

Delete a Marketing Source

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To delete a Marketing Source, from the main menu, arrive at the Marketing Sources setup with this path: Setup > Proposals > Marketing Sources.

The Marketing Sources list will be displayed. Locate the record you want to delete, and then click on the Delete button.

The screenshot shows the 'Marketing Sources' interface. At the top, there are two tabs: 'Primary Marketing Sources' (selected) and 'Secondary Marketing Sources'. Below the tabs is a '+ Add Primary Marketing Source' button and a toggle switch for 'Show inactive market source' (currently off). The main area contains a table with columns for 'Code', 'Name', and 'Action'. The 'Action' column contains 'Edit' and 'Delete' buttons for each row. The 'Delete' button for the 'Google' row is circled in green. At the bottom, there is a pagination control showing '1' and a 'Refresh' button.

Code	Name	Action
Google	Google	Edit Delete
Social Media	Social Media	Edit Delete
Advertisements	Advertisements	Edit Delete
Yellow Pages	Yellow Pages	Edit Delete
TV	TV	Edit Delete
Consumer Reviews	Consumer Reviews	Edit Delete
Event	Event	Edit Delete
Mail	Mail	Edit Delete
Email	Email	Edit Delete
Radio	Radio	Edit Delete
Referral	Referral	Edit Delete
Cold Call	Cold Call	Edit Delete
Yard Sign	Yard Sign	Edit Delete
Existing Customer	Existing Customer	Edit Delete
Other	Other	Edit Delete

A confirmation message will be displayed. If the Marketing Source has never been used on a Proposal, the record will be deleted. If the Marketing Source has been used on a Proposal, the record will be marked as inactive. Click on the Yes button to confirm the deletion/inactivation of the record.

Please confirm ✕

Are you sure you want to delete?
