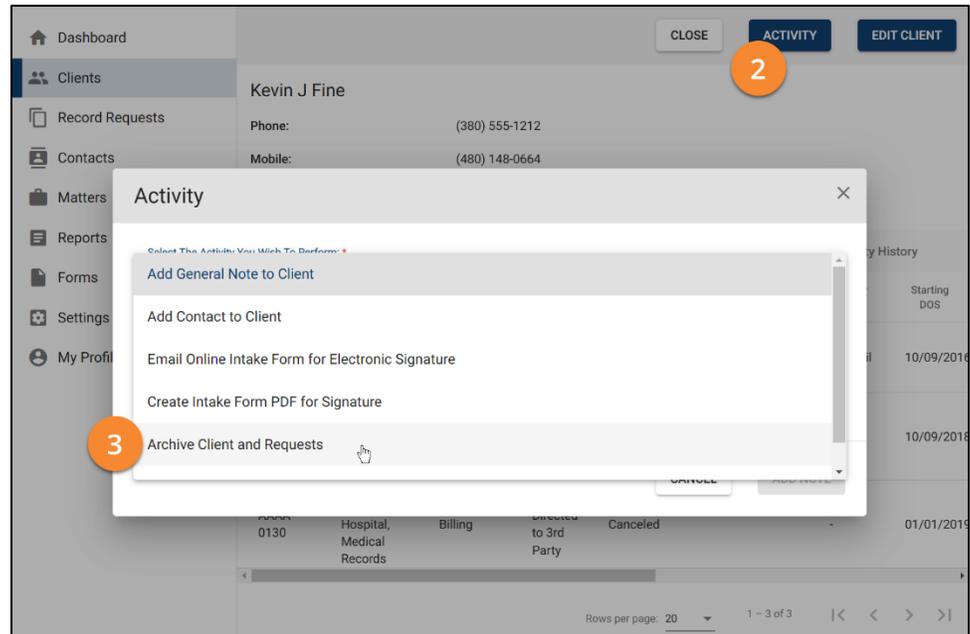
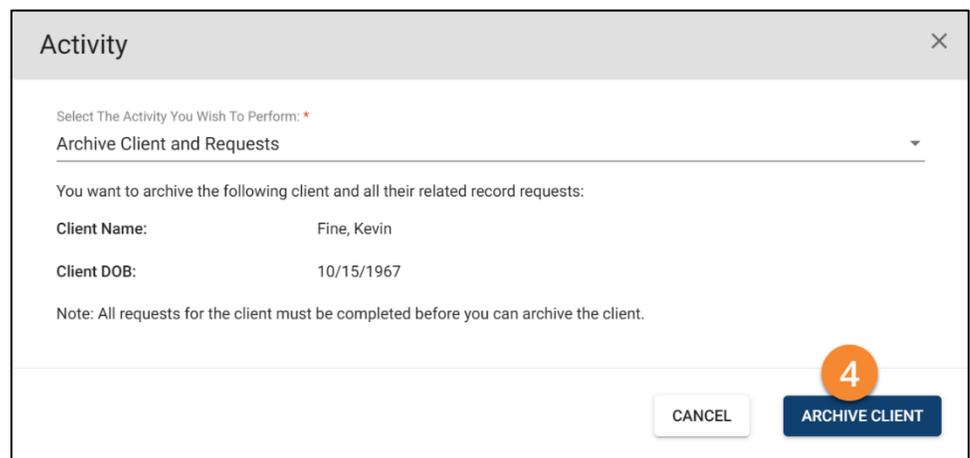


1. Archiving Clients and Requests—Quick Steps

1. Select the Client that you want to Archive.
2. Click the Activity button.
3. Select “Archive Client and Requests” from the dropdown menu.



