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.

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.

The Site record opens. Click on the Contacts tab. Locate the Contact you want to delete, and then click the Delete button (trashcan icon).

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