

Customer Explorer Documents-Delete

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If the User has General Document Delete permissions, the User will be able to permanently remove an attached document. Follow the steps below to delete an existing documents located in the Documents list of the Customer Explorer.

1. To Delete an existing Document highlight the Documents option from the Customer tree. In the Active Pane highlight the document to be deleted; right-click and select the Delete Document option.
2. The User will be presented with a confirmation message for the document deletion. Make certain the correct document was highlighted before clicking the Yes button on the confirmation message box. **This is a permanent deletion of the Document from the Customer Explorer.**

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