

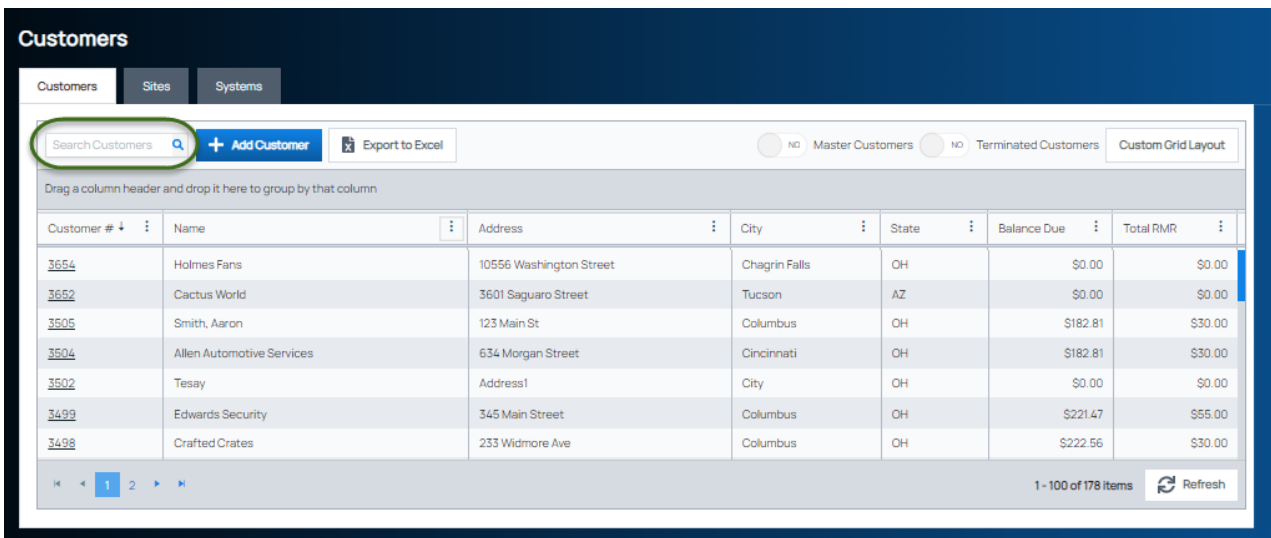
# Download a Work Order Document

Last Modified on 12/16/2024 3:02 pm EST

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.

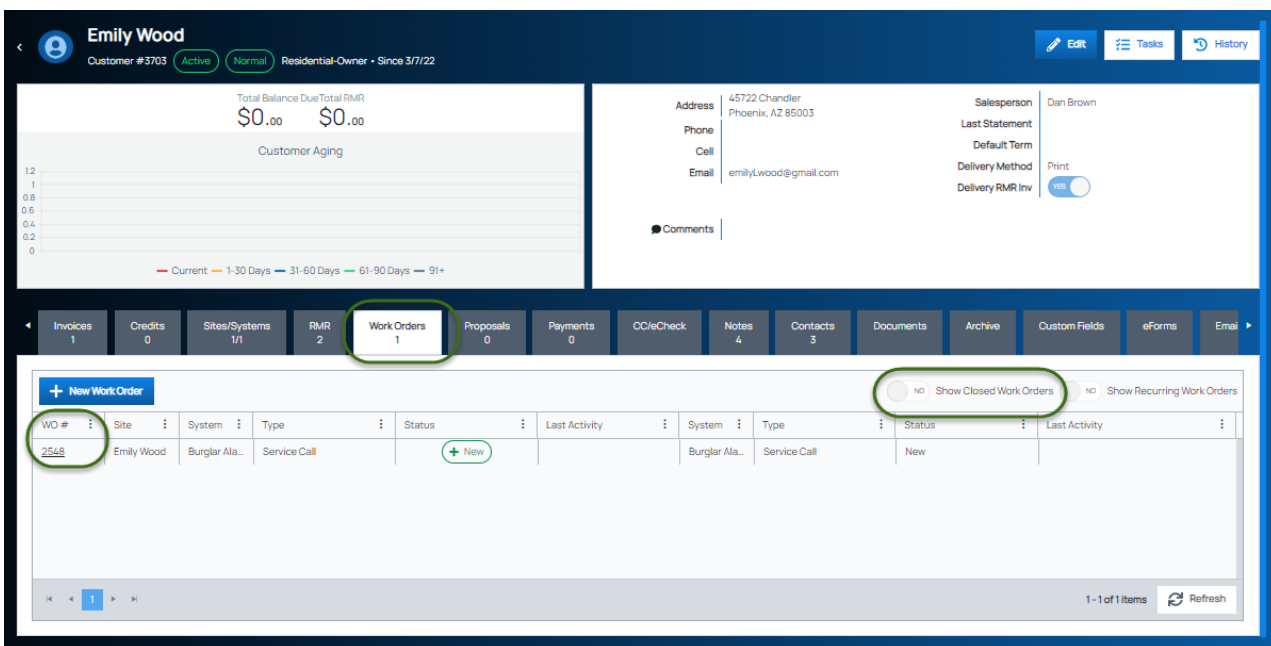
To download a Work Order Document, you must first access the customer record. From the main menu, arrive at the Customers list with this path: CRM > Customers.

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.

The screenshot displays a software interface for 'Work Order 2548'. The interface includes a sidebar with navigation options like 'Home', 'Customers', 'Invoices', 'Payments', 'RMR', 'Work Orders', 'Proposals', 'Calendar', 'GL', 'Reports', and 'Setup'. The main content area shows a summary of the work order, including a map of the location (45722 Chandler Phoenix, AZ 85035) and a table of financial details:

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

Below the map, there are tabs for 'Appointments', 'Items', 'Parts', 'RMR', 'Billing', 'Notes', 'System Parts', 'System Notes', 'Zones', 'Purchase Orders', 'Site Work Order History', 'Documents', 'General Ledger', and 'Part'. The 'Documents' tab is active, showing a table of documents:

File Name	Type	Security	Modified Date	Actions
Work Order Document.pdf		Customer	Mar 21, 2022, 12:05:19 AM	Replace Download

The 'Download' button in the actions column is circled in green. A green arrow points from this button to a taskbar icon labeled 'Work Order Docu...pdf'.