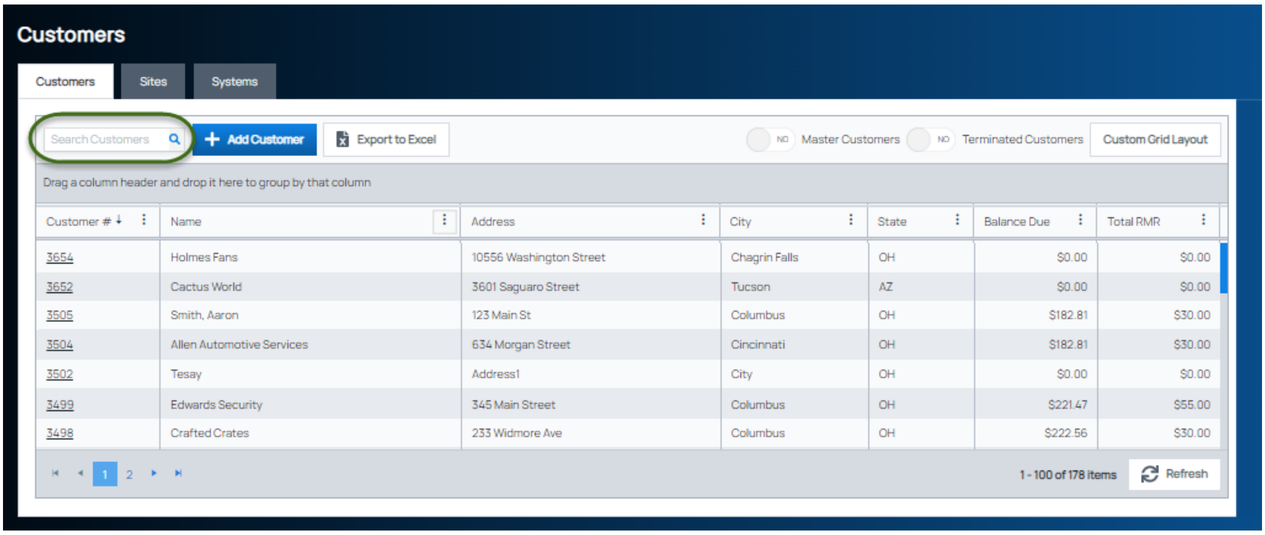
Delete System Notes

Last Modified on 05/01/2022 6:19 am EDT

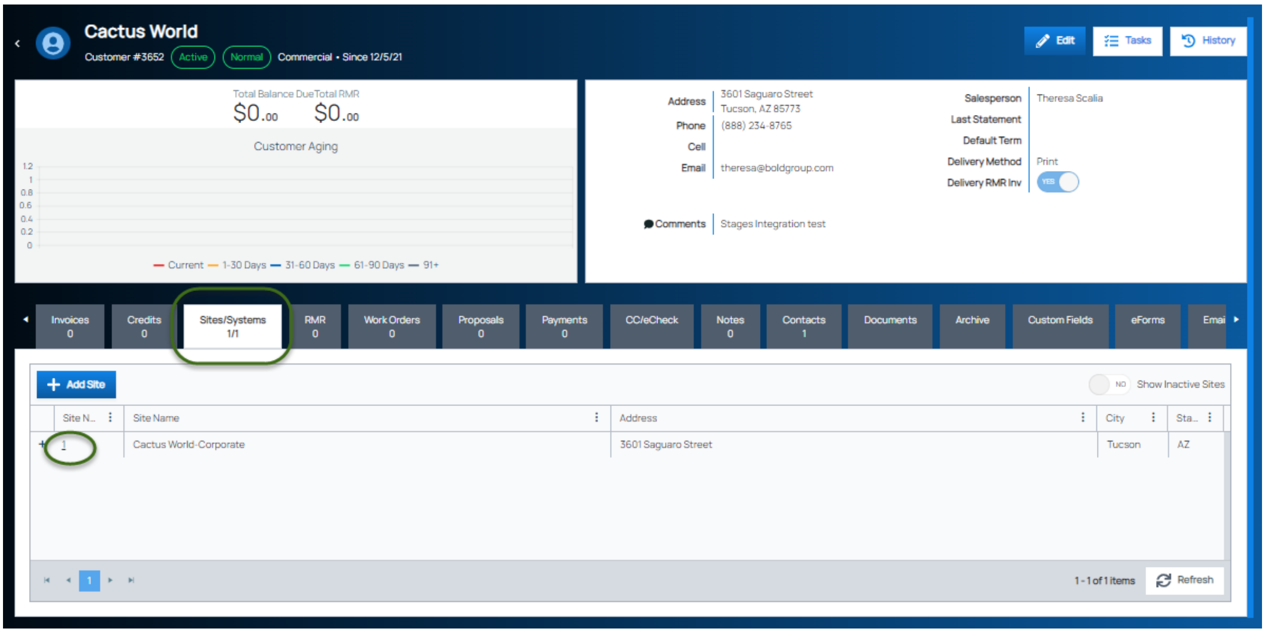
To delete a System Note, you must first access the customer record.