4. The following dialog box is displayed. Click the Archive Client button to continue.



5. The Confirm Client and Request Archive dialog box is displayed. Click the Confirm Archive button to continue

The screenshot shows a dialog box titled "Confirm Client and Request Archive" with a close button (X) in the top right corner. The main text reads: "You are about to archive all the client and record request information in your account related for the client shown below. Please confirm you want to archive the information:". Below this, there are two fields: "Name:" with the value "Fine, Kevin" and "DOB:" with the value "10/15/1967". At the bottom right, there are two buttons: a white "CANCEL" button and a blue "CONFIRM ARCHIVE" button. An orange circle with the number "5" is overlaid on the "CONFIRM ARCHIVE" button.

6. The Client and Record Request Archive Confirmation dialog box is displayed. Click the Close button to continue using Arctrieval.

The screenshot shows a dialog box titled "Client and Record Request Archive Confirmation" with a close button (X) in the top right corner. The main text reads: "The client and all of their related record requests were successfully archived. You can access archived client and request information through Reports." At the bottom right, there is a white "CLOSE" button. An orange circle with the number "6" is overlaid on the "CLOSE" button.



All of the requests for the Client must have a Completed, Completed – No Records, or Canceled status. If there are any open requests for the Client, the Client cannot be archived.

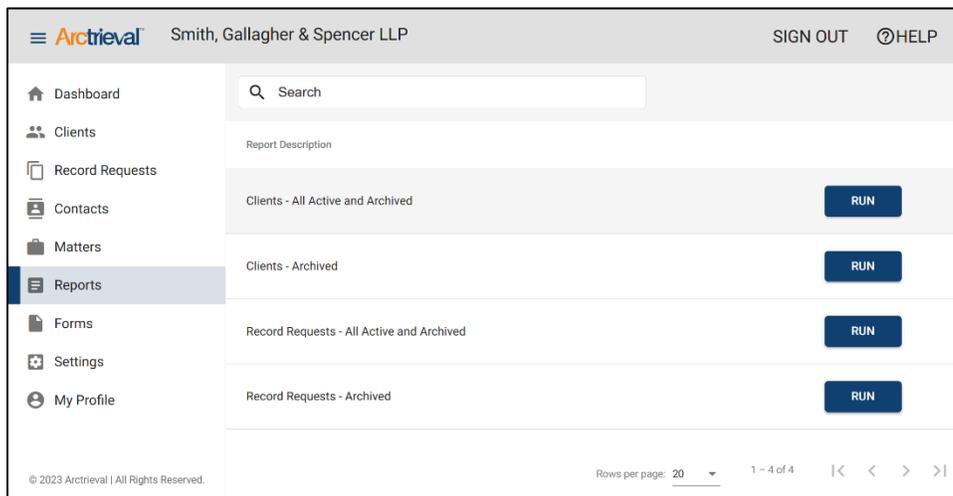
If there are any open requests, the Archive Error dialog box is displayed. Complete or cancel any open requests, before archiving a client.

The screenshot shows a dialog box titled "Archive Error" with a close button (X) in the top right corner. The main text reads: "There was an error archiving the client and their related record requests. Please check that all requests for the client are completed or canceled. Clients with open requests cannot be archived. Please contact Arctrieval support for additional assistance." At the bottom right, there is a white "CLOSE" button.

