We want to delete our Disavowed Users and also keep all their transaction information in ILLiad

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Symptom

• You want to delete our Disavowed Users and also keep all their transaction information in ILLiad

Applies to

• ILLiad

Resolution

If you want to delete our Disavowed Users and also keep all their transaction information in ILLiad, here are the steps you need to take:

1. You need to create an account in the ILLiad Client following the Create New Users Manually documentation. The information in the accounts is not essential.
2. Let’s say the name of the account is Merged1.
3. Merged1 changes the Cleared Status of Merged1 to "Not cleared."
4. Also, Merged1 has to change the Merged1 account to the first and last name of the account that you are merging, so you have to have both usernames opened.
5. Merged1 then goes to the account that needs to be merged and changed it to "Not Cleared" for the Cleared Status.
6. Merged1 then goes to Clear Users. And Highlights Merged1.
7. You should see the same name in the "Similar Users" on the right side.
8. Click on the Merge Users icon on the top.
9. Make sure the checkbox for "Send Notification" is not checked on the bottom left if you do not want an email sent out. Otherwise, leave it checked.
10. You will now see the two different Usernames. On the left, you will see a box with "Keep New User, Disavow Existing User." On the right, you will see "Keep Existing User, Disavow New User." You select the one that keeps Merged1.
11. You will see a message "Disavowing (Username) will move all open requests to Merged1. Continue?"
12. Choose Yes.
13. You will now be at your Cleared Users screen
14. Close the window and go back to step 3, and do the process again for the next user until they are complete.

Now, you can delete all the accounts that are at the Cleared Status of Disavowed (DIS) through The ILLiad Database Manager.

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