

# Delete System Documents

Last Modified on 12/20/2024 10:05 am EST

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

**⚠** Use caution when deleting a document. Once the Delete button is clicked, the document is **permanently** deleted from the database. There is no warning or confirmation message before the document is deleted.

To delete a System 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 the hyperlink in the Customer # column to open the customer record.

Customer #	Name	Address	City	State	Balance Due	Total RMR
<a href="#">3654</a>	Holmes Fans	10556 Washington Street	Chagrin Falls	OH	\$0.00	\$0.00
<a href="#">3652</a>	Cactus World	3601 Saguaro Street	Tucson	AZ	\$0.00	\$0.00
<a href="#">3505</a>	Smith, Aaron	123 Main St	Columbus	OH	\$182.81	\$30.00
<a href="#">3604</a>	Allen Automotive Services	634 Morgan Street	Cincinnati	OH	\$182.81	\$30.00
<a href="#">3502</a>	Tesay	Address1	City	OH	\$0.00	\$0.00
<a href="#">3499</a>	Edwards Security	345 Main Street	Columbus	OH	\$221.47	\$55.00
<a href="#">3498</a>	Crafted Crates	233 Widmore Ave	Columbus	OH	\$222.56	\$30.00

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

Site N.	Site Name	Address	City	Sta...
<a href="#">1</a>	Cactus World-Corporate	3601 Saguaro Street	Tucson	AZ

The Site record opens. Click the Systems tab.

1 - Emily Wood  
Active Emily Wood - 3703

45722 Chandler, Phoenix, AZ 85003  
emilylwood@gmail.com

RMR \$2.00

Warranty Start: 03/07/2022  
Warranty Labor: 1 Year Parts & Labor  
Warranty Part: 1 Year Parts & Labor  
Service Level: SVC-TSM RES

Sales Tax: No Tax  
Tax Rate: 0.0000%  
Tax Exempt: -  
Site Since: 03/07/2022  
Inactive Date: -

Notes: 1 | **Systems: 1** | RMR: 2 | Work Orders: 1 | Site Parts: 0 | Contacts: 1 | Zones: 0 | Authorities: 0 | Docs: 0 | Custom Fields: 0 | Item Defaults: 0 | eForms: 0 | Part Ledger: 0 | External: 0

+ Add New Contact + Add Existing Contact

Sort	Name	Phone	Cell	Passcode	Relationship	Email	
0	Wilson, Glenn	(602) 313-6588			Neighbor		<a href="#">Edit</a> <a href="#">Delete</a>

1 - 1 of 1 items Refresh

A list of Systems attached to the Site is listed in the grid area. In the System Number column, click the hyperlink of the System for which you want to delete a document.

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Sales Tax: No Tax  
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Tax Exempt: -  
Site Since: 03/07/2022  
Inactive Date: -

Notes: 2 | **Systems: 1** | RMR: 2 | Work Orders: 1 | Site Parts: 0 | Contacts: 1 | Zones: 0 | Authorities: 0 | Docs: 0 | Custom Fields: 0 | Item Defaults: 0 | eForms: 0 | Part Ledger: 0 | External: 0

Search Systems + Add System Export to Excel Show Inactive Systems Custom Grid Layout

Drag a column header and drop it here to group by that column

System #	System Type	Panel Type	Warranty Start
<a href="#">3703-01</a>	Burglar Alarm	8-Zone Control Panel	Mar 7, 2022

1 - 1 of 1 items Refresh

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

**3703-01 - Burglar Alarm**  
Active Emily Wood Emily Wood


Edit Tasks History

Panel Type	Vista20P	Warranty Labor	1 Year Parts & Labor
Panel Location	-	Warranty Part	1 Year Parts & Labor
Comments	-	Warranty Start	03/07/2022
		Service Level	SVC T&M RES
		Central Station	-
		Account Number	23-3703-01
		Inactive Date	-

Notes 2 RMR 0 Work Orders 1 System Parts 0 Call List 0 Zones 0 Utilities

Documents Archive Custom Fields eForms Emails

Select files... Drop files here to select \*Max file size 5MB Show deleted documents

File Name	Type	Security	Modified Date	
System Document.pdf		Customer	Mar 21, 2022, 12:00:47 AM	Replace Download 

1 - 1 of 1 items Refresh