## **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.

| ustomers Site        | es Systems                         |                 |                         |   |               |             |                     |                    |
|----------------------|------------------------------------|-----------------|-------------------------|---|---------------|-------------|---------------------|--------------------|
| Search Customers     | Add Customer                       | Export to Excel |                         |   | Master Cust   | omers NO Te | erminated Customers | Custom Grid Layout |
| Drag a column header | r and drop it here to group by the | it column       |                         |   |               |             |                     |                    |
| Customer # 🕴 :       | Name                               |                 | Address                 | 1 | 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            |
| 3504                 | Allen Automotive Services          |                 | 634 Morgan Street       |   | Cincinnati    | ОН          | \$182.81            | \$30.00            |
| 3502                 | Tesay                              |                 | Address1                |   | City          | ОН          | \$0.00              | \$0.00             |
| 3499                 | Edwards Security                   |                 | 345 Main Street         |   | Columbus      | ОН          | \$221.47            | \$55.00            |
| 3498                 | Crafted Crates                     |                 | 233 Widmore Ave         |   | Columbus      | он          | \$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 note.

| Customer #3652                               |  | rcial • Since 12/5/21 |                          |                               |                             |                                 |           |  | 🥜 Edit            | ź⊒ Tasks         | 3 Histor               |
|--|--|-----------------------|--------------------------|-------------------------------|-----------------------------|---------------------------------|-----------|--|-------------------|------------------|------------------------|
| 12<br>1<br>08<br>06<br>04<br>02<br>0         | Total Balance Due                                  | \$0                   |                          | Addres<br>Phon<br>Ce<br>Ema   | Tucson, AZ<br>e (888) 234-8 | : 85773<br>8765<br>oldgroup.com |           | Salespersor<br>Last Statement<br>Default Term<br>Delivery Methoo<br>Delivery RMR Inv | t<br>1<br>1 Print | a                |                        |
| - Cur<br>Invoices Credits<br>0<br>+ Add Site | rent — 1-30 Days — 31-60 I<br>Sites/Systems<br>1/1 |                       | Proposals Payment<br>0 0 | s CC/eCheck                   | Notes<br>O                  | Contacts<br>1                   | Documents | Archive  | Custom Fields     | eForms           | Emai<br>Inactive Sites |
| Site N : Site Name                           | rld-Corporate                                      |                       |                          | Address     3601 Saguaro Stre | eet                         |                                 |           |  | i                 | City :<br>Tucson | Sta :<br>AZ            |
| н « <mark>1</mark> » н                       |  |                       |                          |                               |                             |                                 |           |  | 1-10              | f1items          | Refresh                |

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).

| Active      Emily Wood     Active      Emily Wood - 3703     45722 Chandler. Phoenic, AZ 85003     emilyLwood@gmail.com | \$2.00                             |   | ·                |               | Sales Tax<br>Tax Rate<br>Tax Exempt<br>Site Since<br>Inactive Date | 0.0000%<br>-<br>03/07/2022 | sks 🛛 🖒 Hist |
|---|------------------------------------|---|------------------|---------------|--|----------------------------|--------------|
| ictes Systems RMR Work Orders S<br>2 1 2 1  | Site Parts Contacts Zones<br>0 1 0 | Authorities Docs<br>0                   | Custom Fields    | Item Defaults | eForms Part  | Ledger External            |              |
| + Add Note Note   | :                                  | Modified :                              | Modified By      | Туре          | Expiration   | :                          |              |
| Do Not Park in the customer's driveway!<br>This is the Site note for the Phoenix location.                              |                                    | Please confirm Are you sure you want to | delete the note? | Critical      |  | J* Edit                    | Delete       |
|   |                                    | No                                      | es               |               |  |                            |              |
| ia a <b>1</b> > >i  |                                    |   |                  |               |  | 1 - 2 of 2 items           | C Refresh    |

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