AMS360 Purge Data Checklist

Print this checklist and complete the following tasks prior to purging data. For details, see the *Purge* help topic.

Step	Task	✓
1.	Verify that Customers are set to inactive. ➢ Select the **Set Customers to Inactive based on** [date] check box in Daily Process. You can use this option to mark customers as "Inactive" if their policies are all expired on the Daily Process date.	
	➢ Identify customers who don't have any policies by creating a target list in the Sales Center. For details, see the *Target List* help topic.	
2.	Verify that Customers don't have their accounts or any policies marked "Exclude from Purge." ➢ Run the Customer List report and verify that the account statuses are appropriately set (Active or Inactive). If necessary, mark the accounts as "Exclude from Purge."	
3.	Verify that Customers have all suspense items marked as complete. ➢ Run the Suspense report and determine if suspenses reported should be completed or deleted. For details, see the *Report: Suspense* help topic.	
	➢ Set the following options in the Suspense report form: 1. In the Suspense Selection area, set the Status field to **Not Completed**. 2. In the Due Date Range > **From** and **To** fields, select a range between the earliest possible due date and the date for the Purge.	
4.	Verify that Customers have all customer claims closed on or before the Purge Data Through date. ➢ Run the Claim Management report and determine if claims reported should be closed. For details, see the *Report: Claims Management* help topic.	
	➢ Set the following options in the Claim Management report form: 1. In the Data Range area, select **Loss Date**. 2. In the Data Range > **From** and **To** fields, select a range between the earliest possible loss date and the date for the Purge. 3. In the Claim Selection area, set the Claim Status field to **All** open types.	
5	Verify that Customers have every entity of master/sub groups match all of the Purge requirements. Only the master customer is displayed in the Purge Item and Purge Results Detail lists.	
7.	Export eligible purge items to a CSV (Comma Separated Values) file and review the items for Purging. ➢ To export purge items: 1. In the Purge page, select the Purge options. 2. Click **Apply** to populate the Purge Item list with items eligible for Purging. 3. Click **Export**.	