

Delete Site Documents

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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.

Customer #	Name	Address	City	State	Balance Due	Total RMR
3654	Holmes Fans	10596 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 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.

Site N.	Site Name	Address	City	Sta.
1	Cactus World - Corporate	3601 Saguaro Street	Tucson	AZ

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.

The screenshot shows a software interface for a site record. At the top, the site is identified as "1 - Emily Wood" with the address "45722 Chandler, Phoenix, AZ 85003" and contact information "emilylwood@gmail.com". The RMR value is \$2.00. A navigation bar includes tabs for Notes, Systems, RMR, Work Orders, Site Parts, Contacts, Zones, Authorities, Docs, Custom Fields, Item Defaults, eForms, Part Ledger, and External. The "Docs" tab is selected and highlighted with a green circle. Below the tabs is a file upload area with a "Select files..." button and a "Drop files here to select" instruction, with a note that the maximum file size is 5MB. A table lists documents, with one entry "Site Document.pdf" having a "Delete" button (trashcan icon) circled in green. The interface also shows a "Show deleted documents" toggle and a "Refresh" button at the bottom right.

File Name	Type	Security	Modified Date	Actions
Site Document.pdf		Customer	Mar 20, 2022, 11:57:44 PM	Replace Download Delete