Delete Site Documents

Last Modified on 05/01/2022 6:24 am EDT

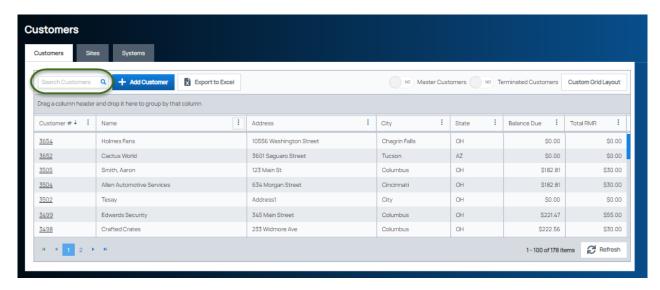
A user may delete a document if they have been granted the appropriate user permissions.

⚠ 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.

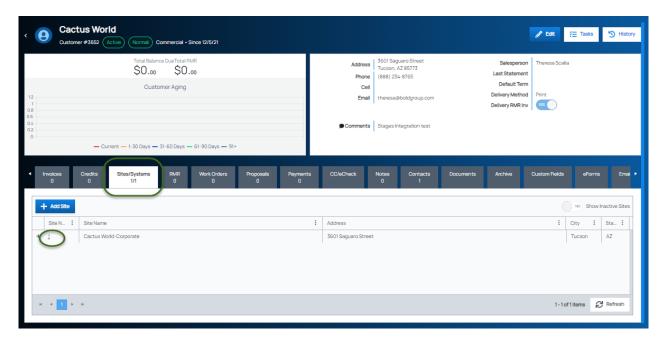
To delete a Site Document, you must first access the customer record.

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.



The Customer record will be displayed. Click on the Sites/Systems tab, and then in the Site Number column, click on the hyperlink of the Site for which you want to delete a document.



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

