Add a Work Order Document

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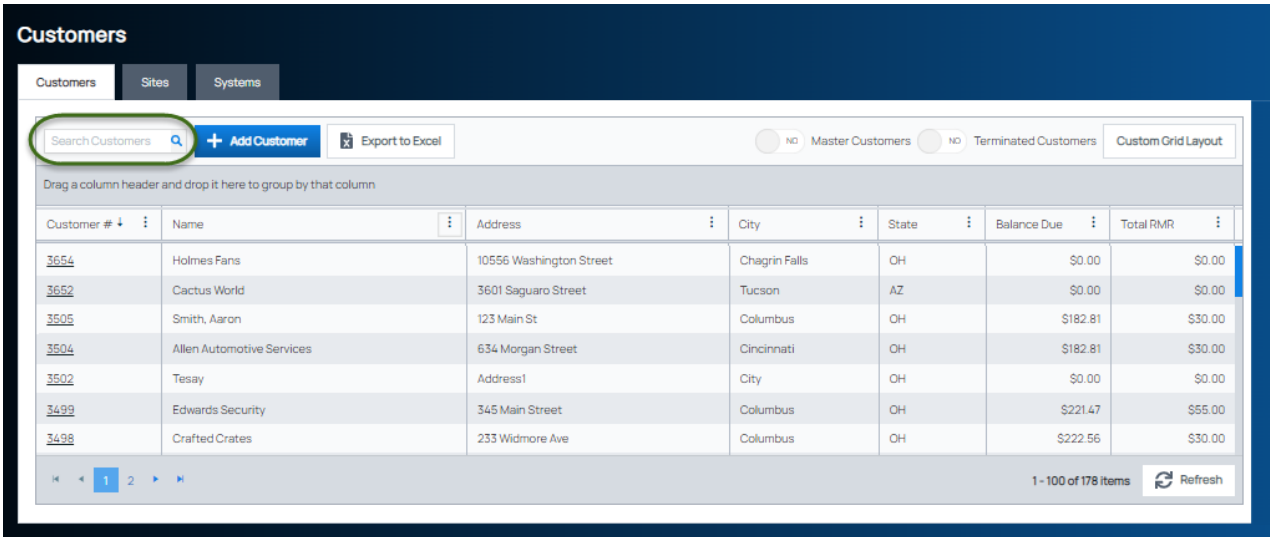
To add a Work Order Document, you must first access the customer record.

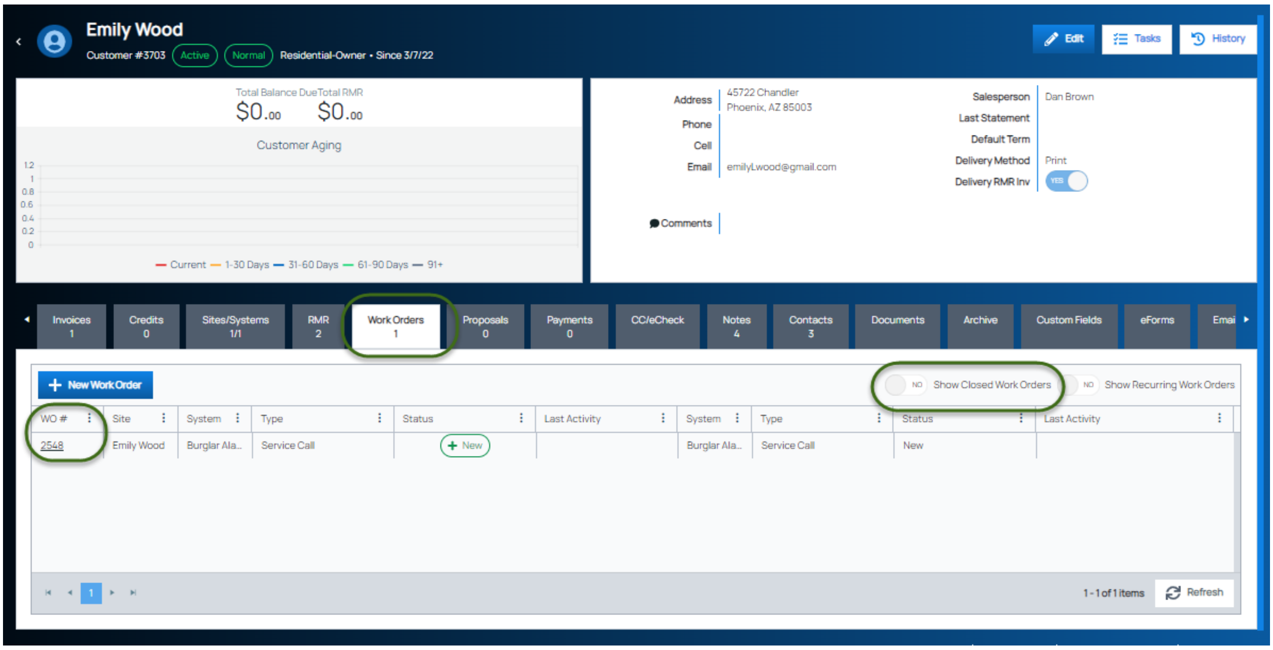
From the main menu, arrive at the Customers list with this path: CRM > Customers.

