

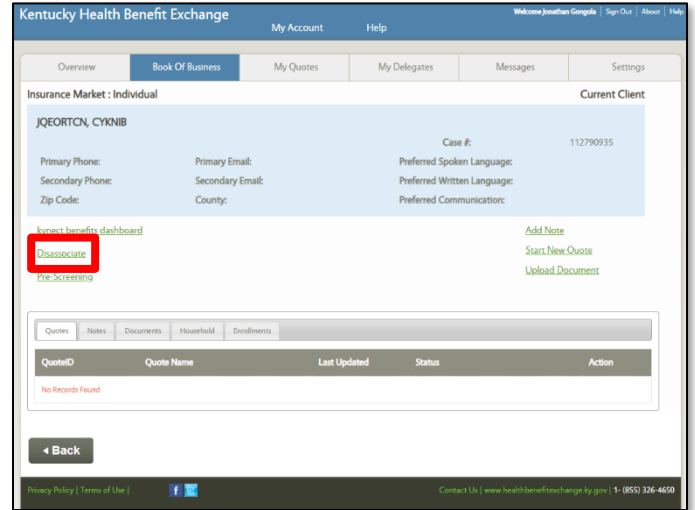


Agent Portal: Disassociate from Clients and Abandon Prospects

Agents disassociate from a client when they no longer have business with that Individual. Agents abandon prospects when they are no longer pursuing that Individual's business. Agents may disassociate from a client or abandon a prospect within Agent Portal via the **Client Details** screen and **Prospect Details** screen, respectively. To disassociate from a client or abandon a prospect, please follow the steps as listed below.

Steps to Disassociate from a Client:

1. Navigate to the **Book of Business** screen.
2. Click on the client's **Name** to navigate to the **Client Details** screen.
3. Click **Disassociate**.
4. A pop-up displays stating *Are you sure you want to disassociate the Agent [Agent Name] for Individual: [Individual Name]*. Click **OK**.



Steps to Abandon a Prospect:

1. Navigate to the **Book of Business** screen.
2. Select **Current Prospect** from the *Choose Client/Prospect* drop-down.
3. Click **Search** to display the Agent's prospects.
4. Click on the prospect's **Name** to navigate to the **Prospect Details** screen.
5. Click **Abandon**.
6. A pop-up displays stating *Are you sure you want to abandon this prospect? You can move it back to current prospects list anytime*. Click **OK**.

