

# 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.

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

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.

Site N.	Site Name	Address	City	Sta...
<a href="#">1</a>	Emily Wood	45722 Chandler	Phoenix	AZ

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

1 - Emily Wood  
Active Emily Wood - 3703

45722 Chandler, Phoenix, AZ 85003  
emilylwood@gmail.com

RMR \$2.00

Warranty Start 03/07/2022  
Warranty Labor 1 Year Parts & Labor  
Warranty Part 1 Year Parts & Labor  
Service Level SVC-TSM RES

Sales Tax No Tax  
Tax Rate 0.0000%  
Tax Exempt -  
Site Since 03/07/2022  
Inactive Date -

Notes 1 Systems 1 RMR 2 Work Orders 1 Site Parts 0 Contacts 1 Zones 0 Authorities 0 Docs Custom Fields Item Defaults eForms Part Ledger External

+ Add New Contact + Add Existing Contact

Sort	Name	Phone	Cell	Passcode	Relationship	Email	
0	Wilson, Glenn	(602) 998-1234			Neighbor		<input type="button" value="Edit"/> <input type="button" value="Delete"/>

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

1 - 1 of 1 Items Refresh

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