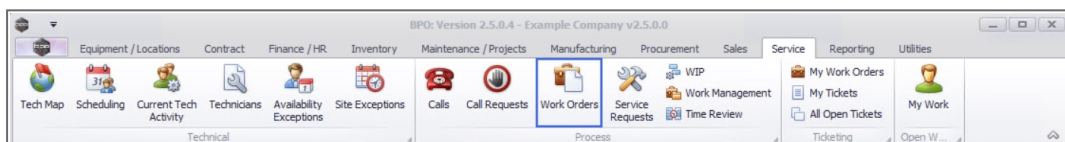


# SERVICE

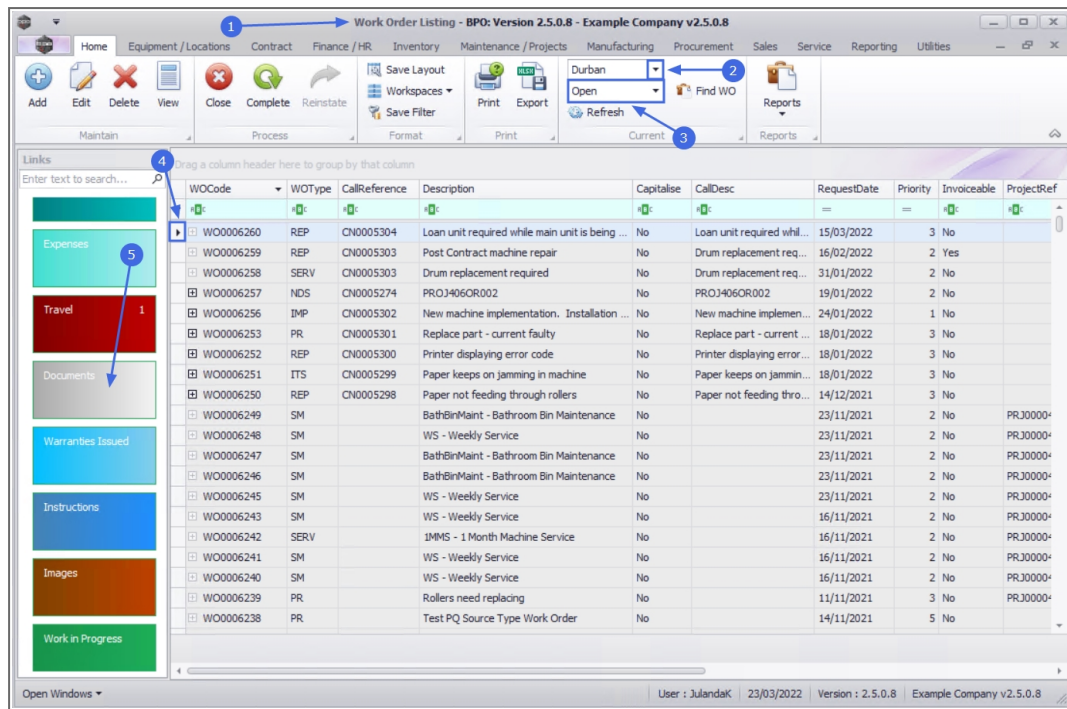
## WORK ORDERS – DOCUMENTS

The Documents tile allows you to link, view or delete digital documents to the work order. These documents need to be saved in a shared folder on the server.

**Ribbon Access:** *Service > Work Orders*



1. The **Work Order Listing** screen will be displayed.
2. Select the **Site** where the work order has been raised.
  - The example has **Durban** selected.
3. Select the **Status**.
  - The example has **Open** selected.
4. Click on the **row** of the **work order** you wish to link documents to.
5. Click on the **Documents** tile.



