

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 screenshot shows the 'Work Orders' interface. At the top, there are five tabs: 'Open Work Orders', 'Open Appointments', 'Closed Work Orders', 'Recurring Work Orders', and 'Ready To Bill Work Orders'. The 'Closed Work Orders' tab is highlighted with a green circle. Below the tabs is a toolbar with 'Export to Excel', 'Print Selected', and '+ New Work Order' buttons. The main area contains a table with columns: 'WO #', 'Site', 'Type', 'Technician', 'Status', 'Last Activity', and 'Total Amount'. The 'WO #' column contains a list of work order numbers: 2548, 2547, 2546, 2544, 2543, 2541, 2540, and 2530. The 'Status' column contains a '+ New' button for each row. The 'Last Activity' column shows dates: 'Mar 12, 2022' and 'Jan 11, 2022'. The 'Total Amount' column shows values: '\$0.00', '\$115.64', '\$116.03', '\$116.03', '\$116.03', '\$0.00', '\$0.00', and '\$6513'. At the bottom, there is a pagination bar showing '1 - 100 of 423 items' and a 'Refresh' button.

WO #	Site	Type	Technician	Status	Last Activity	Total Amount
2548	Emily Wood	Service Call		+ New		\$0.00
2547	Steve's Snow Blowing	Service Call	Ackerman, Kathy	+ New	Mar 12, 2022	\$115.64
2546	Steve's Snow Blowing	Service Call	Ackerman, Kathy	+ New		\$116.03
2544	Steve's Snow Blowing	Service Call		+ New		\$116.03
2543	Steve's Snow Blowing	Service Call		+ New		\$116.03
2541	Alice Aacott	Service Call	Ackerman, Kathy	+ New		\$0.00
2540	Alice Aacott	Service Call	Ackerman, Kathy	+ New		\$0.00
2530	Jo Smith Residence	Cctv Installation	Mamnev, Dan	+ New	Jan 11, 2022	\$6513

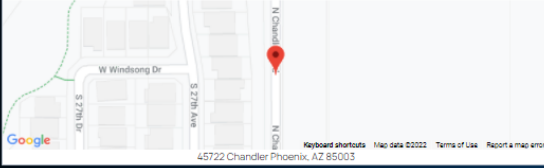
The Work Order record will be displayed. Click on the Documents tab. Locate the document, and then click on the Delete button (trashcan icon). The document will be removed from the grid area.

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



Type	Service Call	Salesperson	Dan Brown
Requested By	-	Sales Package	-
Phone	-	Service Level	SVC T&M RES
Email	emilylwood@gmail.com	Base	85
PO Number	-	Increment	15
Proposal	-	Labor	75
Work Order Date	March 20, 2022	Bill After	30
Next Appointment	-	Warranty Labor	1 Year Parts & Labor
Technician	-	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