## **Delete Customer Notes**

Last Modified on 12/12/2024 1:16 pm EST

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

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

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

| ustomers Site        | es Systems                       |                 |                         |   |                |              |                     |                    |
|----------------------|----------------------------------|-----------------|-------------------------|---|----------------|--------------|---------------------|--------------------|
| Search Customers     | Add Customer                     | Export to Excel |                         |   | NO Master Cust | tomers ND Te | erminated Customers | Custom Grid Layout |
| Drag a column header | and drop it here to group by tha | t column        |                         |   |                |              |                     |                    |
| Customer # 🕴 🚦       | Name                             | ÷               | Address                 | : | City :         | State :      | Balance Due         | Total RMR          |
| 3654                 | Holmes Fans                      |                 | 10556 Washington Street |   | Chagrin Falls  | он           | \$0.00              | \$0.00             |
| 3652                 | Cactus World                     |                 | 3601 Saguaro Street     |   | Tucson         | AZ           | \$0.00              | \$0.00             |
| 3505                 | Smith, Aaron                     |                 | 123 Main St             |   | Columbus       | ОН           | \$182.81            | \$30.00            |
| 3504                 | Allen Automotive Services        |                 | 634 Morgan Street       |   | Cincinnati     | ОН           | \$182.81            | \$30.00            |
| 3502                 | Tesay                            |                 | Address1                |   | City           | ОН           | \$0.00              | \$0.00             |
| 3499                 | Edwards Security                 |                 | 345 Main Street         |   | Columbus       | ОН           | \$221.47            | \$55.00            |
| 3498                 | Crafted Crates                   |                 | 233 Widmore Ave         |   | Columbus       | ОН           | \$222.56            | \$30.00            |

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

| Costomer #3703 (Active) (Normal) Residential-Owner - Since 3/7/22                                  |    |                            |               |              |            |        |                  |  | 🧨 Edit       | i Tasks    | 🕤 History |
|--|----|----------------------------|---------------|--------------|------------|--------|------------------|--|--------------|------------|-----------|
| Total Balance Due Total RMR<br>\$0.00 \$0.00<br>Customer Aging                                     |    |                            | Addr<br>Pho   | Phoenix, AZ  |            |        |                  | Salesperson<br>Last Statement<br>Default Term<br>Delivery Method | Dan Brown    |            |           |
| 12<br>1<br>08<br>06<br>04<br>02  |    | Email emilyLwood@gmail.com |               |              |            |        | Delivery RMR Inv |  |              |            |           |
| o  |    |                            |               |              |            |        |                  |  |              |            |           |
| Invoices Credits Sites/Systems RMR Work-Orders Proposels 1 0 1/1 2 1 0                             | Pa | ayments<br>O               | CC/eCheck     | Notes<br>3   | Conta<br>3 |        | ocuments         | Archive  | Custom Field | s eForms   | Emai 🕨    |
| + AddNote  |    |                            |               | $\bigcirc$   |            |        |                  |  |              |            |           |
| Note   | ÷  | Modified                   | :             | Modified By  | ÷          | Туре   | :                | Expiration   | :            |            |           |
| (COL) Called for payment. Left message for a call-back.  | 1  |                            | 00.0.70.00.DV | Denes Ten in |            | Stand  | lard             |  |              | 🖋 Edit 📋   | Delete    |
| On 05/01/2022 change the billing address to the Plymouth MI site address.                          |    | Please c                   | onfirm        | ×            |            | Critic | cal              |  |              | 🖉 Edit 🔟   | Delete    |
| Customer lives in Phoenix 6 months out of the year. The other 6 months is at the Pfymouth MI site. |    | Are you s                  | No Yes        |              |            | Stand  | fard             |  |              | 🖋 Edit 🜘   | Delete    |
| н 🔸 🚺 н н  |    |                            |               |              |            |        |                  |  | 1-3          | of 3 items | Refresh   |

A confirmation message will be displayed. Click the Yes button to proceed with the deletion of the record.