Delete Customer Documents

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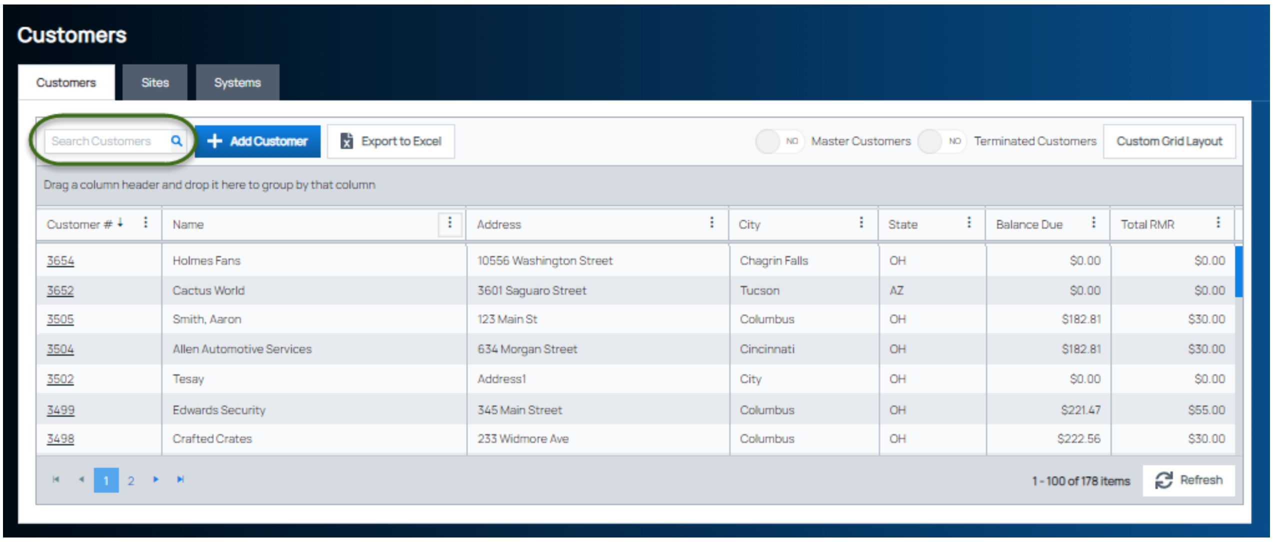
You can delete a document if you have been granted the appropriate user permissions.

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.

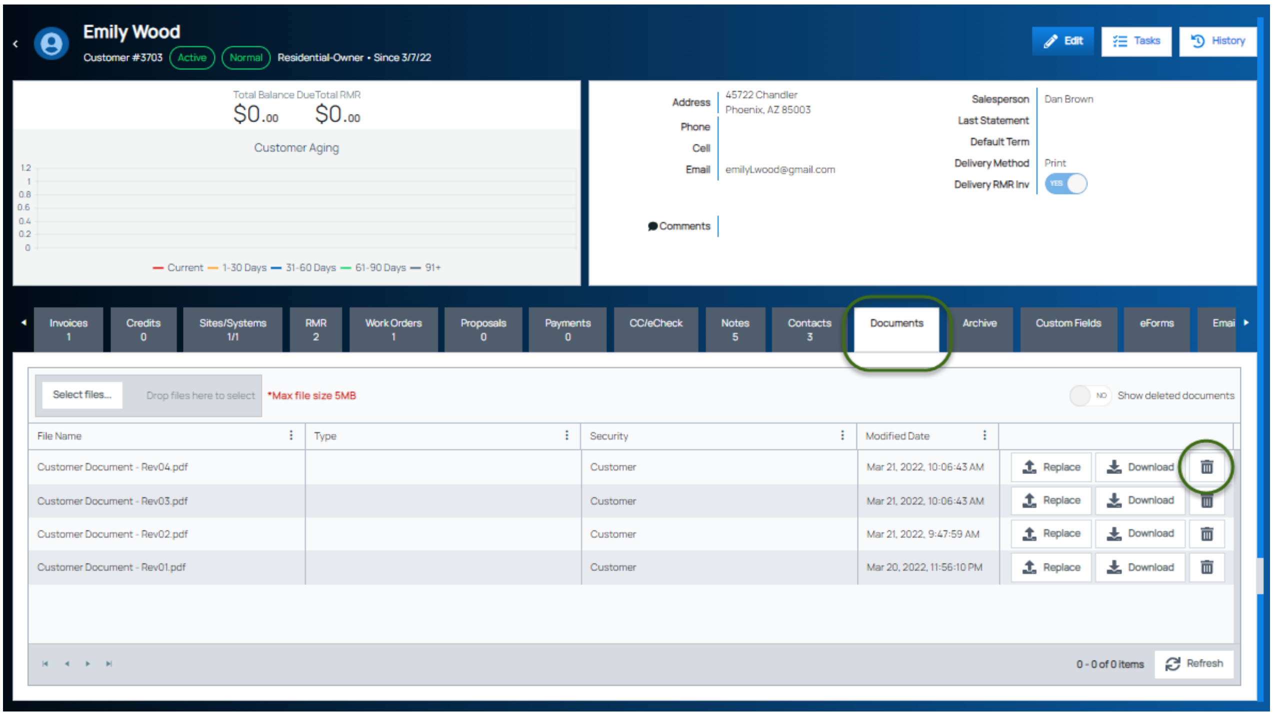
To delete a Customer Document, you must first access the customer record.

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 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 $0.00
Total RMR $0.00
Customer Aging
Current 1-30 Days 31-60 Days 61-90 Days 91+
Address 45722 Chandler Phoenix, AZ 85003
Phone
Cell
Email emilyLwood@gmail.com
Comments
Salesperson Dan Brown
Last Statement
Default Term
Delivery Method Print
Delivery RMR Inv
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
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
Customer Document - Rev02.pdf
Customer
Mar 21, 2022, 9:47:59 AM
Customer Document - Rev01.pdf
Customer
Mar 20, 2022, 11:56:10 PM
0 - 0 of 0 items
Refresh