

Delete a Work Order Document

Last Modified on 12/16/2024 2:59 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 Work Order 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 on the hyperlink in the Customer # column to open the customer record.

The screenshot shows the 'Customers' list interface. At the top, there are tabs for 'Customers', 'Sites', and 'Systems'. Below the tabs is a search bar labeled 'Search Customers' with a magnifying glass icon, a blue '+ Add Customer' button, and an 'Export to Excel' button. To the right of the search bar are radio buttons for 'Master Customers' and 'Terminated Customers', and a 'Custom Grid Layout' button. Below the search bar is a message: 'Drag a column header and drop it here to group by that column'. The main table has the following columns: Customer #, Name, Address, City, State, Balance Due, and Total RMR. The first row is highlighted in blue. The table footer shows '1 - 100 of 178 Items' and a 'Refresh' button.

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 Work Orders tab. A list of all open Work Orders is displayed. In the WO# column, click on the hyperlink of the Work Order for which you want to delete a Document.

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

Emily Wood
Customer #3703 Active Normal Residential-Owner - Since 3/7/22

Total Balance Due Total RMR
\$0.00 \$0.00

Customer Aging

Address: 45722 Chandler Phoenix, AZ 85003
Phone
Cell
Email: emilyLwood@gmail.com

Salesperson: Dan Brown
Last Statement
Default Term
Delivery Method: Print
Delivery RMR Inv:

Comments

Invoices: 1 Credits: 0 Sites/Systems: 1/1 RMR: 2 **Work Orders: 1** Proposals: 0 Payments: 0 CC/eCheck: Notes: 4 Contacts: 3 Documents: Archive: Custom Fields: eForms: Email

+ New Work Order Show Closed Work Orders Show Recurring Work Orders

WO #	Site	System	Type	Status	Last Activity	System	Type	Status	Last Activity
2548	Emily Wood	Burglar Ala...	Service Call	New		Burglar Ala...	Service Call	New	

1 - 1 of 1 items Refresh

The Work Order record opens. Click on the Documents tab. Locate the document, and then click the Delete button (trashcan icon). The document is 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
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	Actions
Work Order Document.pdf		Customer	Mar 21, 2022, 12:06:19 AM	Replace Download Delete

0 - 0 of 0 items Refresh