Deleting a Case

12/17/2024 1:12 pm EST

Deleting a case in SIPS can be a crucial task, whether it's for correcting errors, removing outdated data, or ensuring data security. Before deleting any data, it is wise to back up your data. This ensures that you can restore the case if needed. Always handle data carefully and ensure you have the necessary backups and permissions before performing deletions. This guide will walk you through the process step-by-step.



Step 1: Logging In: Log into SIPS.

Step 2: Go To Your Case List: You can either do this by clicking on the green GoTo Your Case List button or clicking on the Your Case List Subheading located in the upper righthand side of your screen.



Step 3: View All Cases: Click on the Green View All Cases button underneath the Your Case List Heading located on

the lefthand side of your screen.

			YOUR CASE LIST SETTI	NGS HELP SIGN OUT				
Your Case List								
Add Case View All Cases Search Using Selection Maximum number cases allowed: Current number of cases								
Search for Case								
Case	Initial Plan Date	Revised Date	Tags	Active				
		Rows Per Page 25	Rows Per Page 25 K No records > >>					
SIPS Retirement Planning System			PRI	VACY POLICY TERMS OF USE				

Step 4: Delete: Scroll down, pick the case and click on the green Del button located on the righthand side of the screen.



Step 5: Permanent Deletion: After clicking on the green Del button a sipsplanning.net text box will come up and ask, "Are you sure you would like to permanently delete this recommendation?" Click the OK button to permanently delete the item.

Your Case List Ad Case View All Cases Search Using Selection Maximum number of Cases allowed: Current number of Cases:	www.sipsplanning.net says Are you sure you would like to permanently delet	te this case? OK Cancel	YOUR CASE LIST SE	TTINGS HELP SI	IGN OUT
Search for Case					
Case	Initial Plan Date	Revised Date	Tags	Active	e e e e e e e
SIPS Flamming System		•	Rows Per Page	25	f1>>>

Step 6: Logout: To sign out of SIPS, click on the Sign Out heading tat is located in the upper righthand side of the screen.



If you feel you need more support or would like to set up demo time with one of our representatives, please contact us at: +1-888-449-6917 or support@planscout.com