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.

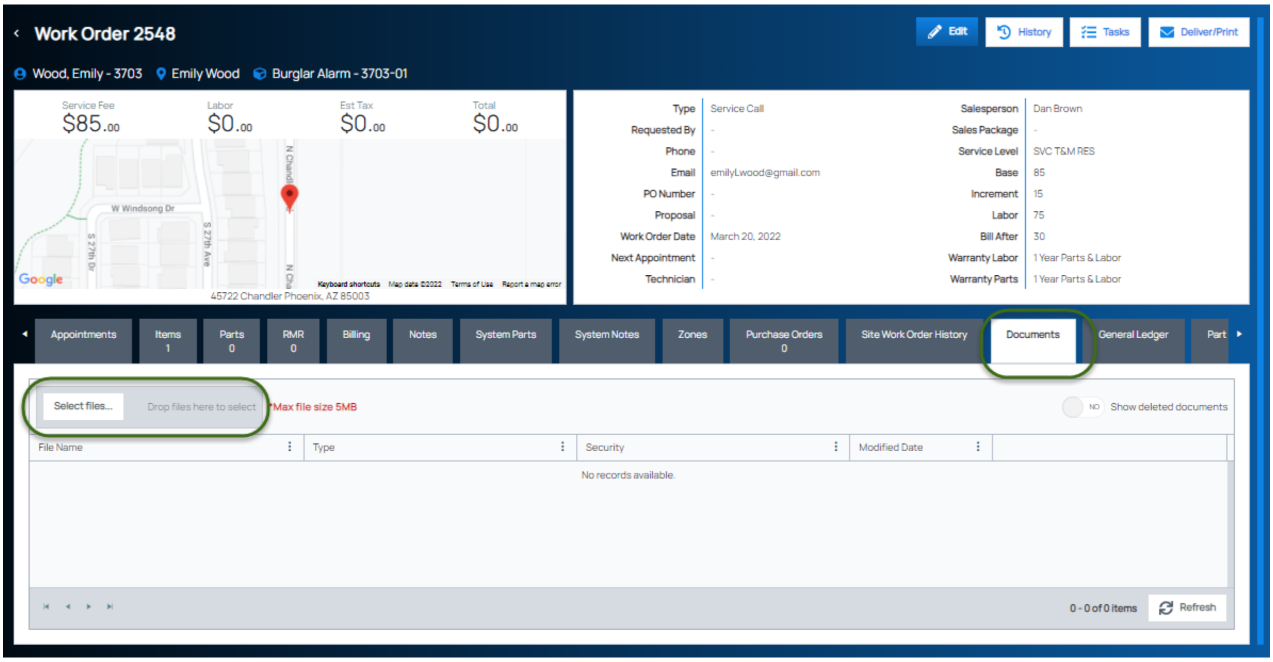
If the Work Order has been closed, click the Show Closed Work Orders button to locate the work order.



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.



Once uploaded, the documents appear in the grid area.