From the main menu, arrive at the Customers list with this path: Accounts Receivable> Customers.

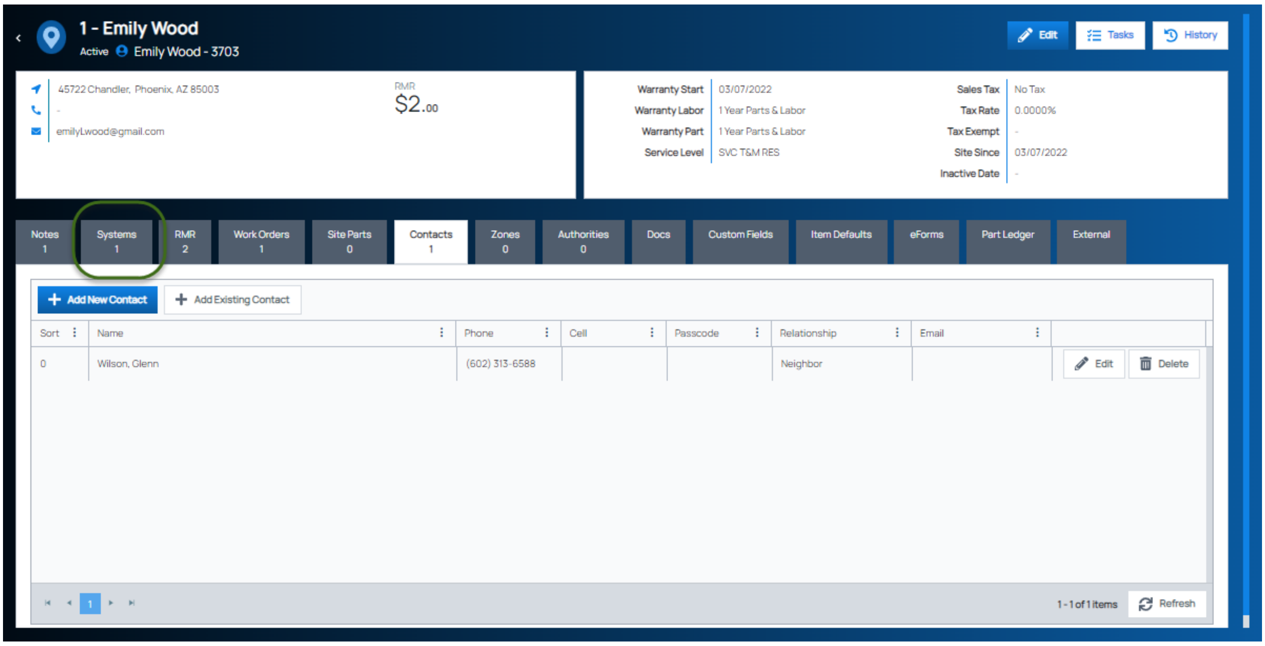
The Customers list will be displayed. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.



