

Delete Site Documents

Last Modified on 12/16/2024 2:45 pm EST

You can delete a document if you 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: CRM |e> 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.

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 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 opens. Click on the Docs tab. Locate the document, and then click the Delete button (trashcan icon). The document is removed from the grid area.

The screenshot shows a software interface for a site record. At the top, the site name is "1 - Emily Wood" with a location pin icon and "Active" status. Below this, there are contact details: "45722 Chandler, Phoenix, AZ 85003", "RMR \$2.00", and "emilylwood@gmail.com". To the right, there are warranty and tax details:

Warranty Start	03/07/2022	Sales Tax	No Tax
Warranty Labor	1 Year Parts & Labor	Tax Rate	0.0000%
Warranty Part	1 Year Parts & Labor	Tax Exempt	-
Service Level	SVC T&M RES	Site Since	03/07/2022
		Inactive Date	-

Below the details is a navigation bar with tabs: Notes (2), Systems (1), RMR (2), Work Orders (1), Site Parts (0), Contacts (1), Zones (0), Authorities (0), Docs (highlighted with a green circle), Custom Fields, Item Defaults, eForms, Part Ledger, and External.

The "Docs" tab is active, showing a file upload area with "Select files..." and "Drop files here to select" (with a red note: "*Max file size 5MB"). Below this is a table of documents:

File Name	Type	Security	Modified Date	Actions
Site Document.pdf		Customer	Mar 20, 2022, 11:57:44 PM	Replace, Download, Delete (trashcan icon highlighted with a green circle)

At the bottom of the interface, there is a pagination bar showing "1 - 1 of 1 Items" and a "Refresh" button.