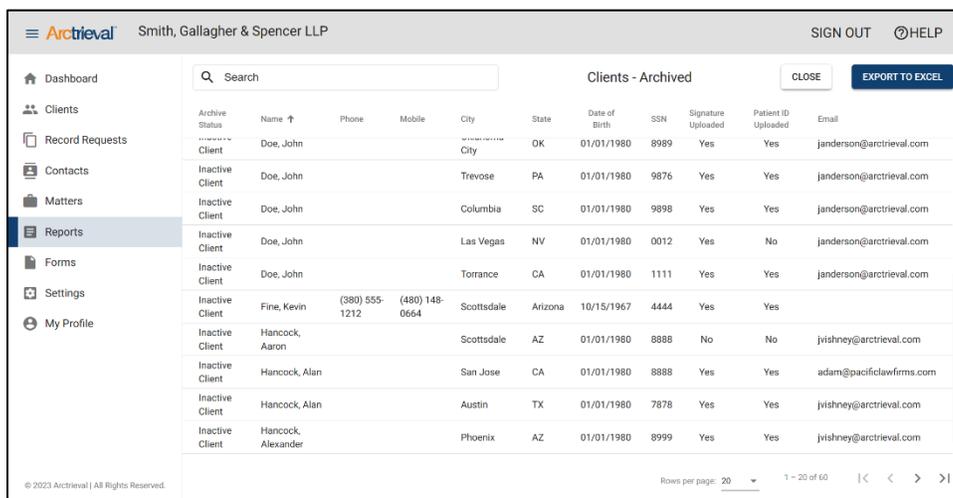
2. View Archived Clients and Requests

After a Client and their associated requests are archived, the archived information is accessible through the Reports menu as shown in the image.

Click the Run button that corresponds to the information you want to view.

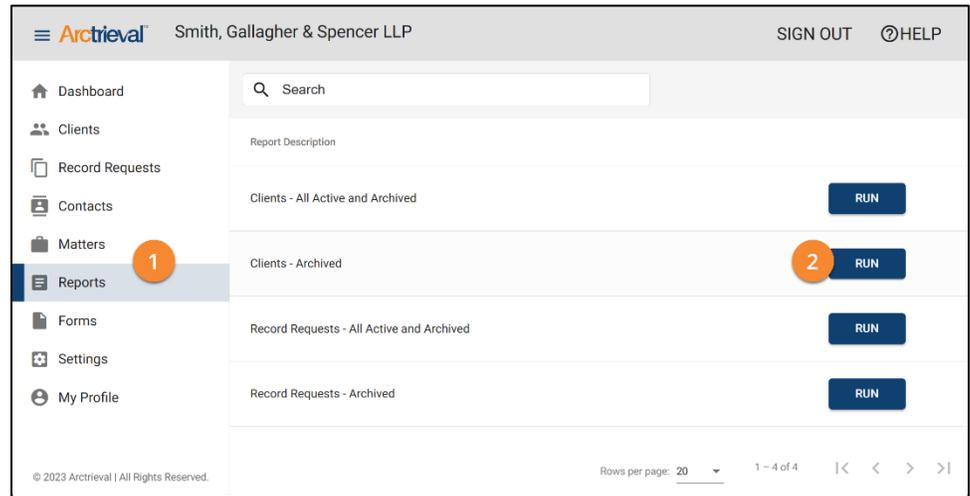


The Inactive Client list is displayed.

