

Delete Prospect

1. From **CRM** module, click **Sales Entities**. Sales Entity screen will appear.
2. Open Prospect you want to delete.

Prospect - Sample Prospect 1

New Save Search Delete Undo Convert Additional Close

Entity Prospect General Locations Contacts Split History Messages Activities Attachments Audit Log Entity Type

Name * Sample Prospect 1 Phone Entity No 1006456

Contact Name Sample Prospect 1_Contact Suffix Email Prospect@test.com Mobile

Class

Location Name 01 Printed Name Sample Prospect 1

Search Address Enter address to search...

Address Makati, PH

City Makati State PH

Zip/Postal 1002 Country Philippines

Time Zone (UTC+08:00) Kuala Lumpur, Sin Language English

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Line of Business

+ Insert X Remove Types

Line of Business Salesperson

Contact Information

+ Insert X Remove Types

Type* Details*

Internal Notes

? 4.74s | Saved Page 1 of 1 Refresh

3. To delete the Prospect, click **Delete** button.

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Are you sure you want to delete this record?

Yes No

4. Click **Yes** to proceed.
5. If the Prospect is used in any transaction, deletion will not proceed and this will appear:



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The record you are trying to delete is being used. The entity has been set to inactive.

OK