

bee2link

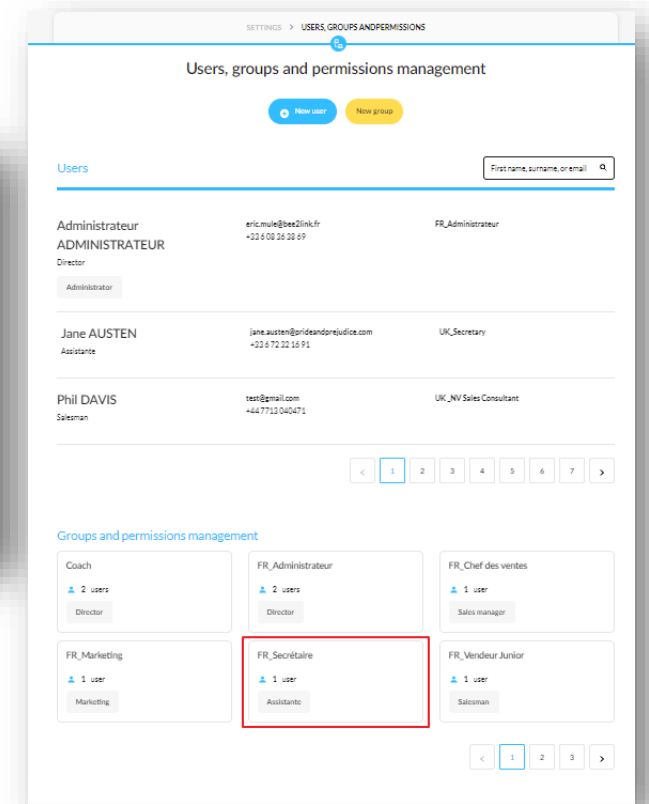
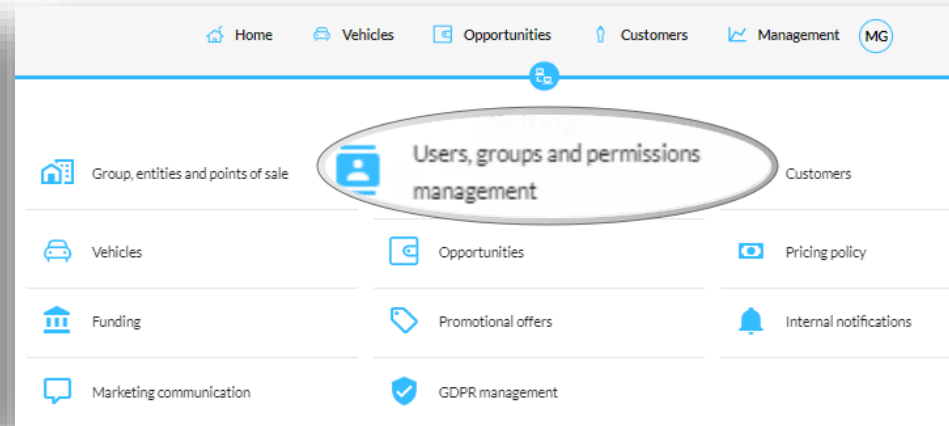
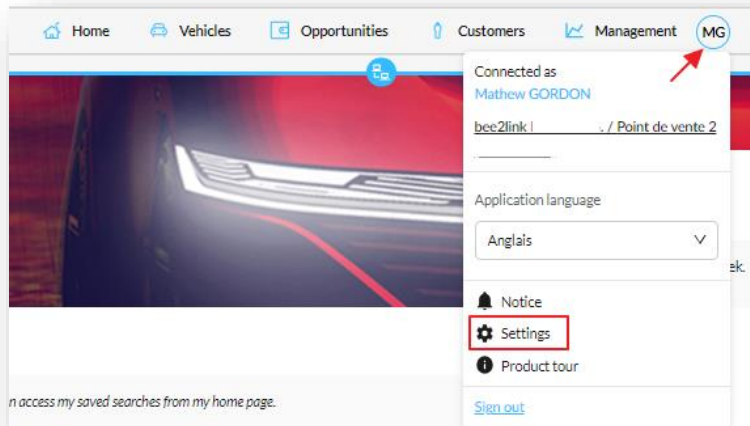
How to remove a client's data file?



