

How to Delete Documents from Jobs or Service Tickets

04/29/2024 9:57 am EDT

Sometimes documents that have been added to a service ticket or a job need to be removed. The steps in this document will go over how to do that.

Overview

Please follow the steps provided and if any issues arise, contact your Technical Support for help.

Job Document to be removed:

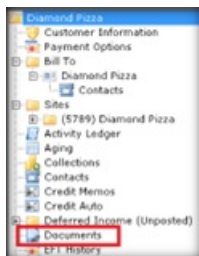
File Name	Description	Job Code	Type	Last Updated	User	For
ALL INFORMATION.pdf	Job Document to be deleted	1380	Job	1/2/2023	Finney	

Service Document to be removed:

File	Description	Type	Level	User	Uploaded
96A1383068874123A298428	Testing	Image	2 - Customer Restricted	WebSvcs	01/30/2022
3028420_060905.jpg	Testing delete	Pictures	2 - Customer Restricted	WebSvcs	05/01/2023

Steps:

1. Open customer account - Click on Documents in the tree



2. The list of documents available on the account will be displayed on the right

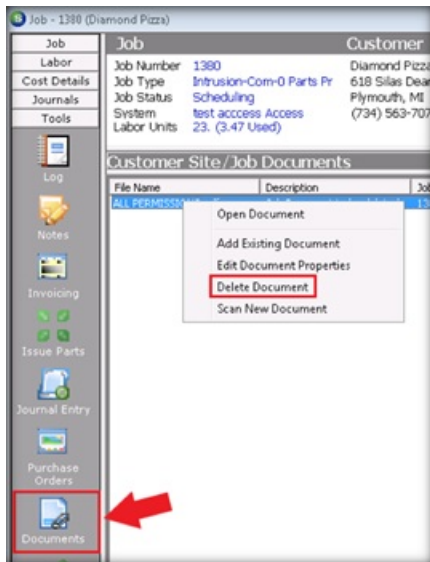
3. You can tell which document goes with either a Service Ticket or Job by looking in the For column

	File Name	Description	Type	Last Updated	User	For
Credit Memos						
Credit Auto						
Deferred Income (Unposted)						
Documents	9CA12030-6087-4127-4299-62A8D3...	Testing	Image	9/30/2022 5:18:16 PM	web@vics	Ticket 9543
	25239426_000906.jpg	Testing delete	Pictures	5/12/2023 9:37:29 PM	web@vics	Ticket 9543
	ALL PERMISSIOKAS.pdf	Job Document to be deleted	PDF	5/2/2023 3:42:38 AM	ReneesS	JOB 1380 - Intrusion-Com-0 Parts Pr

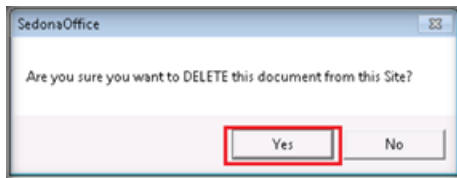
** In our example we are deleting the Picture for Ticket 9543 and PDF for Job 1380

4. To delete the Job Document

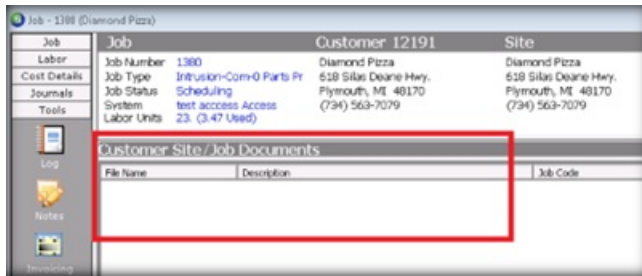
- Click on Jobs in the customer tree – Select the job to open
- Once the job opens – Click on Tools – Documents
- Highlight the document to remove – Right Click – Select Delete Document



- Click on Yes Button when asked if you want to delete

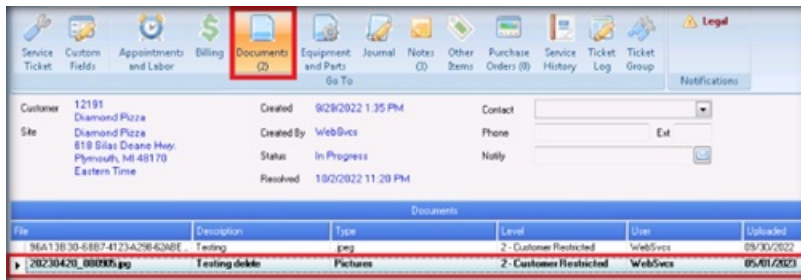


- Once deleted the document will no longer be shown in the job or on the customer account under the documents

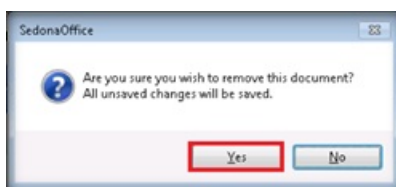


5. To Delete the Service Ticket Document

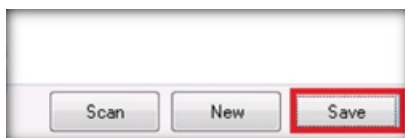
- Double-click on the Service Ticket that the document needs to be deleted
- Once opened - Click on Documents
- Highlight the document to delete



- Press the Delete Button on the Keyboard
- Click on the Yes Button to delete the document



- Click the Save button in the Service Ticket to save the changes



- The document should no longer be shown in the document list in the Service Ticket or in the documents area in the customer tree

6. Now open the Customer Documents in the tree and the documents that were deleted will no longer be shown

File Name	Description	Type	Last Updated	User	For
96A13030-6887-4123-A290...	Testing	.jpeg	9/30/2022 5:18:16 PM	WebDvcs	Ticket 9543