

Delete Customer Notes

Last Modified on 08/05/2025 2:49 pm EDT

To delete a Customer Note, you must first access the customer record.

From the main menu, arrive at the Customers list with this path: Accounts Receivable> Customers.

The Customers list opens. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.

Customers

Customers Sites Systems

Search Customers + Add Customer Export to Excel

Drag a column header and drop it here to group by that column

Customer #	Name	Address	City	State	Balance Due	Total RMR
3654	Holmes Fans	10556 Washington Street	Chagrin Falls	OH	\$0.00	\$0.00
3652	Cactus World	3601 Saguaro Street	Tucson	AZ	\$0.00	\$0.00
3505	Smith, Aaron	123 Main St	Columbus	OH	\$182.81	\$30.00
3504	Allen Automotive Services	634 Morgan Street	Cincinnati	OH	\$182.81	\$30.00
3502	Tesay	Address1	City	OH	\$0.00	\$0.00
3499	Edwards Security	345 Main Street	Columbus	OH	\$221.47	\$55.00
3498	Crafted Crates	233 Widmore Ave	Columbus	OH	\$222.56	\$30.00

1 - 100 of 178 Items Refresh

The Customer record opens. Click on the Notes tab. Locate the Note you want to delete, and then click the **Delete** button (trashcan icon).

Emily Wood
Customer #3703 Active Normal Residential-Owner • Since 3/7/22

Total Balance Due Total RMR
\$0.00 \$0.00

Customer Aging

Address 45722 Chandler
Phoenix, AZ 85003

Phone
Cell
Email emily.wood@gmail.com

Salesperson Dan Brown
Last Statement
Default Term
Delivery Method
Delivery RMR Inv

Comments

Invoices 1 Credits 0 Sites/Systems 1/1 RMR 2 Work Orders 1 Proposals 0 Payments 0 CC/eCheck Notes 3 Contacts 3 Documents Archive Custom Fields eForms Email

+ Add Note

Note	Modified	Modified By	Type	Expiration	
(COL) Called for payment. Left message for a call-back.	05/20/2022 07:29:29 PM	Emily Wood	Standard		Edit Delete
On 05/01/2022 change the billing address to the Plymouth MI site address.			Critical		Edit Delete
Customer lives in Phoenix 6 months out of the year. The other 6 months is at the Plymouth MI site.			Standard		Edit Delete

Please confirm
Are you sure you want to delete the note?
No Yes

1 - 3 of 3 Items Refresh

A confirmation message opens. Click the Yes button to delete the note.