

Delete Customer Documents

Last Modified on 04/28/2022 10:26 am EDT

A user may delete a document if they have been granted the appropriate user permissions.

! Use caution when deleting a document. Once the Delete button is clicked, the document is **permanently** deleted from the database. No warning or confirmation message is presented to the user prior to the document deletion.

To delete a Customer Document, you must first access the customer record.

From the main menu, arrive at the Customers list with this path: Accounts Receivable> Customers.

The Customers list will be displayed. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.

Customer #	Name	Address	City	State	Balance Due	Total RMR
3654	Holmes Fans	10556 Washington Street	Chagrin Falls	OH	\$0.00	\$0.00
3652	Cactus World	3601 Saguaro Street	Tucson	AZ	\$0.00	\$0.00
3505	Smith, Aaron	123 Main St	Columbus	OH	\$182.81	\$30.00
3504	Allen Automotive Services	634 Morgan Street	Cincinnati	OH	\$182.81	\$30.00
3502	Tesay	Address1	City	OH	\$0.00	\$0.00
3499	Edwards Security	345 Main Street	Columbus	OH	\$221.47	\$55.00
3498	Crafted Crates	233 Widmore Ave	Columbus	OH	\$222.56	\$30.00

The Customer record will be displayed. Click on the Documents tab. Locate the document, and then click on the Delete button (trashcan icon). The document will be removed from the grid area.

Emily Wood

Customer #3703 Active Normal Residential-Owner - Since 3/7/22

Edit
Tasks
History

Total Balance Due Total RMR

\$0.00 \$0.00

Customer Aging

— Current
 — 1-30 Days
 — 31-60 Days
 — 61-90 Days
 — 91+

Address	45722 Chandler Phoenix, AZ 85003	Salesperson	Dian Brown
Phone		Last Statement	
Cell		Default Term	
Email	emilylwood@gmail.com	Delivery Method	Print
		Delivery RMR Inv	<input checked="" type="checkbox"/>

● Comments

Invoices 1
Credits 0
Sites/Systems 11
RMR 2
Work Orders 1
Proposals 0
Payments 0
CC/Check
Notes 5
Contacts 3
Documents
Archive
Custom Fields
eForms
Email

Select files...
Drop files here to select
*Max file size 5MB
 Show deleted documents

File Name	Type	Security	Modified Date	
Customer Document - Rev04.pdf		Customer	Mar 21, 2022, 10:06:43 AM	<div style="display: flex; gap: 5px;"> Replace Download 🗑️ </div>
Customer Document - Rev03.pdf		Customer	Mar 21, 2022, 10:06:43 AM	<div style="display: flex; gap: 5px;"> Replace Download 🗑️ </div>
Customer Document - Rev02.pdf		Customer	Mar 21, 2022, 9:47:59 AM	<div style="display: flex; gap: 5px;"> Replace Download 🗑️ </div>
Customer Document - Rev01.pdf		Customer	Mar 20, 2022, 11:56:10 PM	<div style="display: flex; gap: 5px;"> Replace Download 🗑️ </div>

⏪ ⏩ ↻
0 - 0 of 0 Items ↻ Refresh