

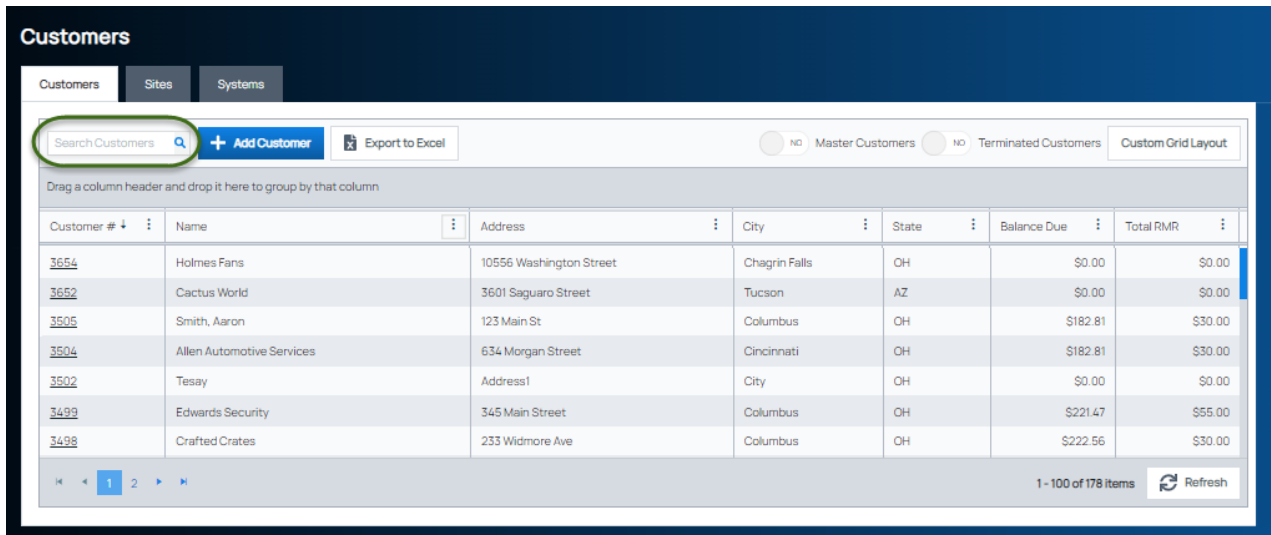
Add a Work Order Document

Last Modified on 12/16/2024 2:57 pm EST

To add a Work Order Document, you must first access the customer record.

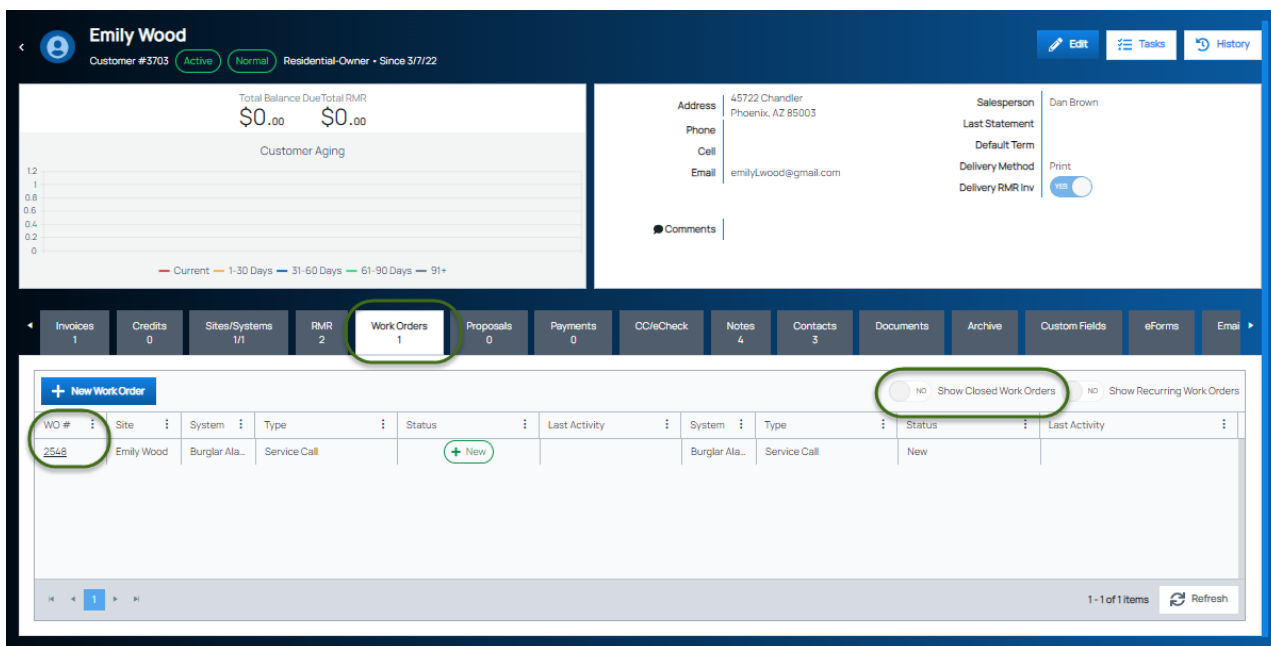
From the main menu, arrive at the Customers list with this path: CRM > Customers.

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 will be displayed. In the WO# column, click on the hyperlink of the Work Order for which you want to add a Document.

If the Work Order has been closed, click the Show Closed Work Orders button to locate the work order.



The Work Order record opens. Click on the Documents tab. There are two methods for uploading a document:

- Click on 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.

The screenshot shows the 'Work Order 2548' interface. At the top, there are navigation buttons for 'Edit', 'History', 'Tasks', and 'Deliver/Print'. Below this, the work order details include 'Wood, Emily - 3703', 'Emily Wood', and 'Burglar Alarm - 3703-01'. A financial summary shows Service Fee at \$85.00, Labor at \$0.00, Est Tax at \$0.00, and Total at \$0.00. A map displays the location at 45722 Chandler, Phoenix, AZ 85003. To the right, a metadata table lists details such as Type (Service Call), Salesperson (Dan Brown), and Work Order Date (March 20, 2022). A navigation bar at the bottom includes tabs for 'Documents', 'General Ledger', and 'Part'. The 'Documents' tab is highlighted with a green circle, and a 'Select files...' button is also circled in green.

Once uploaded, the documents appear in the grid area.

The screenshot shows the 'Emily Wood' customer profile interface. At the top, there are navigation buttons for 'Edit', 'Tasks', and 'History'. The profile includes 'Customer #3703', 'Active' and 'Normal' status indicators, and 'Residential-Owner - Since 3/7/22'. Financial information shows Total Balance Due and Total RMR both at \$0.00. A 'Customer Aging' chart is visible on the left. To the right, contact information and a metadata table are shown. A navigation bar at the bottom includes tabs for 'Documents', 'Archive', 'Custom Fields', 'eForms', and 'Email'. The 'Documents' tab is highlighted with a green circle, and a grid area below it contains one document: 'Customer Document.pdf'. This document entry is also circled in green, showing its security level as 'Customer' and its modified date as 'Mar 20, 2022, 11:40:57 PM'. Action buttons for 'Replace', 'Download', and a trash icon are visible next to the document entry.