

Deleting Debtors

How to permanently remove debtors in Lariat

Do you have a few duplicate debtors to delete? Cleaning up the system? A client cancel some accounts? There are a variety of reasons to delete debtors from Lariat. This guide walks you through how to accomplish this task.

1. Queue it for deletion

By default Lariat has a “deletedq” which is a shared desk/queue where debtors are held until they are deleted in bulk by an administrator.

A collector agent with a typical access level can assign a debtor for deletion, but the collector *cannot* delete the debtor from Lariat. The actual deletion happens separately and can only be completed by an administrator.

To queue the debtor for deletion, go to the debtor and change the agent assignment to “deletedq” in the drop down menu:

NOTE — While “Deletedq” is the option that comes with Lariat by default, make sure to confirm with your supervisor, as applicable, to confirm the process your agency follows for deleting an account, as it may differ.

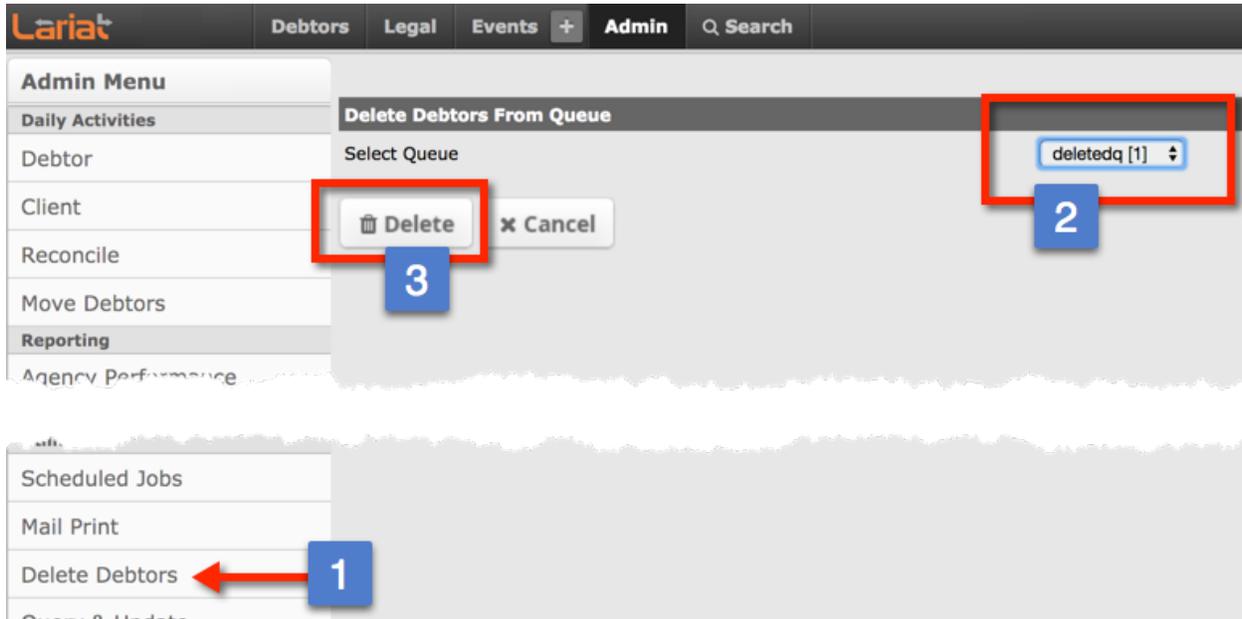
The screenshot shows the Lariat software interface. At the top, there are navigation tabs: Debtors, Legal, Events, Admin, and Search. Below this is a 'Debt Action' section with a menu of options: PTP, Send Letter, Account Summary, Notes, Aging Schedules, Contacts, Transactions, Debt Summary, Add Transaction, CBR History, UDFs, Payment Profiles, and SMS. A 'Document Linking' section contains a 'Save' button. Below that is a table with columns: Client, Balance, Status, Client #, Last Pay Amt, Last Pay Date, PTP/PS Amount, and PTP/PS Date. A row is visible for '(ID 1162) King Office, Inc' with a balance of \$11,100.00 and status 'PAY'. The bottom section is 'Debtor Information -- Debtor ID 1209 -- Last Update 10/25/2017'. It contains fields for Full Name (Jane), SSN (Knuberry), Next Contact (10/27/2017), Balance (\$11,100.00), and Agent (deletedq). The 'Agent' dropdown menu is highlighted with a red box.

If you have more debtors to delete than you can feasibly reassign one at a time, feel free to contact our Support Team at support@lariat.co to see if a bulk move is possible.

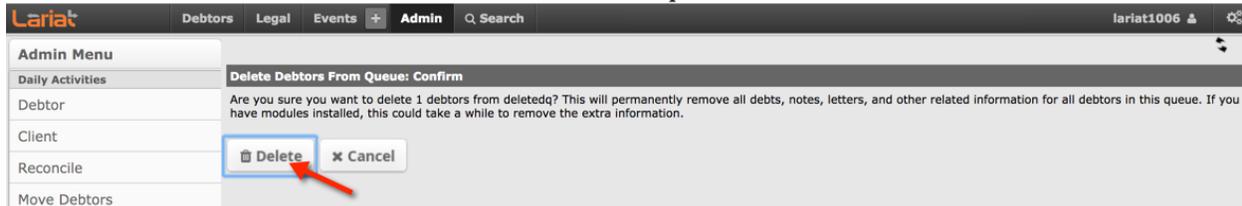
Whether assigned to “deletedq” one at a time or in bulk, the final step is the same (see step 2).

2. Delete debtors in “deletedq”

As an administrator you can delete debtors in bulk from a queue. To do this go to **Admin > Delete Debtors > Deletedq > Delete:**



Lariat will ask you to confirm before the debtors are deleted. Click “delete” to finalize the deletion and remove the debtors in the selected queue:



It is *very important* to note that this deletion is ***permanent***. There is no “undo” button so double check the debtors queued for deletion before removing them. If you have any concerns or questions about a deletion project, do not hesitate to reach out to our Support Team for assistance.

Still have questions? Contact us at support@lariat.co

or call 877.268.6667.