

# Delete System Documents

Last Modified on 05/01/2022 6:22 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 System Document, you must first access the customer record.

From the main menu, arrive at the Customers list with this path: Accounts Receivable> Customers.

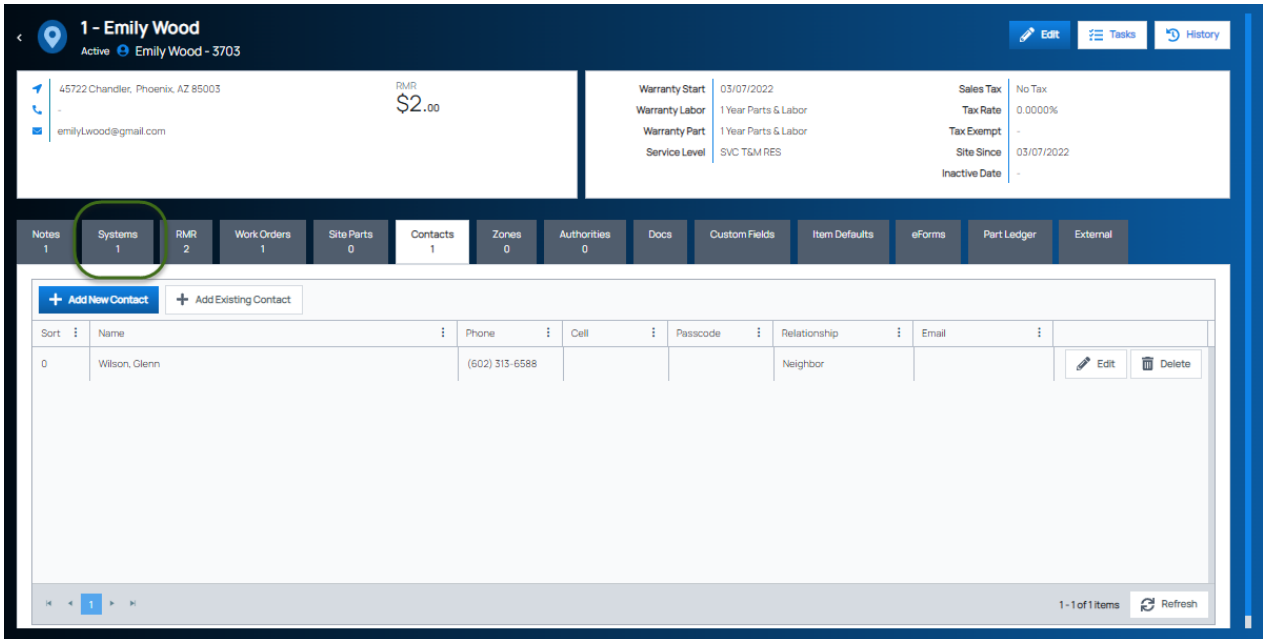
The Customers list will be displayed. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.

Customer #	Name	Address	City	State	Balance Due	Total RMR
<a href="#">3654</a>	Holmes Fans	10596 Washington Street	Chagrin Falls	OH	\$0.00	\$0.00
<a href="#">3652</a>	Cactus World	3601 Saguario Street	Tucson	AZ	\$0.00	\$0.00
<a href="#">3505</a>	Smith, Aaron	123 Main St	Columbus	OH	\$182.81	\$30.00
<a href="#">3504</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

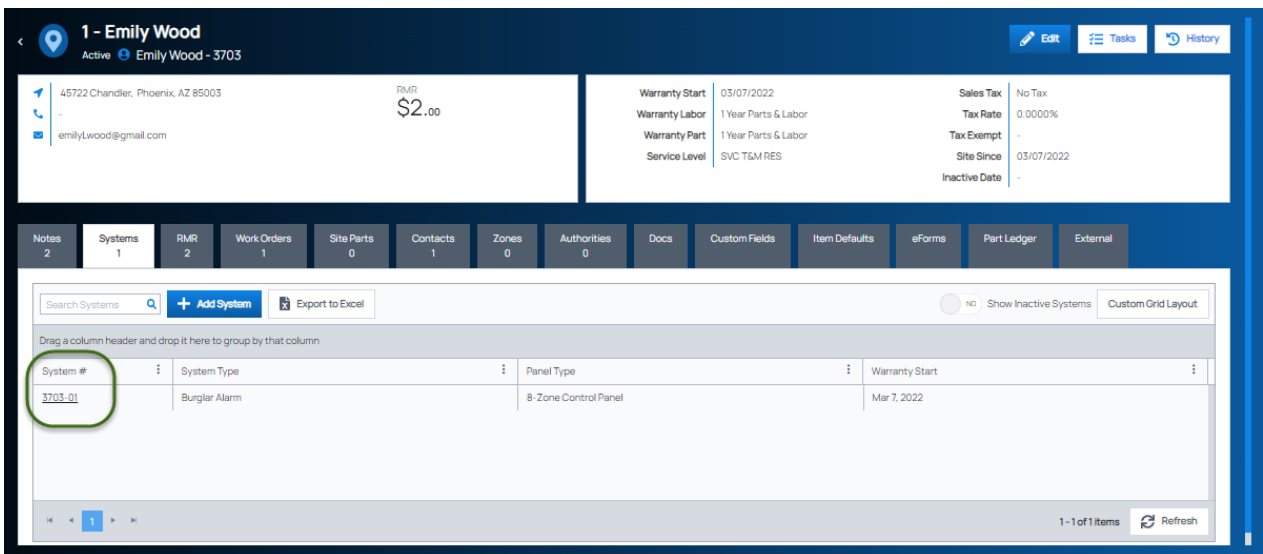
The Customer record will be displayed. Click on the Sites/Systems tab, and then in the Site Number column, click on the hyperlink of the Site linked to the System for which you want to delete a document.

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

The Site record will be displayed. Click on the Systems tab.



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



The System record will be displayed. Click on the Utilities tab, and then click on the Documents tab. Locate the document, and then click on the Delete button (trashcan icon). The document will be 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  NO Show deleted documents

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

1 - 1 of 1 items Refresh