## Replace a Work Order Document

Last Modified on 12/16/2024 3:05 pm EST

To replace 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.

| Customers   |                           |                 |   |   |               |         |               |                    |  |
|---|---------------------------|-----------------|---|---|---------------|---------|---------------|--------------------|--|
| Customers Sites Systems                                       |                           |                 |   |   |               |         |               |                    |  |
| Search Customers  | Q + Add Customer          | Export to Excel | NO Master Customers NO Terminated Customers |   |               |         |               | Custom Grid Layout |  |
| Drag a column header and drop it here to group by that column |                           |                 |   |   |               |         |               |                    |  |
| Customer # ↓ :  | Name                      | :               | Address                                     | ÷ | 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    | OH      | \$182.81      | \$30.00            |  |
| 3502  | Tesay                     |                 | Address1                                    |   | City          | OH      | \$0.00        | \$0.00             |  |
| 3499  | Edwards Security          |                 | 345 Main Street                             |   | Columbus      | ОН      | \$221.47      | \$55.00            |  |
| <u>3498</u>   | Crafted Crates            |                 | 233 Widmore Ave                             |   | Columbus      | OH      | \$222.56      | \$30.00            |  |
| H 4 1 2 > H 1-100 of 178 items 2 Refresh                      |                           |                 |   |   |               |         |               |                    |  |

The Customer record opens. Click on the Work Orders tab. A list of all open Work Orders is displayed. In the WO# column, click on the hyperlink of the Work Order for which you want to replace 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 37//22  |  | 🖋 Edit 🚝 Tasks 🕥 History                                  |
|--|--|---|
| Total Balanca Due Total RMR<br>\$0.00 \$0.00   | Address 45722 Chandler<br>Phoenix, AZ 85003                    | Salesperson Dan Brown<br>Last Statement                   |
| Customer Aging   | Ceil<br>Email emilyLwood@gmail.com                             | Default Term<br>Delivery Method Print<br>Delivery RMR Inv |
| Current — 1-30 Days — 31-60 Days — 61-90 Days — 91+ Invoices Credits Sites/Systems RMR Work Orders Proposals Payment | tta CC/kc/heck Notes Contacts Documents                        | Archive Oustom Fields eForms Email                        |
| 1 0 1/1 2 1 0 0  | 4 3  | how Closed Work Orders                                    |
| WO # i Site i System i Type i Statua i Last Act<br>2559<br>Emily Wood Burglar Ala. Service Call (+ New)              | ivity i System i Type i Status<br>Burglar Ala Service Call New | East Activity I   |
|  |  |   |
| н 🔸 🚹 🗲 н  |  | 1-1of1items PRefresh                                      |

The Work Order record opens. Click on the Documents tab. Locate the document, and then click the **Replace** button.

The Windows file explorer opens. Locate and select the document to replace the existing document. The previous

document is deleted, and the selected document is listed in the grid area.

| <   | Work Order 2548 🏾 🖓 History 🚝 Tasks 🗷 Deliver/Print         |                        |  |                                       |                           |                           |                              |                              |  |  |  |  |
|---|---|------------------------|--|---------------------------------------|---------------------------|---------------------------|------------------------------|------------------------------|--|--|--|--|
| 0   | 😌 Wood, Emily - 3703 🔮 Emily Wood 📦 Burglar Alarm - 3703-01 |                        |  |                                       |                           |                           |                              |                              |  |  |  |  |
|   | Service Fee   | SO.00                  | Est Tax  | SO.00                                 | Type<br>Requested By      | Service Call              | Salesperson<br>Sales Package | Dan Brown                    |  |  |  |  |
| /   |   | NO                     |  |                                       | Phone                     |                           | Service Level                | SVC T&M RES                  |  |  |  |  |
|   |   | andi                   |  |                                       | Email<br>PO Number        | emilyLwood@gmail.com<br>- | Base                         | 85                           |  |  |  |  |
|   | W Windsong  | g Dr                   |  |                                       | Proposal                  | -                         | Labor                        | 75                           |  |  |  |  |
| 1   | S 27th D  | 7th Ave                |  |                                       | Next Appointment          |                           | Warranty Labor               | su<br>1 Year Parts & Labor   |  |  |  |  |
| G   | oogle   | 45722 Chandler Ph      | Keyboard shortcuts Map data<br>oenix, AZ 85003 | 02022 Terms of Use Report a map error | Technician -              |                           | Warranty Parts & Labor       |                              |  |  |  |  |
| ٩   | Appointments It   | tems Parts RM<br>1 0 0 | IR Billing N                                   | otes System Parts                     | System Notes Zone         | s Purchase Orders<br>0    | Site Work Order History      | uments General Ledger Part 🕨 |  |  |  |  |
| Select files Drop files here to select *Max file size 5MB |   |                        |  |                                       | ND Show deleted documents |                           |                              |                              |  |  |  |  |
|   | File Name   | :                      | Туре   | :                                     | Security                  | 1                         | Modified Date :              |                              |  |  |  |  |
|   | Work Order Document.pdf                                     |                        |  |                                       | Customer                  |                           | Mar 21, 2022, 12:06:19 AM    | Replace                      |  |  |  |  |
|   | H 4 Þ H   |                        |  |                                       |                           |                           |                              | 0-0of0items 2 Refresh        |  |  |  |  |