

# Delete System Call List Contact

Last Modified on 12/20/2024 10:24 am EST

To delete a Call List to an existing System, 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 the hyperlink of the desired Site.

| Site N.                 | Site Name  | Address        | City     | Sta... |
|-------------------------|------------|----------------|----------|--------|
| <a href="#">3719-01</a> | Emily Wood | 45722 Chandler | Plymouth | MI     |

The Site record opens. Click the Systems tab. A list of Systems attached to the Site is listed in the grid area. In the System Number column, click the hyperlink of the desired System.

The screenshot shows a software interface for a site record. At the top, the site is identified as "3719-01 - Emily Wood" with a location pin icon and "Active" status. Below this, there are two main sections: contact information and warranty details. The contact information includes the address "45722 Chandler, Plymouth, MI 48170", phone number "(734) 258-4646", and email "emilylwood@gmail.com". The RMR value is "\$1.00". The warranty details include "Warranty Start" (03/04/2022), "Warranty Labor" (Labor - 1 Year), "Warranty Part" (Parts - 1 Year), "Service Level" (SVC T&M RES), "Sales Tax" (Michigan), "Tax Rate" (6%), "Tax Exempt" (-), "Site Since" (03/04/2022), and "Inactive Date" (-).

Below the details is a navigation bar with tabs: Notes (0), **Systems (1)**, RMR (1), Work Orders (0), Site Parts (0), Contacts (0), Zones (0), Authorities (0), Docs, Custom Fields, Item Defaults, eForms, Part Ledger, and External. The "Systems" tab is highlighted with a green circle.

The Systems grid has a search bar, "+ Add System" button, "Export to Excel" button, and a "Show Inactive Systems" toggle. Below the grid, there is a message: "Drag a column header and drop it here to group by that column". The grid contains one item:

| System #                | System Type   | Panel Type           | Warranty Start |
|-------------------------|---------------|----------------------|----------------|
| <a href="#">9173-01</a> | Burglar Alarm | 8-Zone Control Panel | Mar 7, 2022    |

The "System #" cell for the first row is highlighted with a green circle. At the bottom of the grid, there is a pagination control showing "1" and a "Refresh" button.

The System record opens. Click the Call List tab. In the grid area, locate the call list contact to delete, and then click the Delete button (trashcan icon).

**9173-01 - Burglar Alarm** Active Emily Wood Emily Wood Edit Tasks History

Panel Type: Vista20P  
 Panel Location: Entry closet  
 Comments: -

Warranty Labor: Labor - 1 Year  
 Warranty Part: Parts - 1 Year  
 Warranty Start: 03/07/2022  
 Service Level: SVC T&M RES  
 Central Station: -  
 Account Number: 23-9173-01  
 Inactive Date: -

Notes: 0 | RMR: 1 | Work Orders: 1 | System Parts: 4 | **Call List: 1** | Zones: 2 | Documents | Archive | Custom Fields | eForms | Emails

[+ Add New Contact](#) [+ Add Existing Contact](#)

| Sort | Name        | Phone          | Cell           | Passcode    | Relationship | Email                |   |
|------|-------------|----------------|----------------|-------------|--------------|----------------------|---|
| 0    | Wood, Emily | (734) 258-4400 | (734) 258-3131 | thunderbird | Homeowner    | emilyLwood@gmail.com | <a href="#">Edit</a> <a href="#">Delete</a> |

1 - 1 of 1 items [Refresh](#)

A confirmation message box opens. Click Yes to delete the call list contact.

**Please confirm** ✕

Are you sure you want to delete this contact?

[Yes](#) [No](#)