Delete Work Order Documents

Last Modified on 05/05/2022 2:26 pm EDT

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

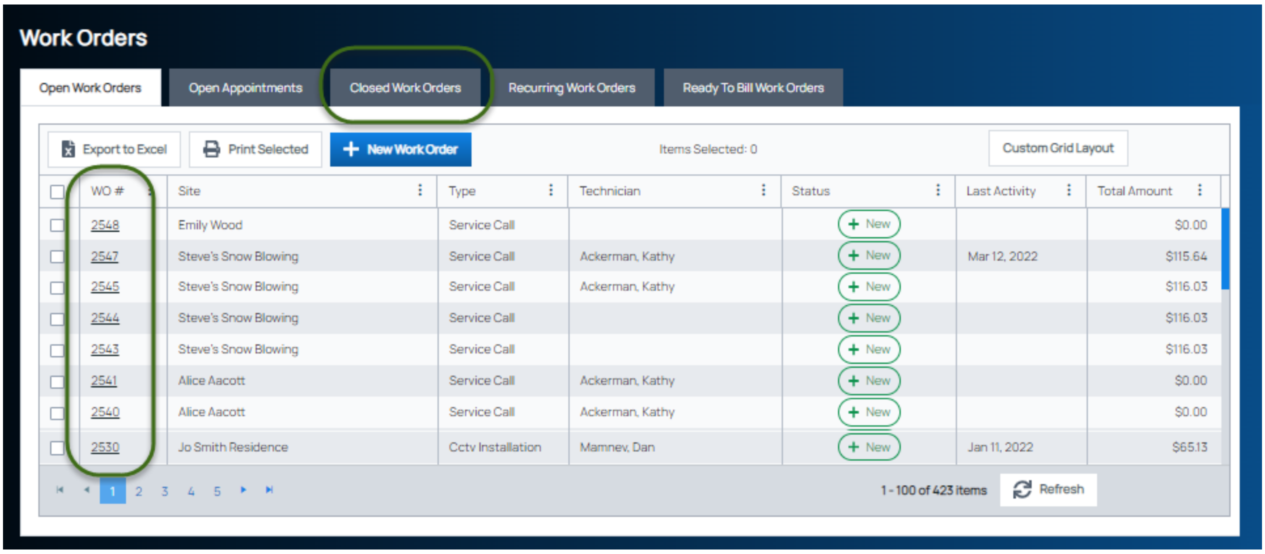
Use caution when deleting a document. Once the Delete button is clicked, the document is **permanently** deleted from the database. No warning or confirmation message is presented to the user prior to the document deletion.

To delete a Work Order Document, you must first access the work order record.

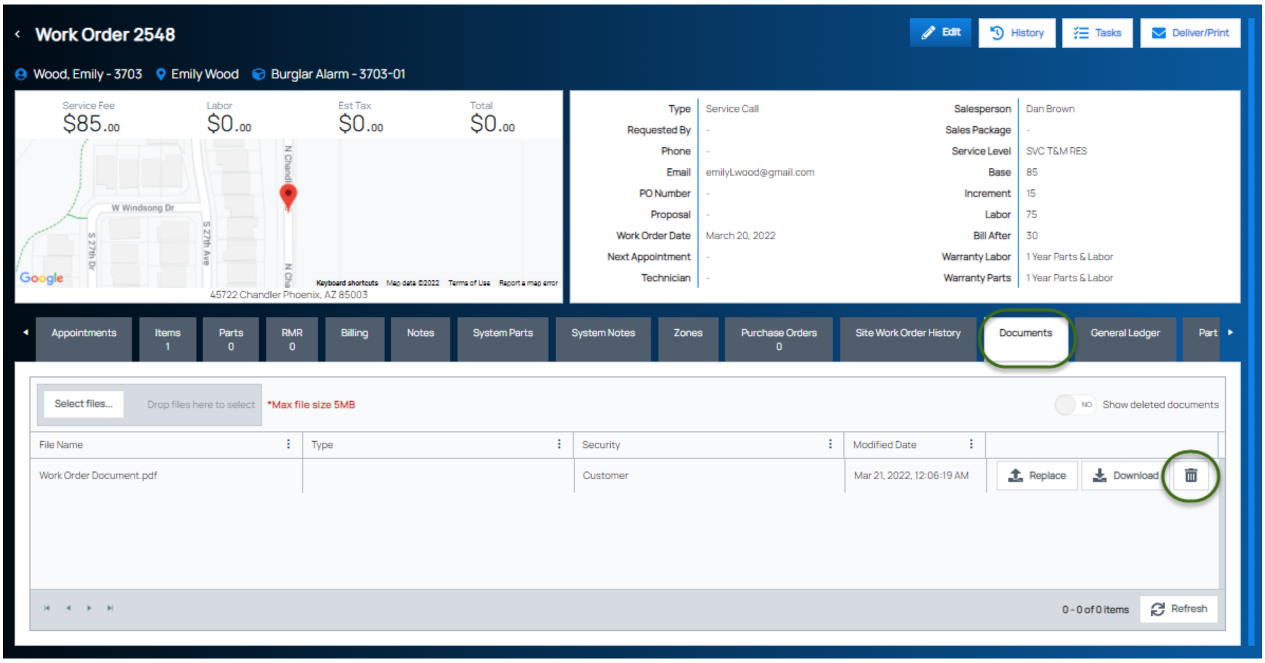
From the main menu, arrive at the Customers list with this path: Accounts Receivable> Work Orders.

The Work Orders List will be displayed. In the WO# column, click on the hyperlink of the Work Order for which you want to replace a Document.

If the Work Order has been closed, click on the Closed Work Orders tab to locate the work order.



The Work Order record will be displayed. 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.



Work Order 2548
Edit
History
Tasks
Deliver/Print
Wood, Emily - 3703
Emily Wood
Burglar Alarm - 3703-01
Service Fee
$85.00
Labor
$0.00
Est Tax
$0.00
Total
$0.00
W Windsong Dr
45722 Chandler Phoenix, AZ 85003
Type Service Call
Requested By -
Phone -
Email emilyLwood@gmail.com
PO Number -
Proposal -
Work Order Date March 20, 2022
Next Appointment -
Technician -
Salesperson Dan Brown
Sales Package -
Service Level SVC T&M RES
Base 85
Increment 15
Labor 75
Bill After 30
Warranty Labor 1 Year Parts & Labor
Warranty Parts 1 Year Parts & Labor
Appointments
Items 1
Parts 0
RMR 0
Billing
Notes
System Parts
System Notes
Zones
Purchase Orders 0
Site Work Order History
Documents
General Ledger
Part
Select files...
Drop files here to select
*Max file size 5MB
Show deleted documents
File Name
Type
Security
Modified Date
Work Order Document.pdf
Customer
Mar 21, 2022, 12:06:19 AM
Replace
Download
0 - 0 of 0 items
Refresh