

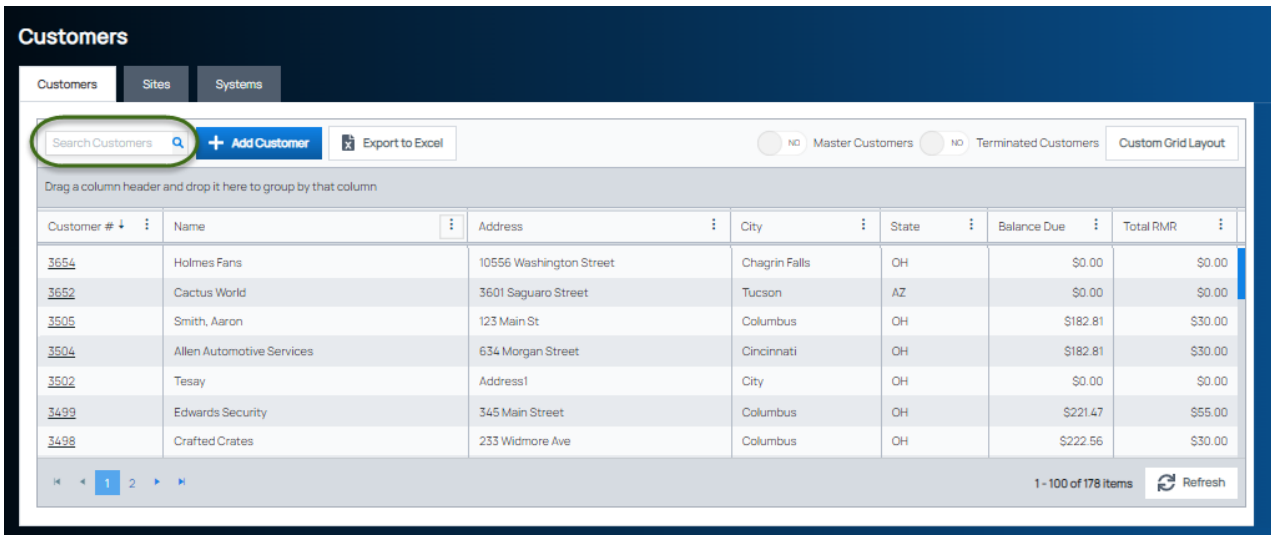
Delete Site Notes

Last Modified on 12/12/2024 1:41 pm EST

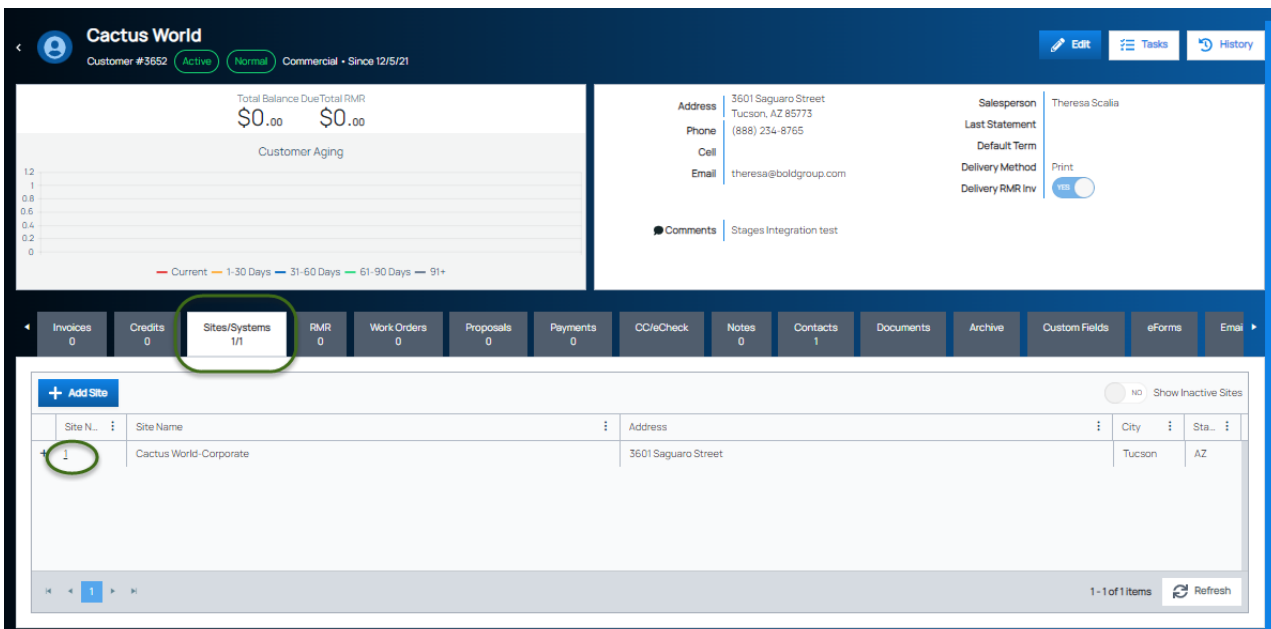
To delete a Site Note, you must first access the customer record.

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.



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 note.



The Site record opens. Click on the Notes tab. Locate the Note you want to delete, and then click on 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 T&M RES

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

Notes 2 | 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

Note	Modified	Modified By	Type	Expiration	
Do Not Park in the customer's driveway!			Critical		Edit Delete
This is the Site note for the Phoenix location.			Standard		Edit Delete

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

1 - 2 of 2 items Refresh

A confirmation message is displayed. Click the Yes button to delete the record.