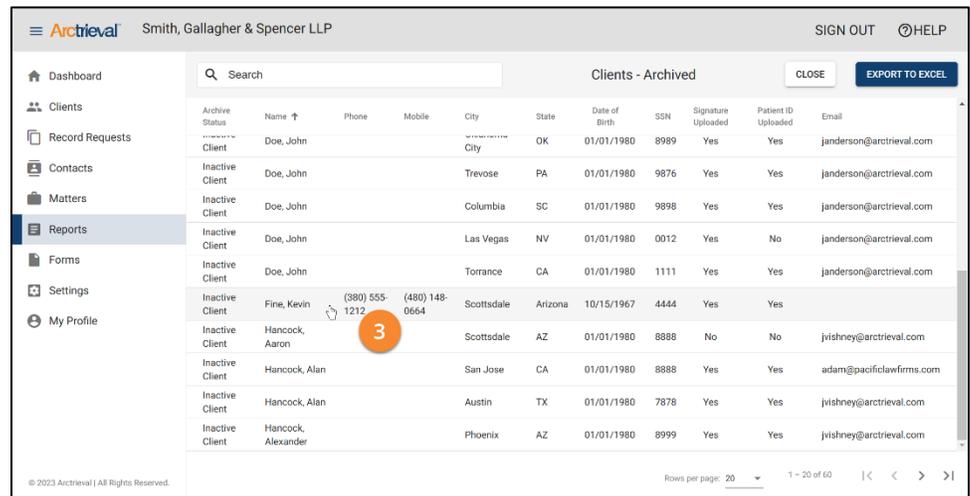


3. Restoring Archived Clients and Requests

1. Click on the Report menu
2. Click the Run button next to Clients-Archived in the report description list.

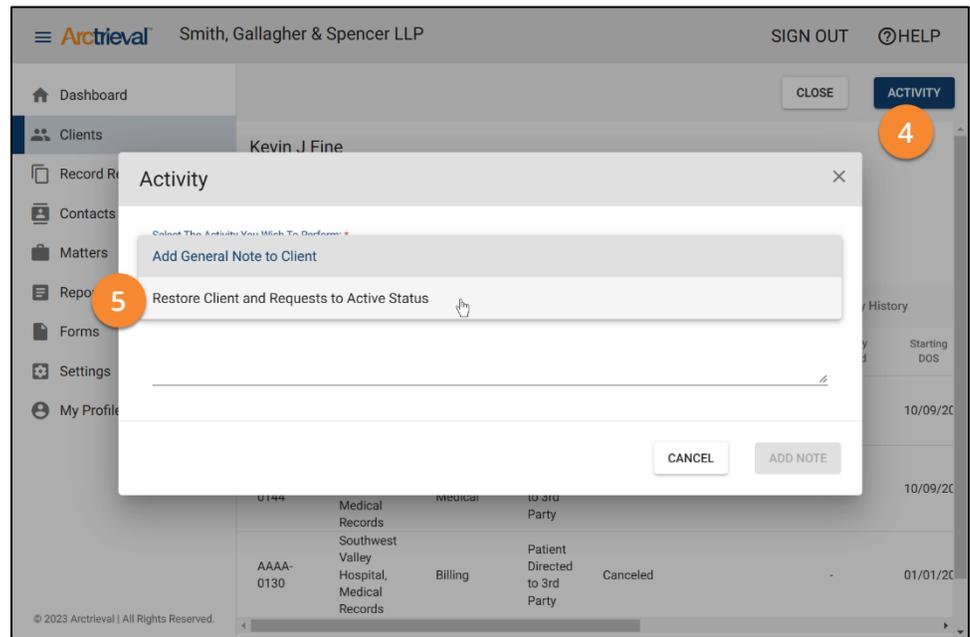


3. Click on the Client you want to reactivate from the list. You can narrow down the list by entering the Client's name in the Search box.

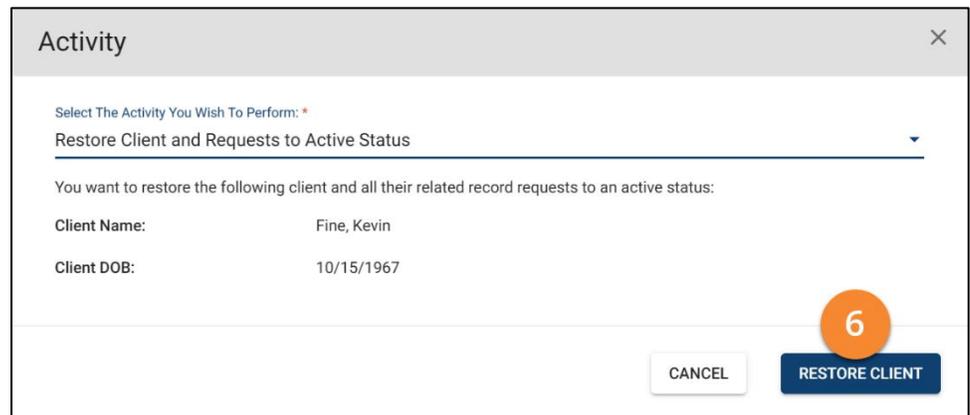


Archiving and Restoring Clients and Requests

- 4. Click the Activity button.
- 5. Select "Restore Client and Requests to Active Status" from the dropdown menu.



- 6. Click the Restore Client button.



- 7. The Client and Record Request Restore Confirmation dialog box is displayed. Click the Close button to continue using Arctrieval.