OpenFlex

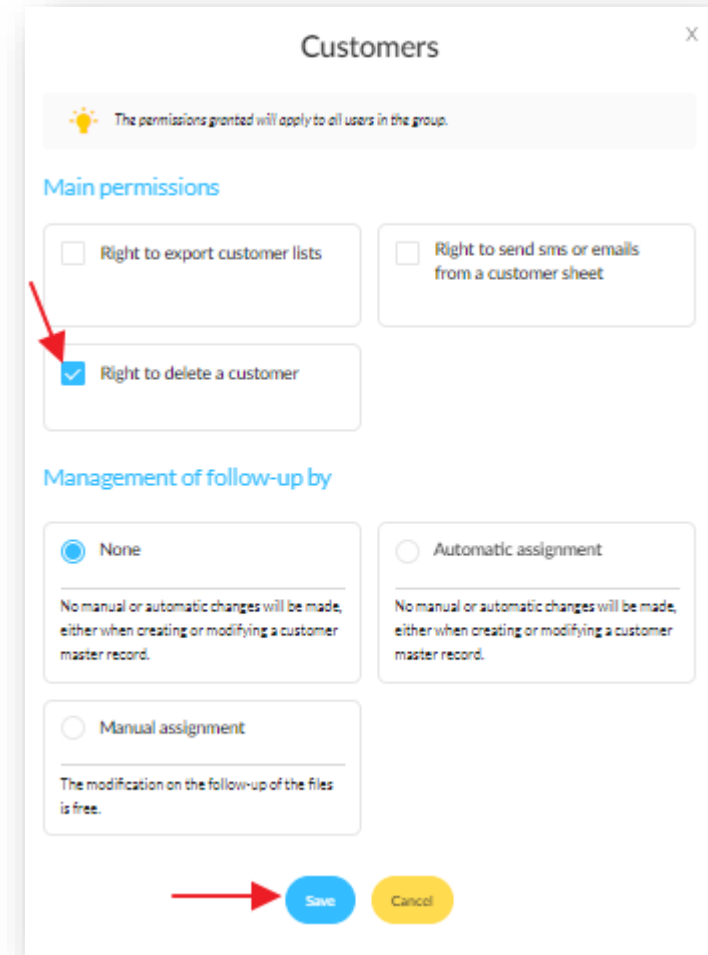
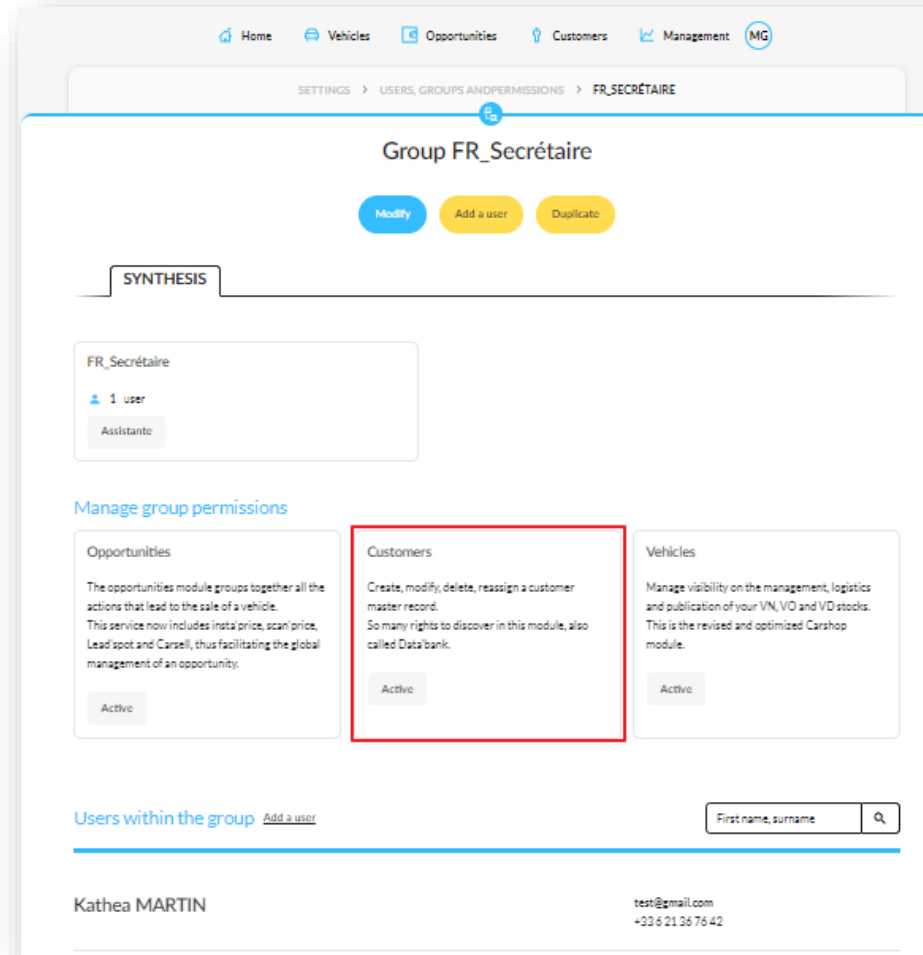
Prerequisite: having the right to delete a customer record

- As platform administrator, you can give a group of users the right to delete a customer file.
- By default, the "Marketing" type profiles are the only group that will have this right upon creation.
- Click on your initials and choose « Settings»
- Then enter the parameters for managing users, groups and rights.
- Next, select the group to which you wish to give deletion rights.



