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.

ustomers Site	es Systems							
Search Customers	Q + Add Customer	X Export to Excel			NO Master Cus	tomers NO Te	erminated Customers	Custom Grid Layout
Drag a column header	r and drop it here to group by tha	t column						
Customer # 🕴 🚦	Name	1	Address	1	City :	State :	Balance Due	Total RMR
3654	Holmes Fans		10556 Washington Street		Chagrin Falls	он	\$0.00	\$0.00
3652	Cactus World		3601 Saguaro Street		Tucson	AZ	\$0.00	\$0.00
3505	Smith, Aaron		123 Main St		Columbus	ОН	\$182.81	\$30.00
3504	Allen Automotive Services		634 Morgan Street		Cincinnati	ОН	\$182.81	\$30.00
3502	Tesay		Address1		City	ОН	\$0.00	\$0.00
3499	Edwards Security		345 Main Street		Columbus	ОН	\$221.47	\$55.00
3498	Crafted Crates		233 Widmore Ave		Columbus	ОН	\$222.56	\$30.00

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.

Customer #3703 Active Normal Residential-Owner - Since 3/7/22	<mark>∕ Edit</mark> ﷺ Tasks [™] History
Total Balance Due Total RMR \$0.00 \$0.00	Address 45722 Chandler Salesperson Dan Brown Phoenic, AZ 85003 Last Statement
Customer Aging	Coll Email emilyLwood@gmail.com DeliveryRMR Inv DeliveryRMR Inv
0 - Current - 1-30 Days - 31-60 Days - 61-90 Days - 91+	
Invoices Credits Sites/Systems RMR Work Orders Proposels Payment 1 0 1/1 2 0 0	ts CC/eCheck Notes Contacts Documents Archive Custom Fields eForms Emei ► 4 3
+ New Work Order	10 Show Closed Work Orders
WO# : Site : System : Type : Status : Last Acti	
Emily Wood Burglar Ala. Service Call (+ New)	Burglar Ala_ Service Call New
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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.

 Work Order 2548 Deliver/Print 🔁 Tasks 💟 Deliver/Print							
😌 Wood, Emily - 3703 🔮 Emily Wood 💿 Burglar Alarm - 3703-01							
Service Fee \$85.00	Labor \$0.00	Est Tax \$0.00	Total \$0.00	Type Requested By	Service Call	Salesperson Sales Package	Dan Brown
	N CP			Phone		Service Level	SVC T&M RES
	handl			Email PO Number	emilyLwood@gmail.com	Base	85
W Windson				PONUMBER		Increment	75
S 27th	S 27th			Work Order Date	March 20, 2022	Bill After	30
Google	Ave			Next Appointment Technician		Warranty Labor	1 Year Parts & Labor 1 Year Parts & Labor
Ooogie	45722 Chandler Pho	Keyboard shortcuts Map data enix, AZ 85003	©2022 Terms of Use Report a map error	Technician		warrancy Parcs	ritear Parts & Labor
 Appointments 	Items Parts RMF 1 0 0	R Billing No	otes System Parts	System Notes Zone	s Purchase Orders 0	Site Work Order History Doc	uments General Ledger Part 🕨
Select files Drop files here to select. Max file size 5MB							
File Name	1	Туре	1	Security	:	Modified Date	
				No records available.			
нчьн							0-0 of 0 items 🧭 Refresh

Once uploaded, the documents appear in the grid area.

٢	Emily Wood Oustomer #3703 (Active) (Normal) Residential-Owner - Since 3/7/22	✓ Edit #Ξ Tasks *① History
	Total Balance Due Total RMR \$0.00 \$0.00	Address 45722 Chandler Salesperson Dan Brown Phoenix, AZ 85003 Last Statement
1.2 1 0.8 0.6 0.4 0.2	Customer Aging	Coll emilyLwood⊜gmail.com Delivery Method Delivery RMR.Inv €
0.2	- Current - 1-30 Days - 31-60 Days - 61-90 Days - 91+	
4	Invoices Credits Sites/Systems RMR Work-Orders Proposals Payment 1 0 1/1 2 1 0 0	nts CC/eCheck Notes Contacts Documents Archive Oustom Fields eForms Email
	Select files Drop files here to select *Max file size 5MB	ND Show deleted documents
ſ	File Name : Type :	Security : Modified Date :
	Customer Document.pdf	Customer Mar 20, 2022, 11:40:57 PM Image: Customer and Customer a
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