Delete a Work Order Document

Last Modified on 12/16/2024 2:59 pm EST

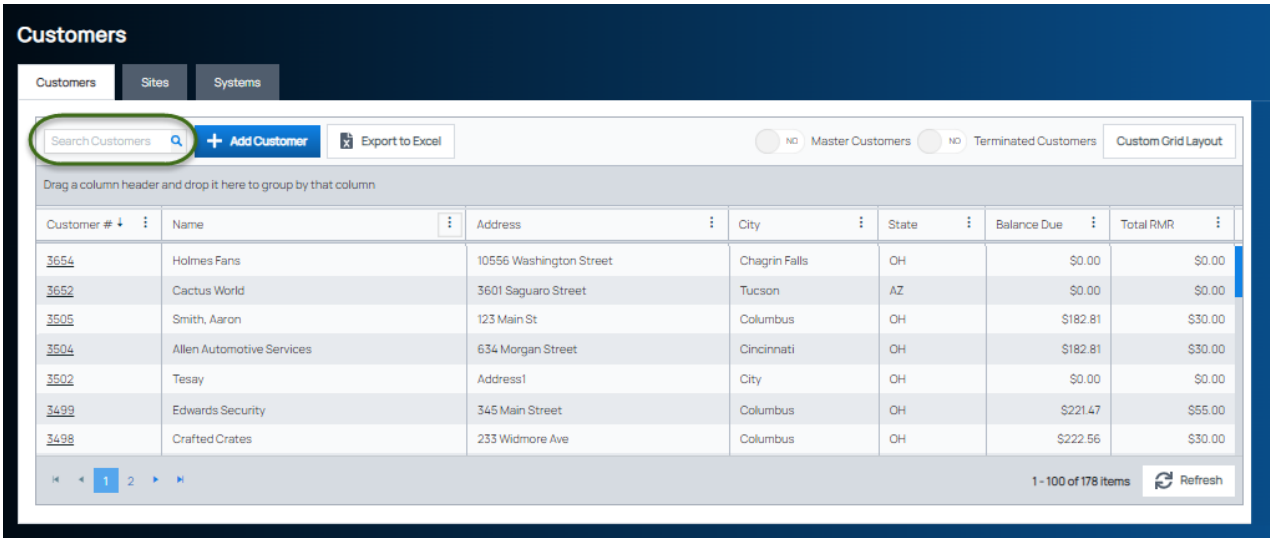
You can delete a document if have have been granted the appropriate user permissions.

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.

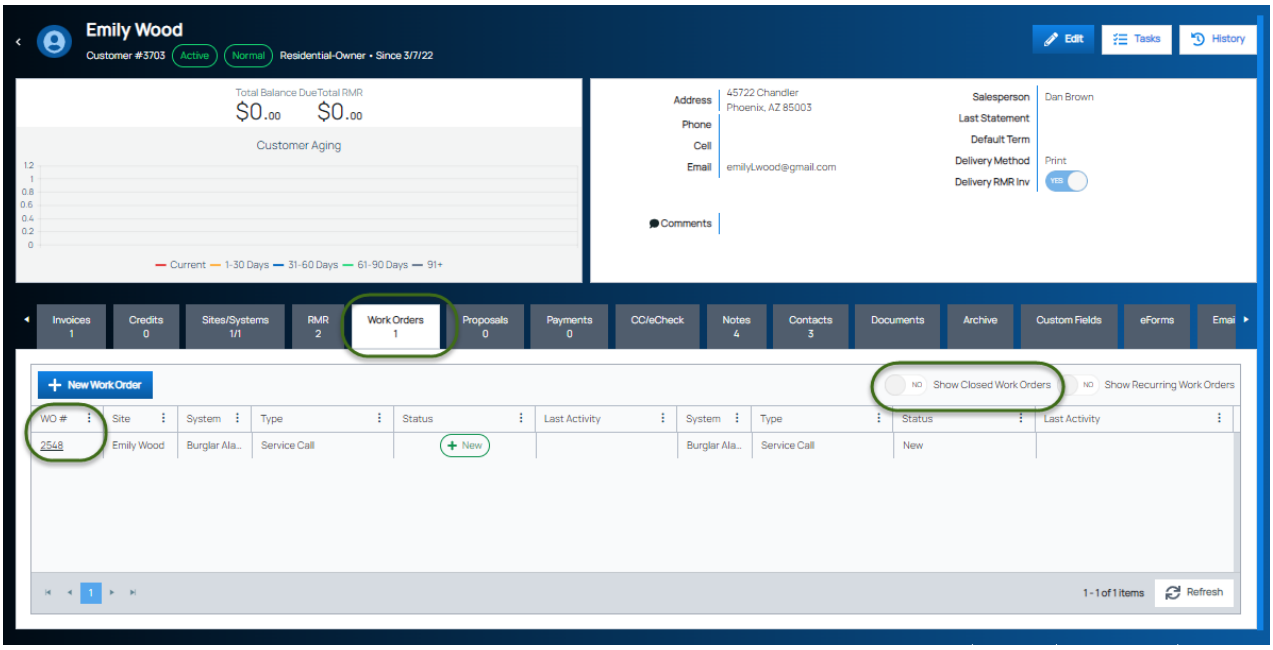
From the main menu, arrive at the Customers list with this path: CRM > Customers.

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 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.



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.