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.

| Dustomers Site | es Systems | | | | | | | |
|---|---------------------------|-----------------|--|---|---------------|---------|-------------|--------------------|
| Search Customers | Add Customer | Export to Excel | No Master Customers No Terminated Customers Custom Grid La | | | | | Custom Grid Layout |
| Drag a column header and drop it here to group by that column | | | | | | | | |
| Customer # 🕴 🚦 | Name | i | 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 | 99 Edwards Security | | 345 Main Street | | Columbus OH | | \$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 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 Balance Due Total RMR \$0.00 \$0.00 | Address 45722 Chandler Phoenix, AZ 85003 | Salesperson Dan Brown Last Statement |
| Customer Aging | Cell Email emilyLwood@gmail.com | Default Term Delivery Method Print Delivery RMR Inv |
| Current — 1-30 Days — 31-60 Days — 61-90 Days — 91+ Invoices Credits Sites/Systems RMR Work Orders Proposals Paymer 1 | ts CC/eCheck Notes Contacts Documents | i Archive Custom Fields eForms Emei • |
| + New Work Order | | Show Closed Work Orders No Show Recurring Work Orders |
| WO # : Site : System : Type : Status : Last Act 2548 Emily Wood Burglar Ala. Service Call + New | ivity i System i Type i Statu Burglar Ala Service Call New | ······································ |
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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 | \$0.00 | 50.00 | Total \$0.00 | Type Requested By | Service Call | Salesperson Sales Package | Dan Brown | | | | | |
| / | | N Cha | | | Phone | | Service Level | SVC T&M RES | | | | | |
| | | andi | | | Email PO Number | emilyLwood@gmail.com - | Base | 85 | | | | | |
| | W Windsong | 01 | | | Proposal Work Order Date | - March 20. 2022 | Labor | 75 30 | | | | | |
| 1 | s 27th D | 27th Ave | | | Next Appointment | | Bill After Warranty Labor | 30 1 Year Parts & Labor | | | | | |
| Google Vepteed structures May data 20222 Terms of Use Reports may error Technician - Warranty Parts 1 Year Parts & Labor 1/9 Parts & Labor | | | | | | | | 1 Year Parts & Labor | | | | | |
| ٩ | Appointments It | tems Parts RM 1 0 0 | | otes System Parts | System Notes Zone | s Purchase Orders 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 | : | Modified Date | | | | | | |
| | Work Order Document.pdf | | | | Customer | | Mar 21, 2022, 12:06:19 AM | Replace | | | | | |
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