When a customer asks for their records, or to be deleted

A customer can ask for everything you hold about them, or ask to be erased.

Steps

1. Open the customer.
2. Press Download everything held about them to get their whole record to send them.
3. To erase them, press Erase this customer and confirm. This cannot be undone.

Good to know

The record that they asked not to be texted is kept even after erasing, so they are never texted again.

Only roles allowed to see or erase a customer’s whole record have these buttons.

https://orshihq.com/help/customer-records