Delete a Site Contact

Last Modified on 12/16/2024 2:38 pm EST

Site Contact records are attached to a Customer record, so 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. 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			NO Master Cust	comers NO Te	erminated Customers	Custom Grid Layout			
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	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			
<u>3504</u>	Allen Automotive Services		634 Morgan Street		Cincinnati	ОН	\$182.81	\$30.00			
3502	Tesay		Address1		City	ОН	\$0.00	\$0.00			
<u>3499</u>	Edwards Security		345 Main Street		Columbus	ОН	\$221.47	\$55.00			
3498	Crafted Crates		233 Widmore Ave		Columbus	ОН	\$222.56	\$30.00			
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The Customer record opens. Click on the Sites/Systems tab, and then in the Site Number column, click on the hyperlink of the Site for which you want to delete a contact.

Customer # 3703 (Active) (Normal) Residential-Owner - Since 3/7/22	✓ Eat #Ξ Tasks *3 History
Total Balance Due Total RMR \$0.co \$0.co	Address 45722 Chandler Salesperson Dan Brown Phoenix, AZ 85003 Last Statement
Customer Aging	Cell Email emilyLwood@gmail.com DeliveryRMR.hv Comments
u 2 0 — Current — 1-30 Days — 31-60 Days — 61-90 Days — 91+	
Invoices Credits Sites/Systems PMR Work-Ordens Proposals Paymen 1	nts CC/eCheck Notes Contacts Documents Archive Custom Fields eForms Email
+ Add Site	NO Show Inactive Sites
Site N : Site Name	i Address i City i Sta i
Emily Wood	45722 Chandler Phoenix AZ
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The Site record opens. Click on the Contacts tab. Locate the Contact you want to delete, and then click the Delete button (trashcan icon).

< O 1 - Emily Wood Active Emily Wood - 3703				🎤 Edit 😤 Task	s 🕲 History
45722 Chandler, Phoenix, AZ 85003 - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -	\$2.00	Warranty Start 03/07/2022 Warranty Labor 1 Year Parts & La Warranty Part 1 Year Parts & La Service Level SVC TSM RES	subor Tax Si Inact	kales Tax No Tax Tax Rate 0.0000% (Exempt - 03/07/2022 -	
Notes Systems RMR Work-Orders 1 1 2 1 4 dot linew Condent Add Existing Contact	Site Parts Contacts Zones Aut 0 1 0	norities Docs Custom Fields 0	Item Defaults eForms	Part Ledger External	
Sort : Name 0 Wilson Glenn	i Phone i C (c Please confirm Are you sure you	ell : Passcode : Re X Ne want to delete the customer contact? No No	elationship : Email elghbor	:	Delete
к < 1 > я				1 - 1 of 1 items	2 Refresh

A confirmation message opens. Click the Yes button to proceed with the deletion of the record.