

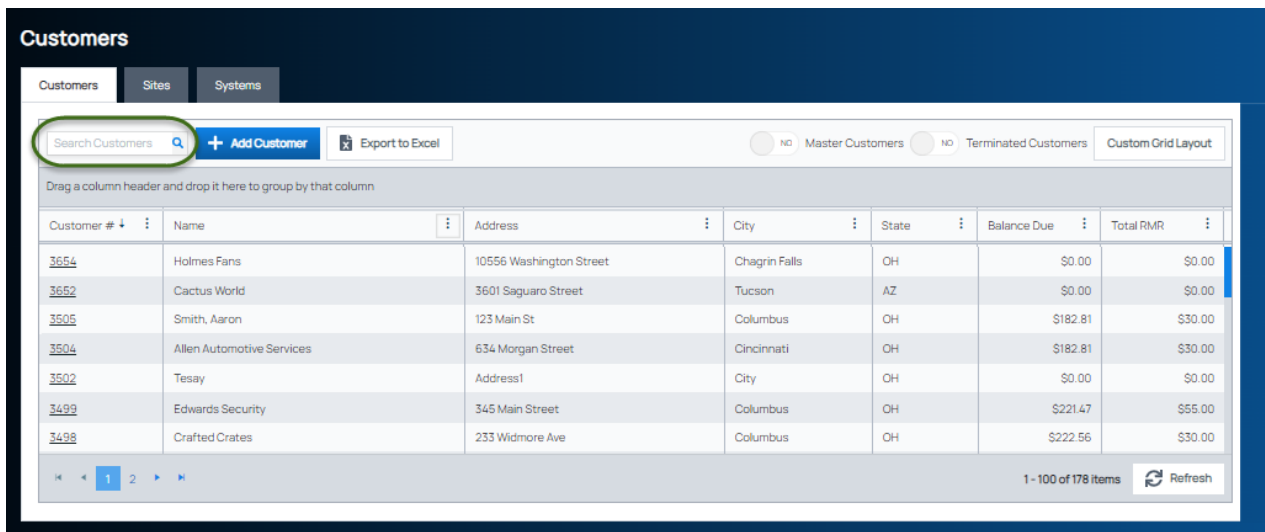
# Download a Work Order Document

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

To be able to open and view an attached document, you will need to download the file. The software creates a .pdf file of the selected document. Once downloaded you may open the .pdf file for viewing.

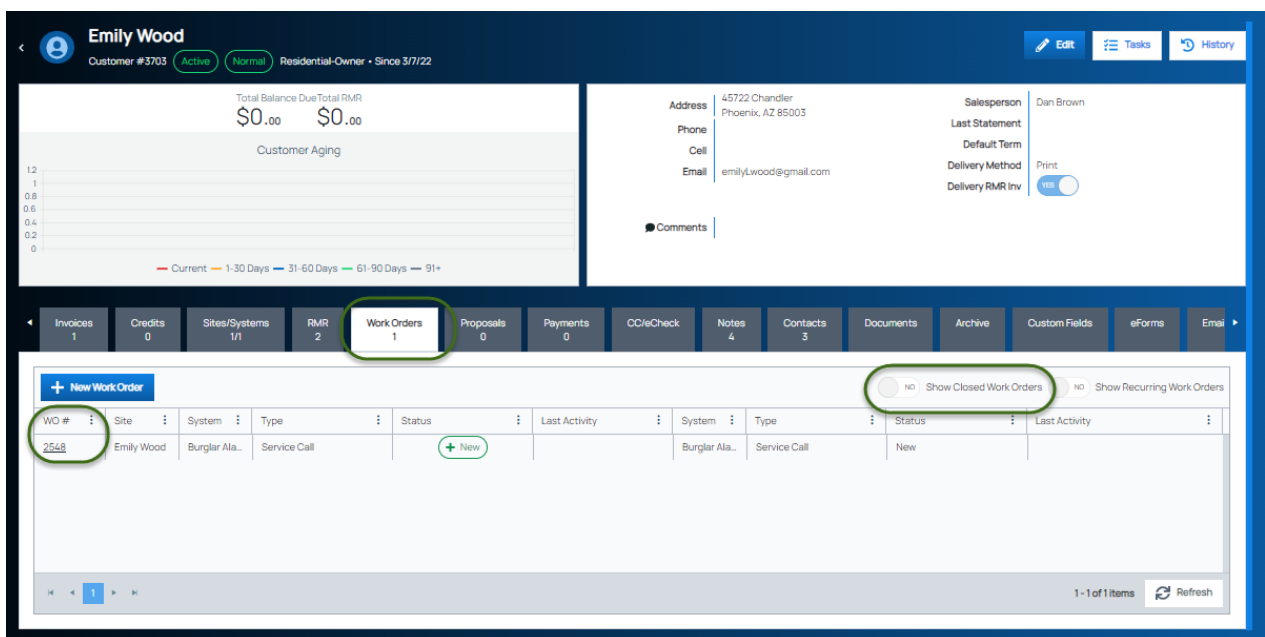
To download a Work Order Document, you must first access the customer record. From the main menu, arrive at the Customers list with this path: Accounts Receivable > Customers.

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 download 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. 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.

The screenshot displays a software interface for 'Work Order 2548'. The interface is divided into several sections:

- Left Sidebar:** Contains navigation options such as Home, Customers, Invoices, Payments, RMR, Work Orders (highlighted), Proposals, Calendar, GL, Reports, and Setup.
- Top Header:** Shows 'Accounts Receivable' and 'Work Order 2548' with buttons for Edit, History, Tasks, and Deliver/Print.
- Main Content Area:**
  - Financial Summary:** Service Fee: \$85.00, Labor: \$0.00, Est. Tax: \$0.00, Total: \$0.00.
  - Map:** Shows a location at 45722 Chandler Phoenix, AZ 85032.
  - Customer Information:** Wood, Emily - 3703, Emily Wood, Burglar Alarm - 3703-01.
  - Service Call Details:** Type: Service Call, Requested By: -, Phone: -, Email: emilylwood@gmail.com, PO Number: -, Proposal: -, Work Order Date: March 20, 2022, Next Appointment: -, Technician: -.
  - Salesperson Information:** Salesperson: Can Brown, Sales Package: -, Service Level: SVC T&M RES, Base: 85, Increment: 15, Labor: 75, Bill After: 30, Warranty Labor: 1 Year Parts & Labor, Warranty Parts: 1 Year Parts & Labor.
- Documents Section:** A table with columns for File Name, Type, Security, and Modified Date. It lists a file named 'Work Order Document.pdf' with a 'Download' button circled in green.

A green arrow points from the 'Download' button in the table to the file icon in the Windows taskbar at the bottom of the screen, which shows 'Work Order Docu...pdf'.