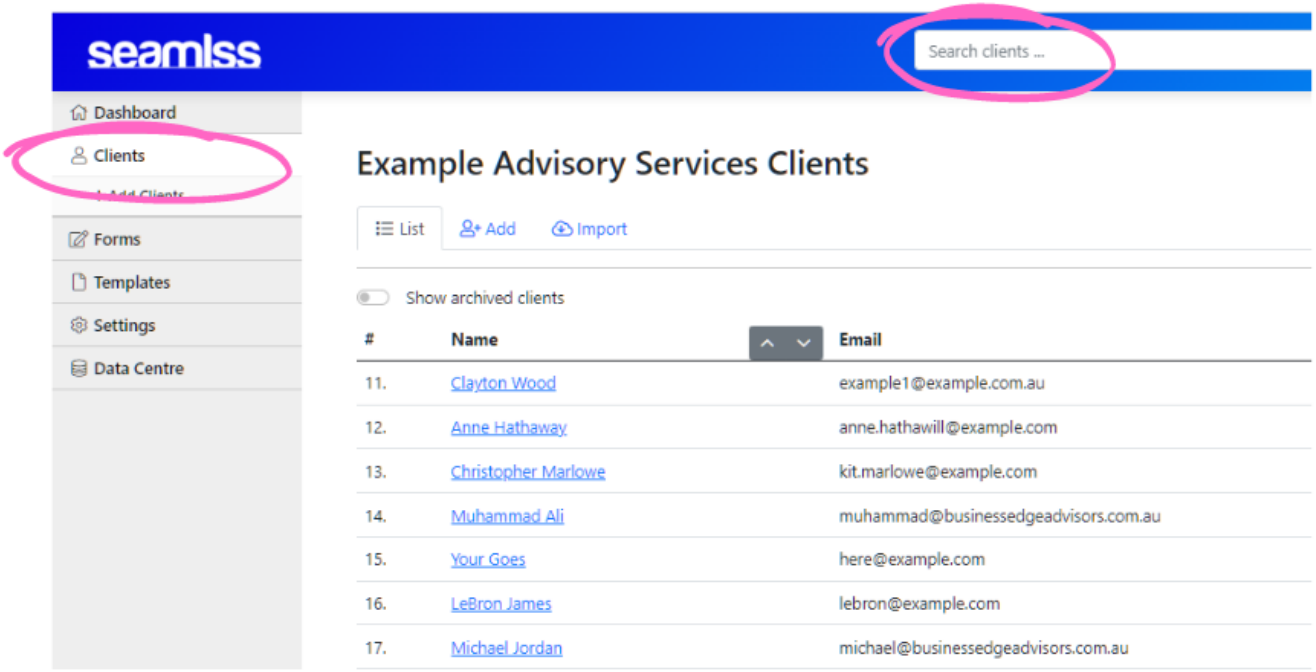
Archiving and re-instating clients

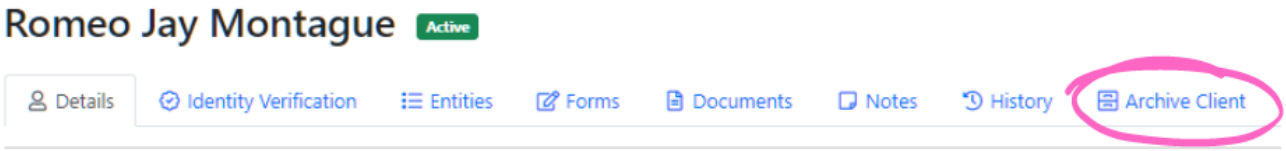
Client Records · https://seamlss.com.au/help/archiving-and-re-instating-clients/

Archiving and deleting clients

To archive a client, locate the client's record page either by selecting them from the client list or by searching for their name in the search bar at the top of the page.



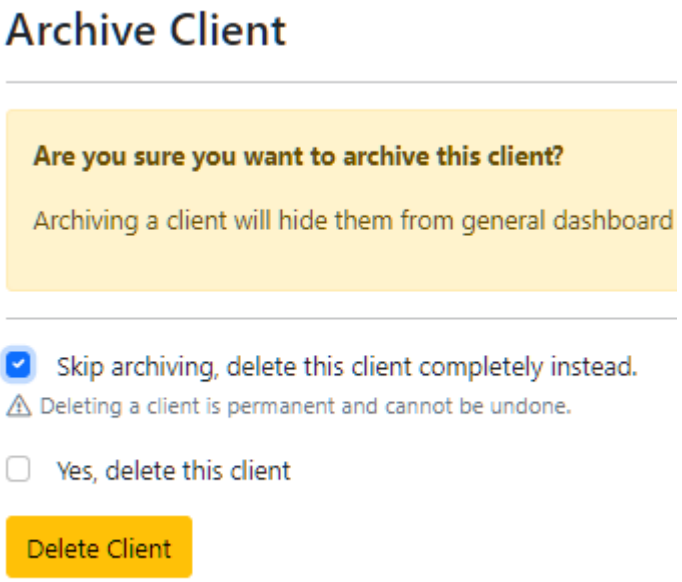
Go to the tabs at the top of the client's page and click **Archive Client**.

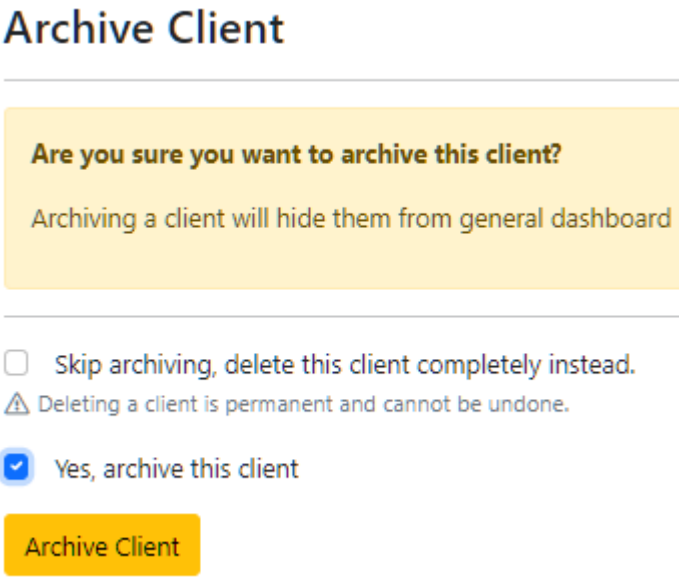


There are two options available: **delete client** or **archive client**. Deleting a client will remove all client records, it is a permenant action and cannot be undone.

Archiving a client will hide them from general dashboard operations, their data will become read-only, and the client will no longer be able to access their Client Management area. This action will be logged for audit purposes.

Tick the box for the action you'd like to take and click the yellow button to confirm.



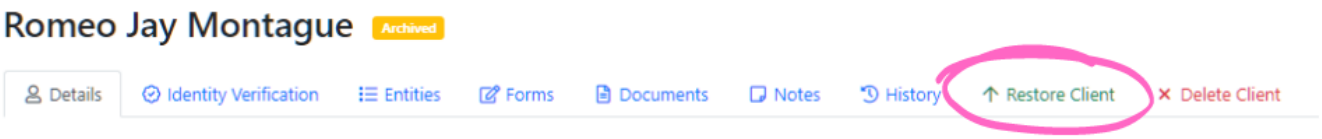


Check you have selected the correct option before confirming as deleting a client cannot be undone.

Re-instating clients

To reactive a client that has been archived, go to their client record page.

Go to the tabs at the top of the client's page and select **Restore Client**.



Click the green **Restore Client** button to confirm the action.