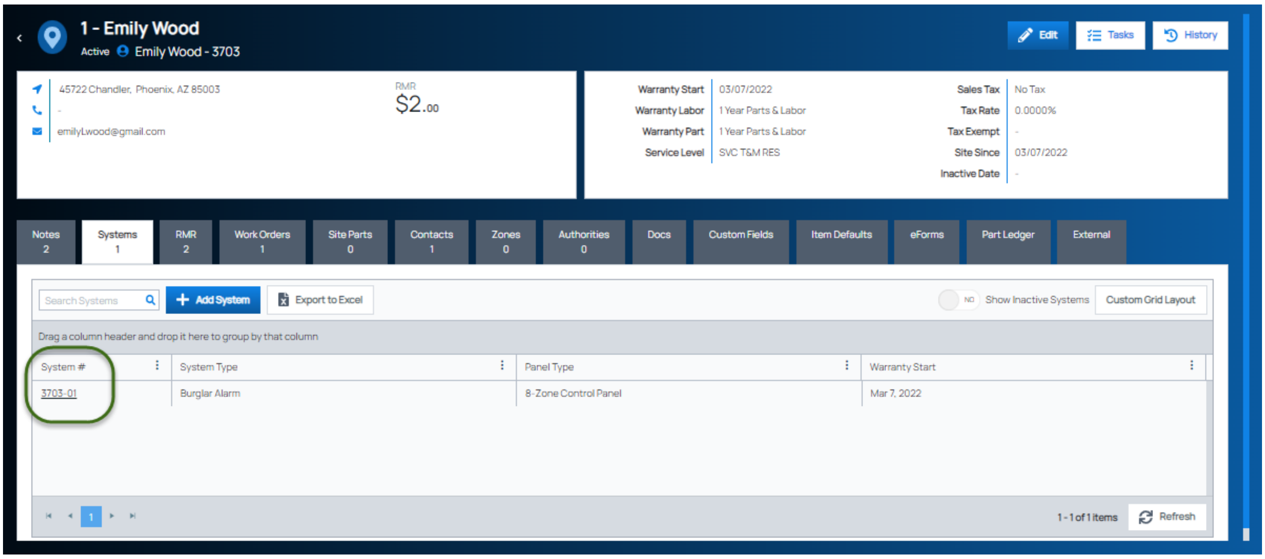
The Customer record will be displayed. Click on the Sites/Systems tab, and then in the Site Number column, click on the hyperlink of the Site to which the System is linked to delete a note.



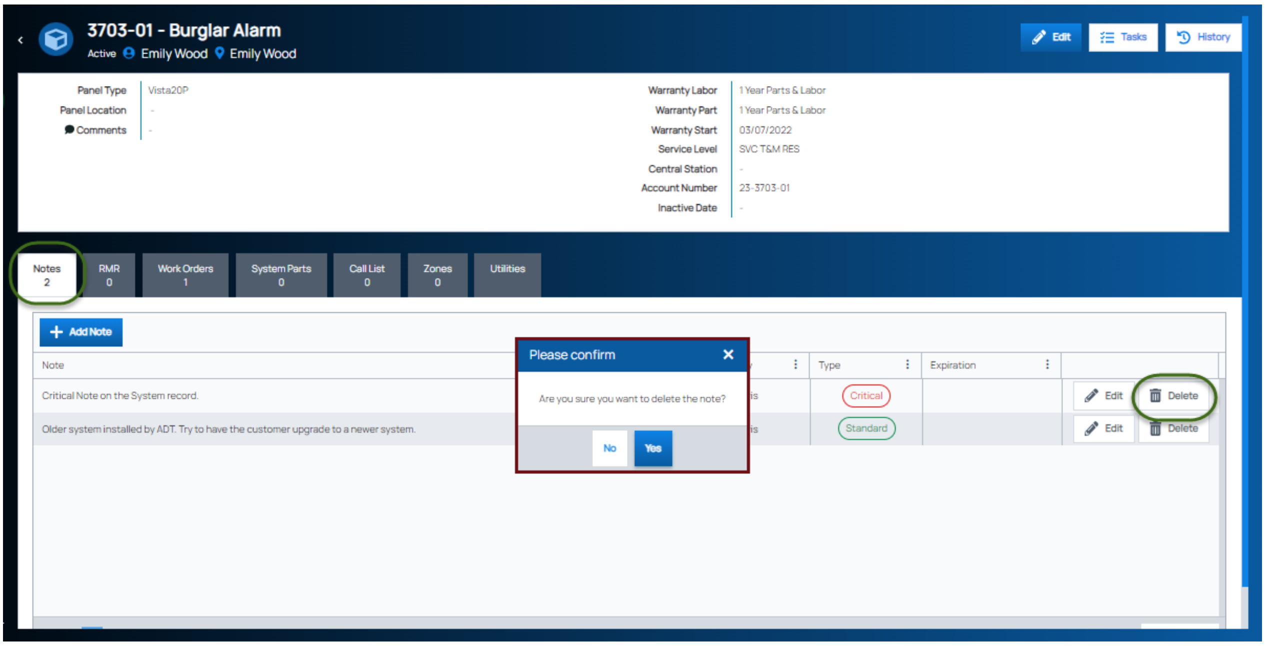
The Site record will be displayed. Click on the Systems tab.



A list of Systems attached to the Site will be listed in the grid area. In the System Number column, click on the hyperlink of the System for which you want to delete a Note.



The System record will be displayed. Locate the Note you want to delete, and then click on the Delete button (trashcan icon).



A confirmation message will be displayed. Click the Yes button to proceed with the deletion of the record.