Download a Work Order Document

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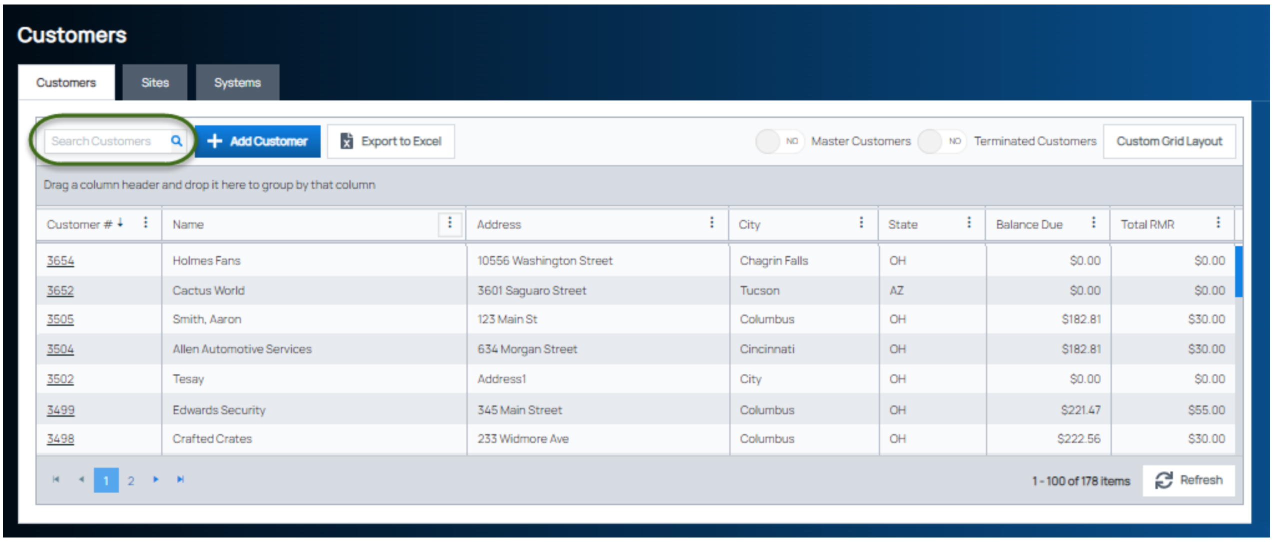
To open and view an attached document, download the file. The software creates a PDF file of the selected document. Once downloaded you can open the file for viewing.

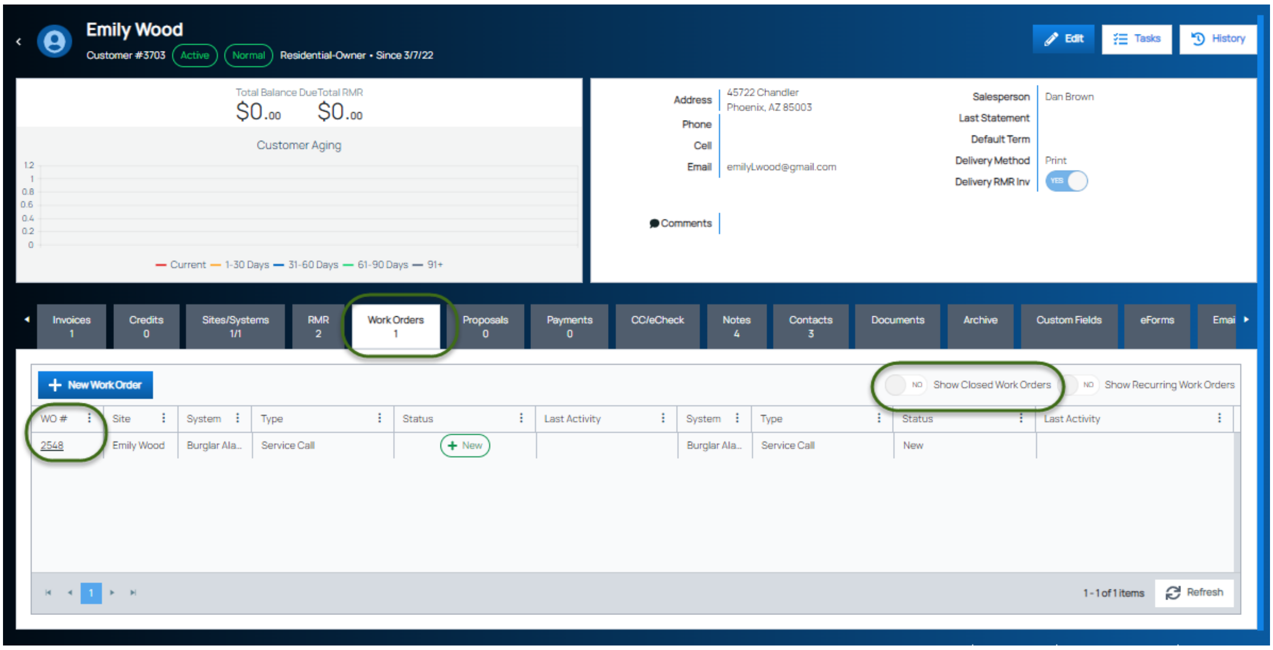
To download a Work Order Document, you must first access the customer record. From the main menu, arrive at the Customers list with this path: CRM > Customers.

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 download 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 on the Download button.

In a few seconds, the file will appear on your taskbar. Double-click on the file to open for viewing.