Add Documents to a Work Order

Last Modified on 03/04/2024 4:47 pm EST

To add documents to a work order, open the work order from the customer record or Accounts Receivable > Work Orders.

Once the work order is displayed, click on the Documents tab, and then click the Add Document button.

	Appointments Items & Deposits Pa	rts Part Kits RMR Billing 1 0 0	Change Orders Notes 0 0	Site Parts Site Notes 4 0	Zones Purchase Orders 0 0	Site Work Order History 18	Documents 0	General Ledger 1
	+ Add Document						NO Sh	ow deleted documents
	File Name	: Туре	:	Access Level	: Mo	dified Date :		
No records available.								
								_
	H H F F						0 - 0 of 0 ite	ms 🕃 Refresh

Add Document				×
Select file •	Select files		Drop files here to select	
			*Max file size 150MB	
Document Type			•	
Access Level			•	
	_			
	Save	Cancel		

There are two methods for uploading a document:

- Click the Select Files button; the Windows File Explorer opens for you to select one or multiple documents from the same folder.
- With the Windows File Explorer open to the location of the document(s), drag and drop the file(s) into the gray box to the right of the Select Files button. You can select multiple documents at the same time.

Once uploaded, the documents appear in the grid area.