

Delete Customer Documents

Last Modified on 12/12/2024 2:26 pm EST

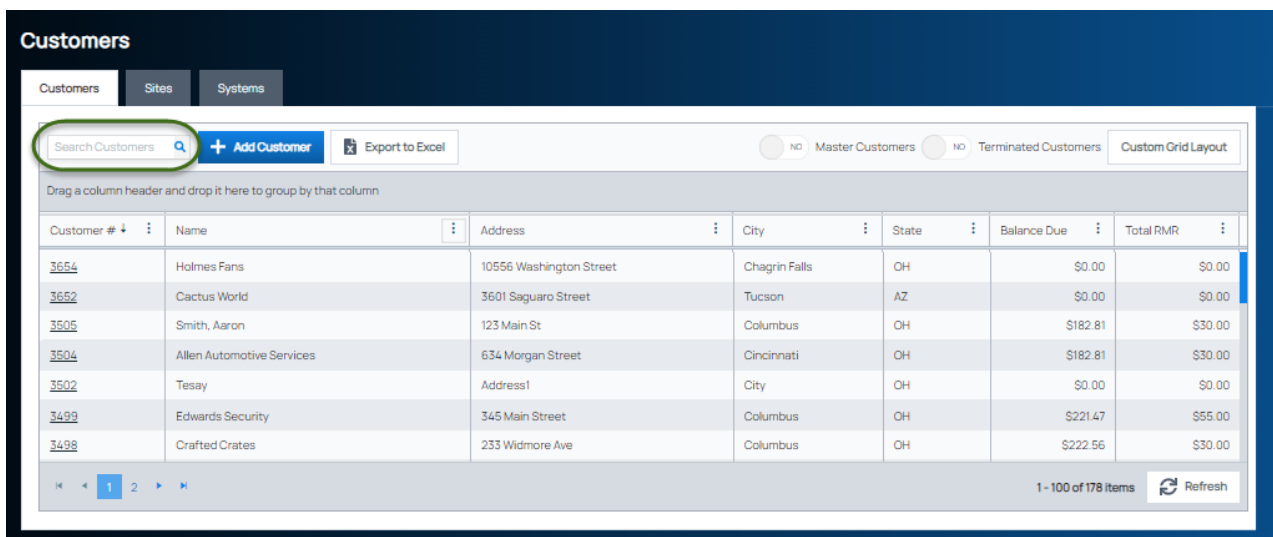
You can delete a document if you have been granted the appropriate user permissions.

⚠ Use caution when deleting a document. Once you click 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: CRM > Customers.

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



The screenshot shows a web application interface for managing customers. At the top, there are tabs for 'Customers', 'Sites', and 'Systems'. Below the tabs is a search bar labeled 'Search Customers' with a magnifying glass icon, a blue '+ Add Customer' button, and an 'Export to Excel' button. There are also radio buttons for 'Master Customers' and 'Terminated Customers', and a 'Custom Grid Layout' button. Below this is a table with columns: Customer #, Name, Address, City, State, Balance Due, and Total RMR. The table contains several rows of customer data. At the bottom, there is a pagination bar showing '1 - 100 of 178 items' and a 'Refresh' button.

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 opens. Click on the Documents tab. Locate the document, and then click the **Delete** button (trashcan icon). The document is 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

1.2
1
0.8
0.6
0.4
0.2
0

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

Address 45722 Chandler
Phoenix, AZ 85003

Phone
Cell
Email emily.wood@gmail.com

Salesperson Dan Brown
Last Statement
Default Term
Delivery Method
Delivery RMR Inv YES

Print

Comments

Documents

Invoices 1 Credits 0 Sites/Systems 1/1 RMR 2 Work Orders 1 Proposals 0 Payments 0 CC/eCheck 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	Replace Download 🗑️
Customer Document - Rev03.pdf		Customer	Mar 21, 2022, 10:06:43 AM	Replace Download 🗑️
Customer Document - Rev02.pdf		Customer	Mar 21, 2022, 9:47:59 AM	Replace Download 🗑️
Customer Document - Rev01.pdf		Customer	Mar 20, 2022, 11:56:10 PM	Replace Download 🗑️

0 - 0 of 0 items Refresh