

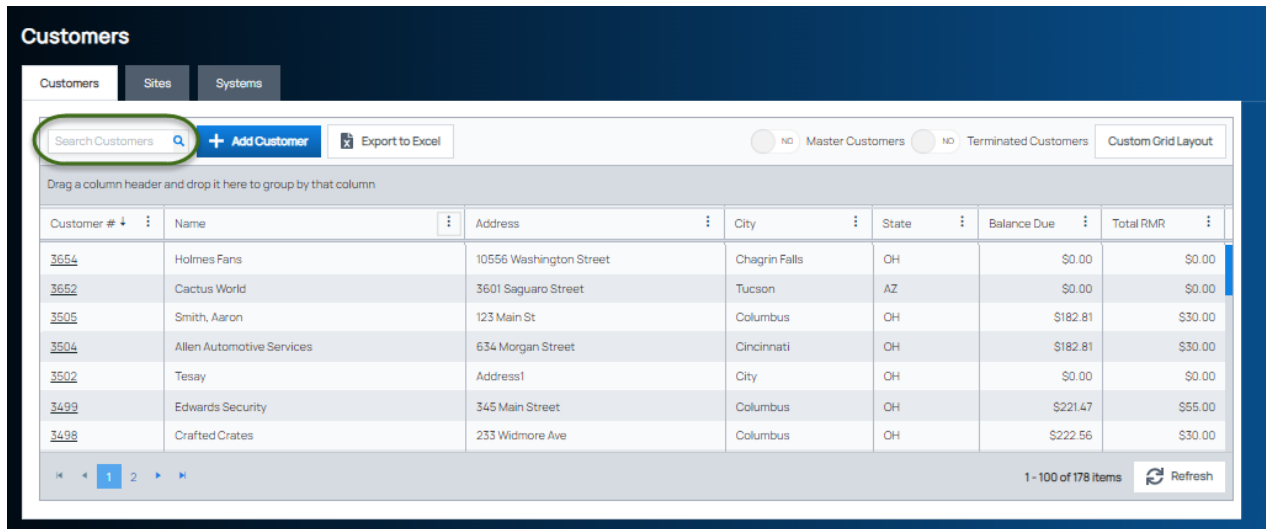
Add a Work Order Document

Last Modified on 04/28/2022 10:31 am EDT

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

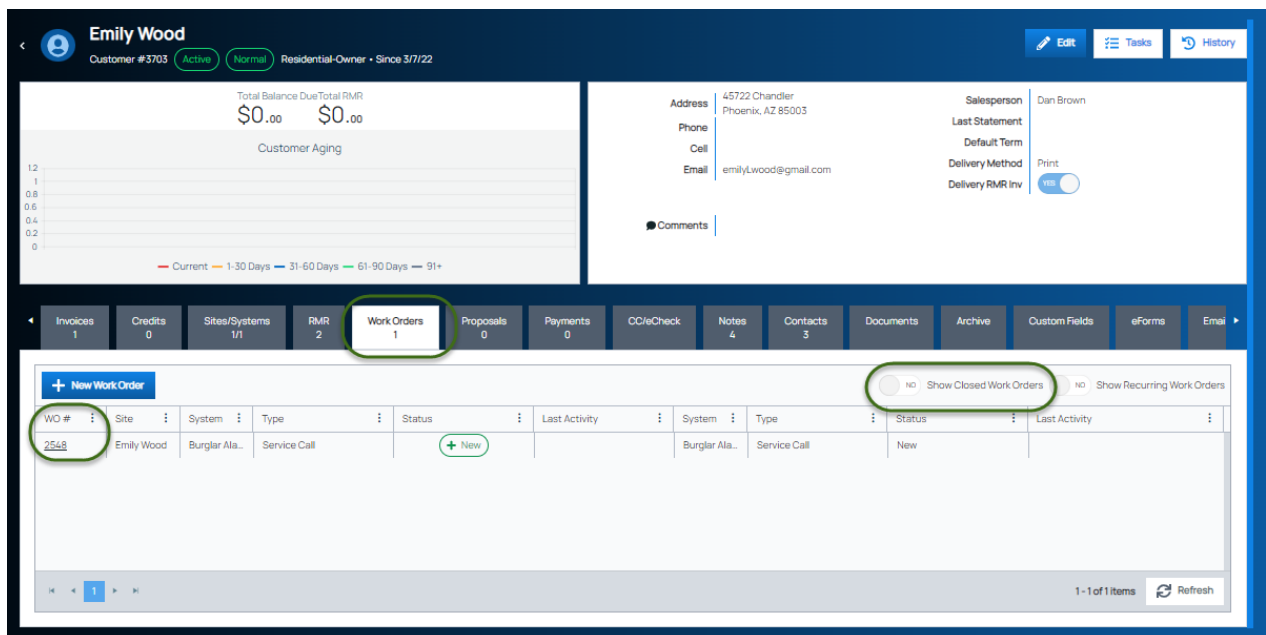
From the main menu, arrive at the Customers list with this path: Accounts Receivable> Customers.

The Customers list will be displayed. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.



The Customer record will be displayed. 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 on the Show Closed Work Orders button to locate the work order.



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

- Click on the Select Files button – the Windows file explorer will open 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 may 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 are displayed, including a map of the location at 45722 Chandler Phoenix, AZ 85003. A navigation bar at the bottom contains various tabs, with 'Documents' highlighted. Below the navigation bar, there is a 'Select files...' button and a 'Drop files here to select' area. A table with columns for 'File Name', 'Type', 'Security', and 'Modified Date' is shown, but it is currently empty with the message 'No records available'. A 'Refresh' button is located at the bottom right of the grid area.

Once uploaded, the documents will 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'. Below this, the customer details are displayed, including a 'Customer Aging' chart and a 'Comments' section. A navigation bar at the bottom contains various tabs, with 'Documents' highlighted. Below the navigation bar, there is a 'Select files...' button and a 'Drop files here to select' area. A table with columns for 'File Name', 'Type', 'Security', and 'Modified Date' is shown, with one file listed: 'Customer Document.pdf'. The file's security is 'Customer' and its modified date is 'Mar 20, 2022, 11:40:57 PM'. Action buttons for 'Replace', 'Download', and a trash icon are visible next to the file. A 'Refresh' button is located at the bottom right of the grid area.