

# Inactivate a Site

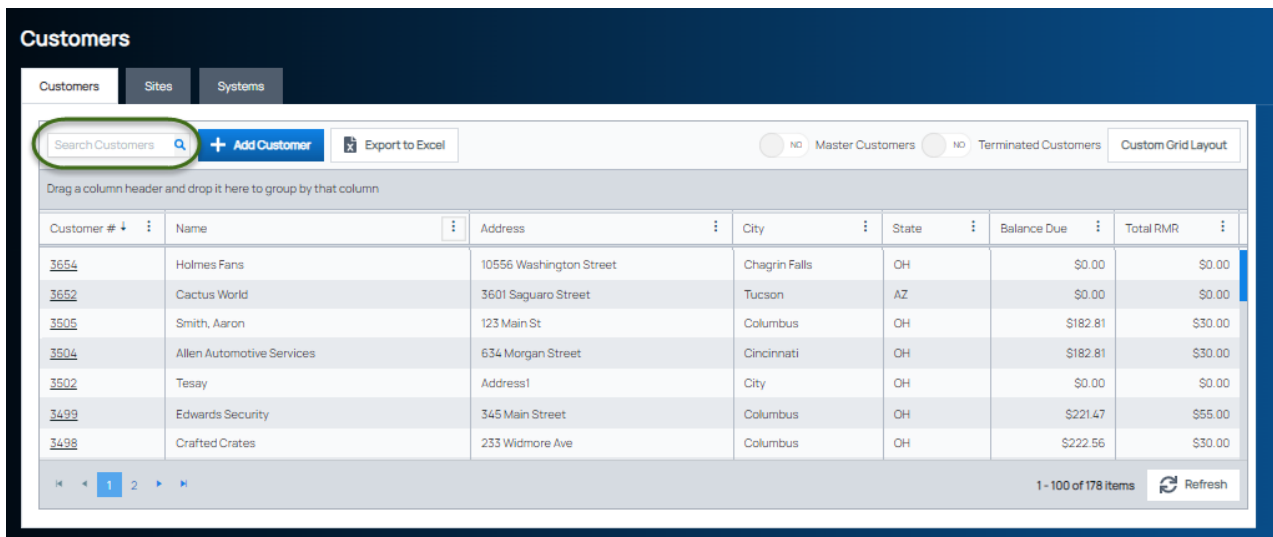
Last Modified on 12/12/2024 1:54 pm EST

To inactivate a Site, you must first access the customer record.

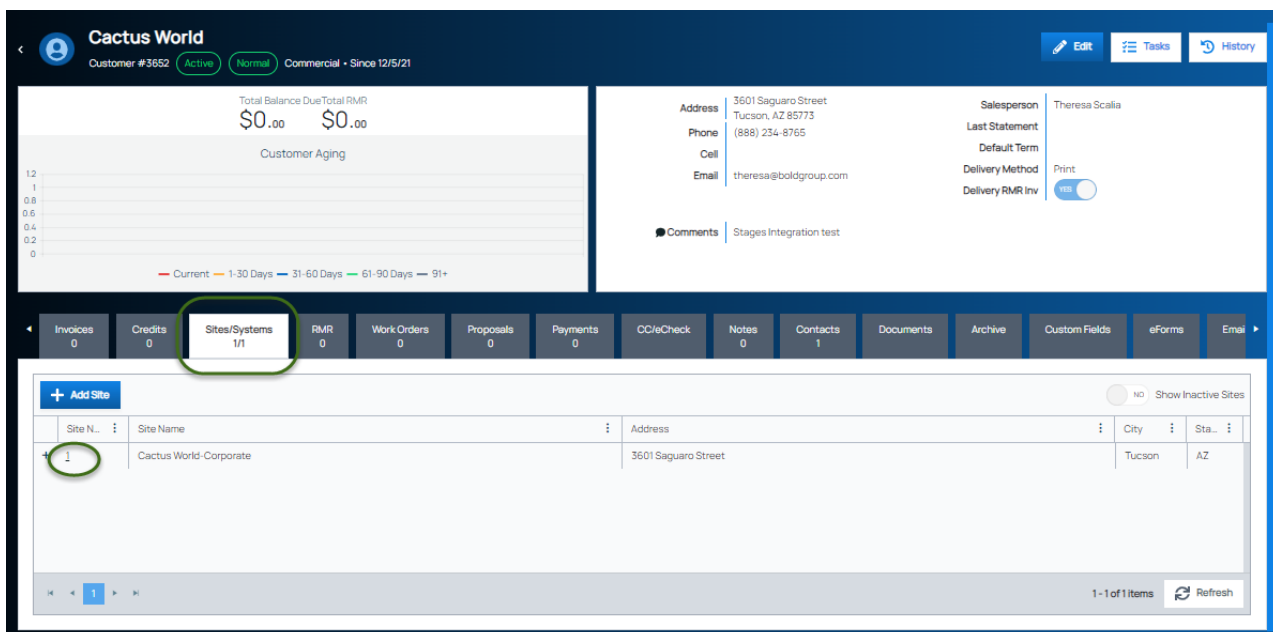
From the main menu, arrive at the Customers list with this path: CRM > Customers.

The Customers list opens. If you know the name of the customer to which the Site is attached, locate the Customer, and then click on the hyperlink in the Customer # column to open the customer record.

If you do not know the customer number or customer name to which the Site is attached, however you do know the Site Name, click on the Sites tab to search for the customer by Site Name.



The Customer record opens. Click on the Sites/Systems tab, and then in the Site Number column, click on the hyperlink of the Site you want to inactivate.



The Site record opens. Click the **Edit** button located at the upper right of the page.

1 - Cactus World-corporate  
Active Cactus World - 3652

3601 Saguario Street, Suite 550 Tucson, AZ 85773  
(888) 234-8765  
theresa@boldgroup.com

RMR \$0.00

Warranty Start 12/05/2021  
Warranty Labor 1 Year Parts & Labor  
Warranty Part 1 Year Parts & Labor  
Service Level SVC T&M RES

Sales Tax Geauga  
Tax Rate 10.555%  
Tax Exempt -  
Site Since 12/05/2021  
Inactive Date -

Notes 0 Systems 1 RMR 0 Work Orders 0 Site Parts 0 Contacts 0 Zones 0 Authorities 0 Docs Custom Fields Item Defaults eForms Part Ledger External

+ Add Note

Note	Modified	Modified By	Type	Expiration
No records available.				

0 - 0 of 0 Items Refresh

The Site record opens in edit mode. In the Inactive field, set the toggle button to On. The Inactive Date will default to today's date and may not be modified. Click the **Save** button when finished.

1 - Cactus World-corporate  
Active Cactus World - 3652

Save Cancel

Use Customer Address  OFF

Site Name Cactus World-Corporate

Address 3601 Saguario Street  
Suite 550  
Tucson  
Arizona  
85773 Plus4

Phone (888) 234-8765 ext.

Email theresa@boldgroup.com

Site Number 1

Sales Tax GC - 8.555%

Tax Exempt TaxExempt Number

Site Since 12/05/2021

Inactive  OFF

Inactive Date month/day/year

Warranty Start Date 12/05/2021

Warranty Labor 1 Year Parts & Labor

Warranty Part 1 Year Parts & Labor

Service Level SVC T&M RES

Branch Please Select

Comments

0/255