

How to delete Customers on SortMyBooks Online.

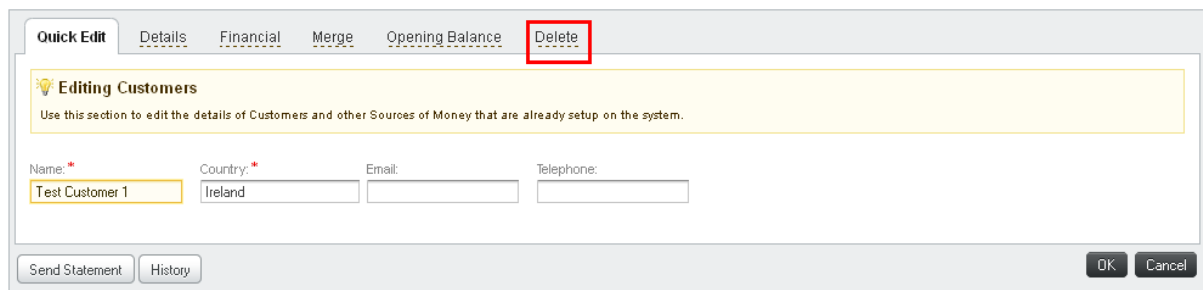
1. Click on Sales, then Customers.



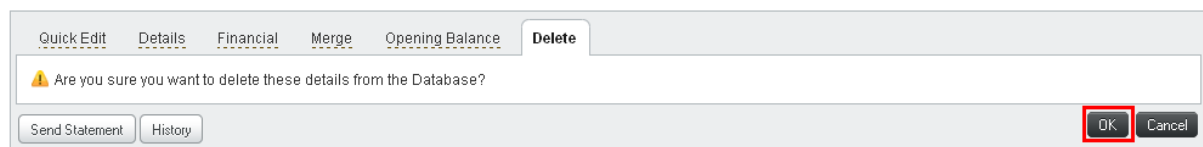
2. Click on the Customer that you want to delete – In this case we are deleting “Test Customer 1” – This will open up their details.

| Name | Type | Total Due | Email | Telephone | Last Sale | Total Sales |
|-----------------|----------|-----------|-------|-----------|-----------|-------------|
| Test Customer 1 | Customer | 0.00 | | | 1.23 | 1.23 |
| Test Customer 2 | Customer | 0.00 | | | 2,460.00 | 2,460.00 |
| Test Customer 3 | Customer | 0.00 | | | 0.00 | 0.00 |
| Test Customer 4 | Customer | 0.00 | | | 0.00 | 0.00 |

3. Click on the Delete tab at the top.



4. This will just ask you if you are sure you want to delete the Customer. Click OK if you are. This will take you back to the Customers screen and that Customer will not be there.



Note: The system will not let you delete a Customer if there are still records associated with them. If that is the case you will see this message:



If you see this message you will need to either leave the Customer on the system or remove those records and then try the delete process again. The records could be Quotes, Sales Invoices, Credit Notes, Lodgements or Refunds.