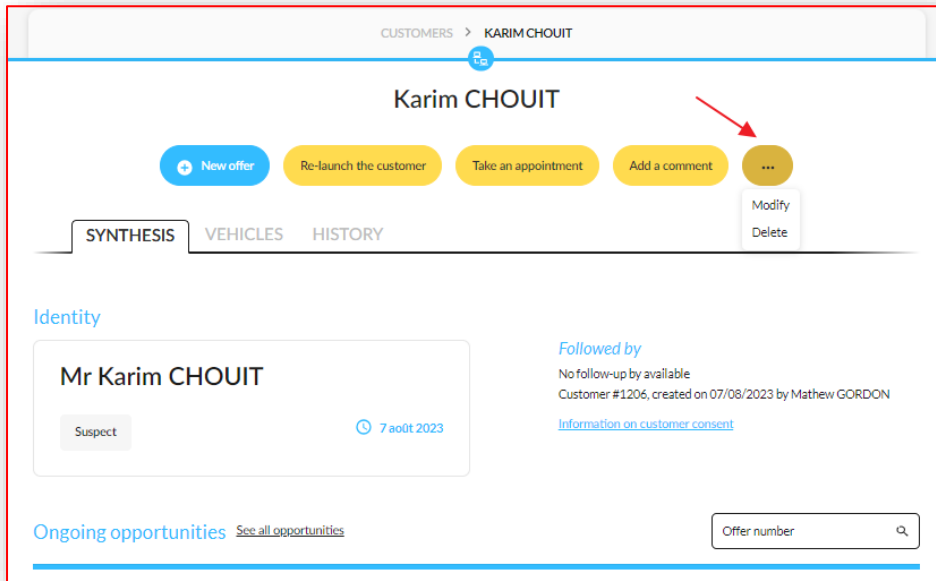
☛ Within the group, choose the module « **Clients** ».

☛ By ticking « **Right to delete a customer** », you give this group the right to delete a customer file.

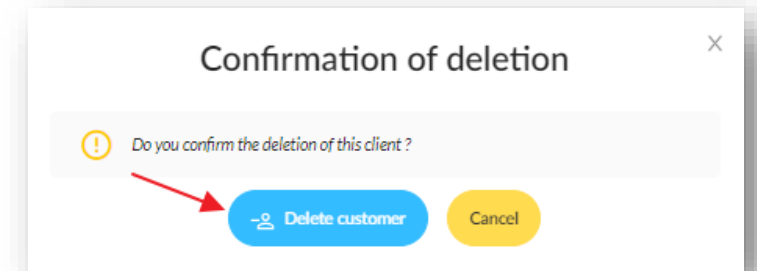


🔗 The user group in question will now have access to an additional button on the customer file:

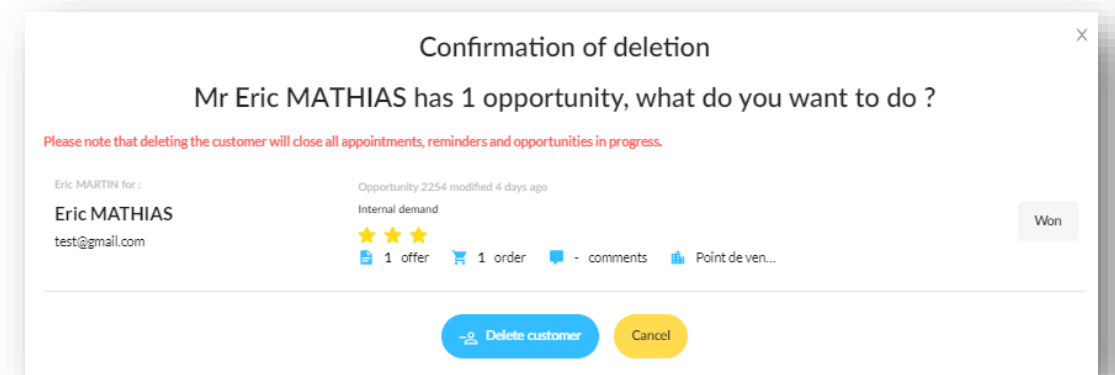
🔗 By clicking on the button , the option « **Delete** » will be available.



🔗 A confirmation will be requested to validate the deletion.



🔗 If there is an **opportunity in progress** with this customer, you will be notified.



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