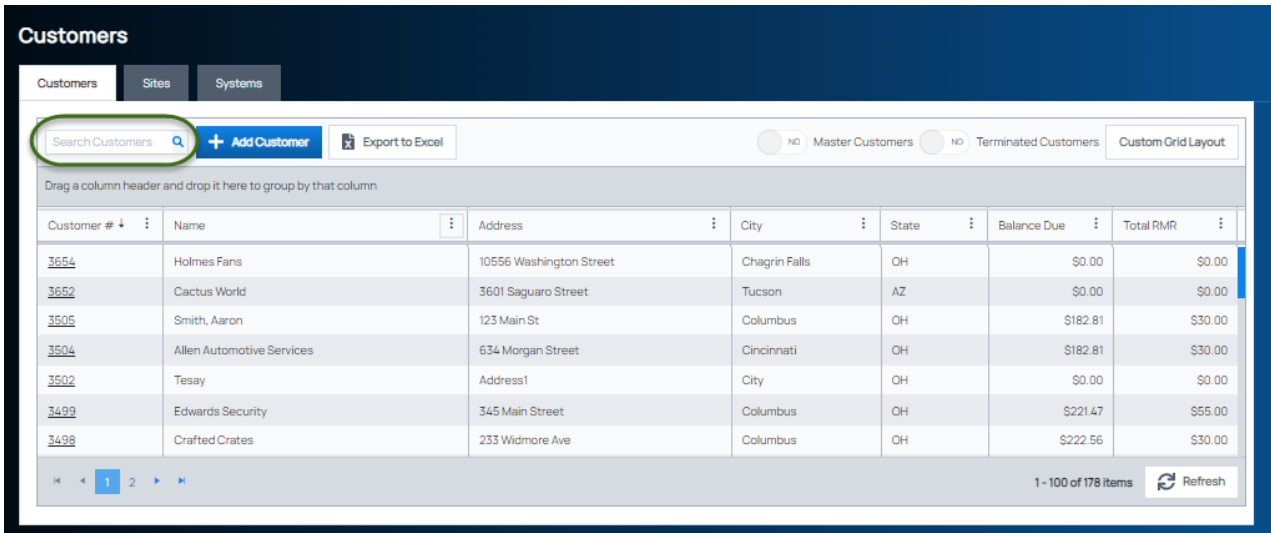


Replace a Work Order Document

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

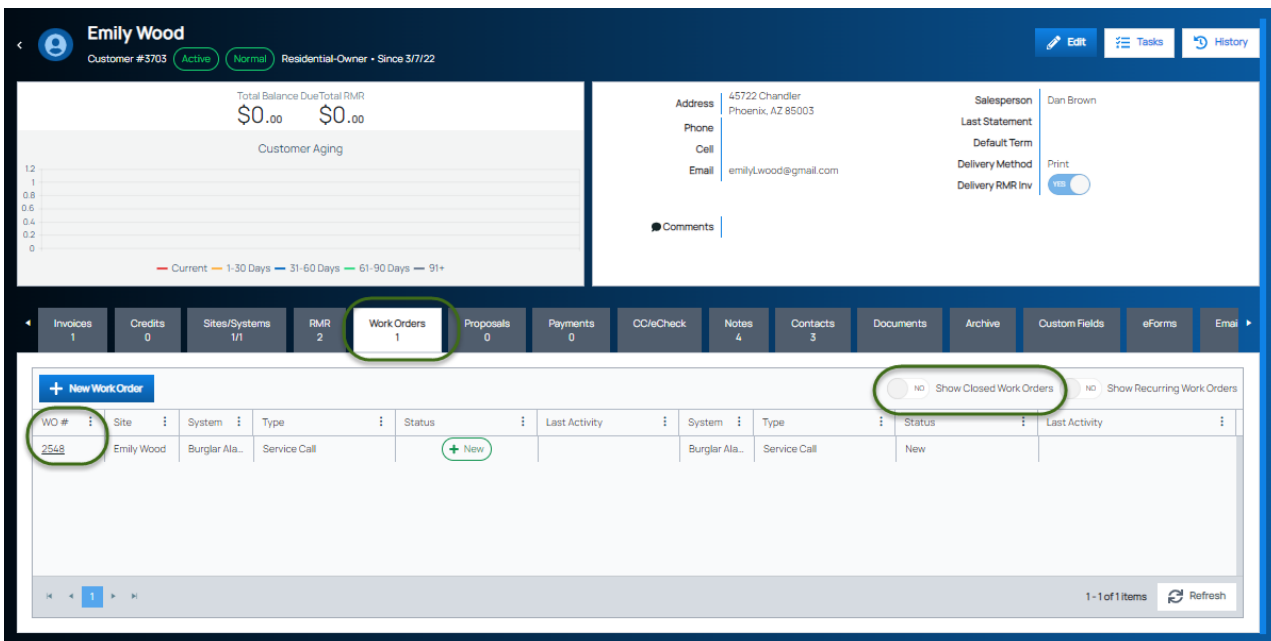
To replace a Work Order Document, you must first access the customer record. From the main menu, arrive at the Customers list with this path: CRM > Customers.

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.



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.



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

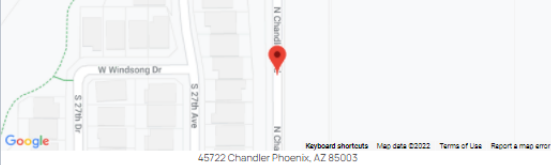
The Windows file explorer opens. Locate and select the document to replace the existing document. The previous

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

Work Order 2548 Edit History Tasks Deliver/Print

Wood, Emily - 3703 Emily Wood Burglar Alarm - 3703-01

Service Fee	Labor	Est Tax	Total
\$85.00	\$0.00	\$0.00	\$0.00



Type	Service Call	Salesperson	Dan Brown
Requested By	-	Sales Package	-
Phone	-	Service Level	SVC T&M RES
Email	emilylwood@gmail.com	Base	85
PO Number	-	Increment	15
Proposal	-	Labor	75
Work Order Date	March 20, 2022	Bill After	30
Next Appointment	-	Warranty Labor	1 Year Parts & Labor
Technician	-	Warranty Parts	1 Year Parts & Labor

Appointments | Items 1 | Parts 0 | RMR 0 | Billing | Notes | System Parts | System Notes | Zones | Purchase Orders 0 | Site Work Order History | **Documents** | General Ledger | Part

Select files... Drop files here to select *Max file size 5MB Show deleted documents

File Name	Type	Security	Modified Date	
Work Order Document.pdf		Customer	Mar 21, 2022, 12:06:19 AM	Replace Download Delete

0 - 0 of 0 items Refresh