

Edit Work Order Documents

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To edit a Work Order Document, open the work order from the customer record or from Accounts Receivable > Work Orders.

Once the work order is displayed, click on the Documents tab. Locate the document to be edited, and double-click on the document row.

The screenshot displays the 'Work Order 2617' interface. At the top, there are navigation buttons for 'Edit', 'Tasks', 'History', and 'Deliver/Print...'. Below this, a summary bar shows 'Wood, Emily - 3719', 'Emily Wood', and 'Burglar Alarm - 9173-01'. A map shows the location at 45722 Chandler Plymouth, MI 48170. A summary table provides details:

Type	Intrusion Installation-Residential	Salesperson	Dan Brown
Requested By	Emily Wood	Sales Package	-
Phone	7342584646	Service Level	SVC T&M RES
Email	emilylwood@gmail.com	Base	85
PO Number	-	Increment	15
Proposal	-	Labor	75
Work Order Date	April 23, 2022	Bill After	30
Next Appointment	-	Warranty Labor	Labor - 1 Year
Technician	-	Warranty Parts	Parts - 1 Year
		Description	-

Below the summary table is a navigation bar with tabs: Appointments, Items (1), Parts (0), RMR (0), Billing, Notes, System Parts, System Notes, Zones, Purchase Orders (0), Site Work Order History, Documents (selected), General Ledger, Part Ledger, and Custom Fields. The 'Documents' tab is active, showing a table with one document:

File Name	Type	Security	Modified Date	
Floor plan.pdf	Site Floor Plan	Customer	Apr 23, 2022, 3:31:29 PM	Replace Download Delete

At the bottom of the document list, there is a '0 - 0 of 0 items' indicator and a 'Refresh' button.

The edit form will be displayed. Only two items may be edited: the File Name and the Document Type. Make the necessary changes, and then click on the Save button when finished.

The screenshot shows the 'Edit Floor plan.pdf' form. It has a blue header with the title and a close button. The form contains two input fields: 'File Name' with the value 'Floor plan.pdf' and 'Document Type' with a dropdown menu showing 'Site Floor Plan'. At the bottom, there are two buttons: 'Save' (green) and 'Cancel' (white).