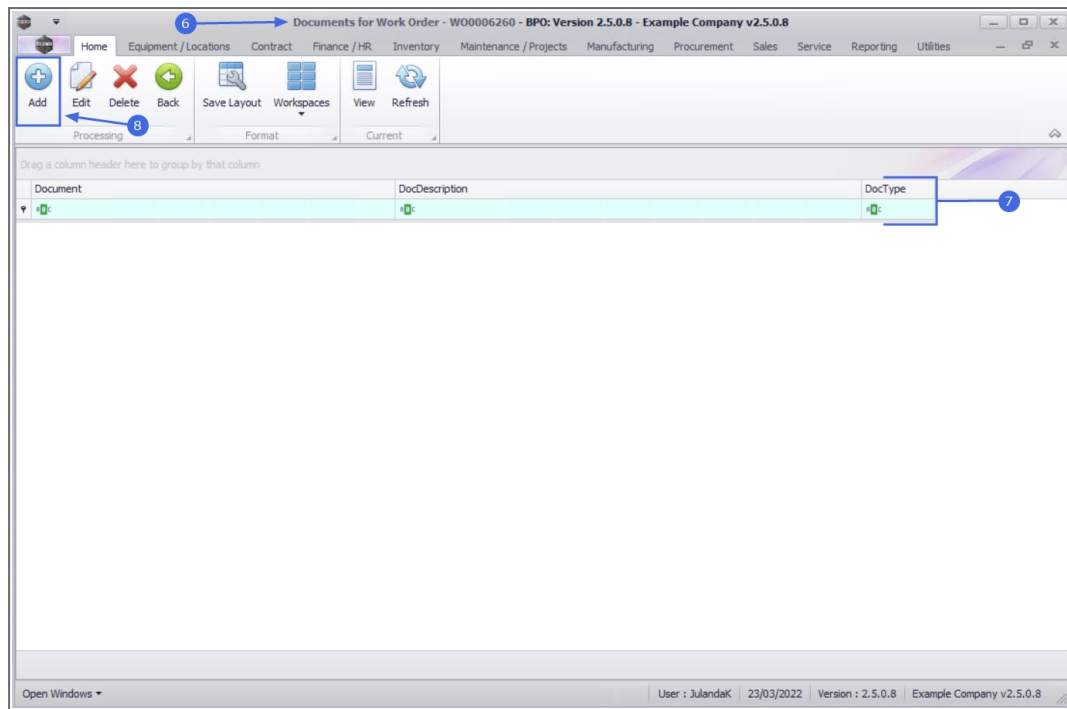
6. The ***Documents for Work Order - [work order code]*** screen will be displayed.
7. Any documents that have already been ***linked*** to the work order will display in the data grid.

## ADD NEW DOCUMENT

8. Click on **Add**.

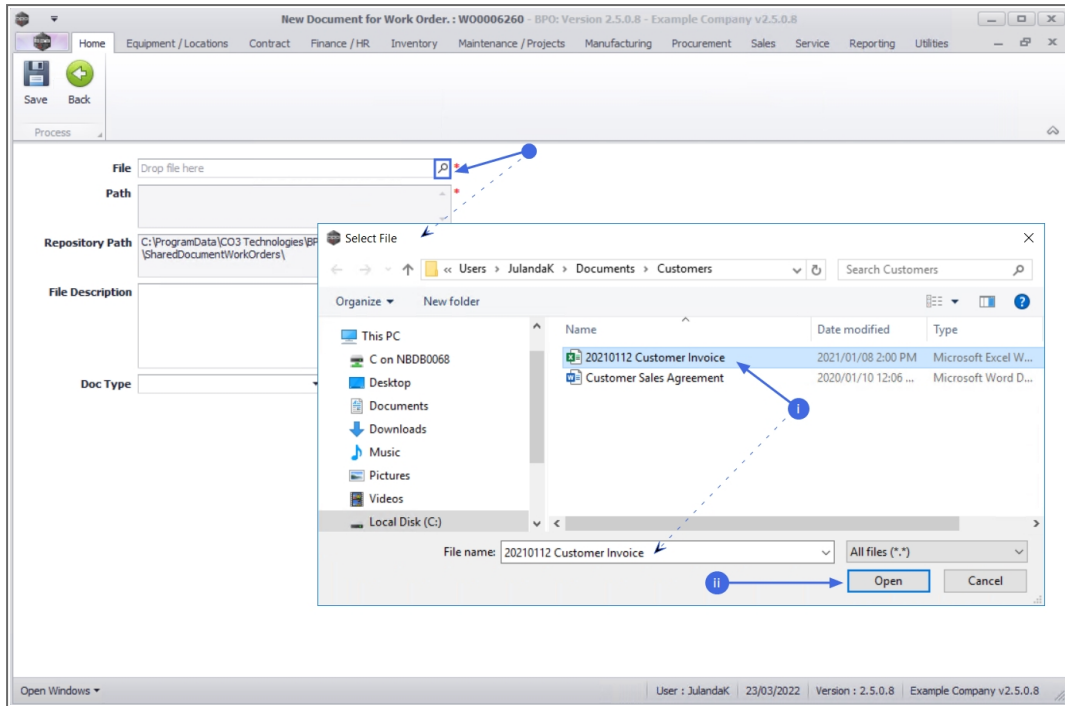


Short cut key: **Right click** to display the **Process** menu list. Click on **Add**.



9. The ***New Document for Work Order: [work order code]*** screen will be displayed.

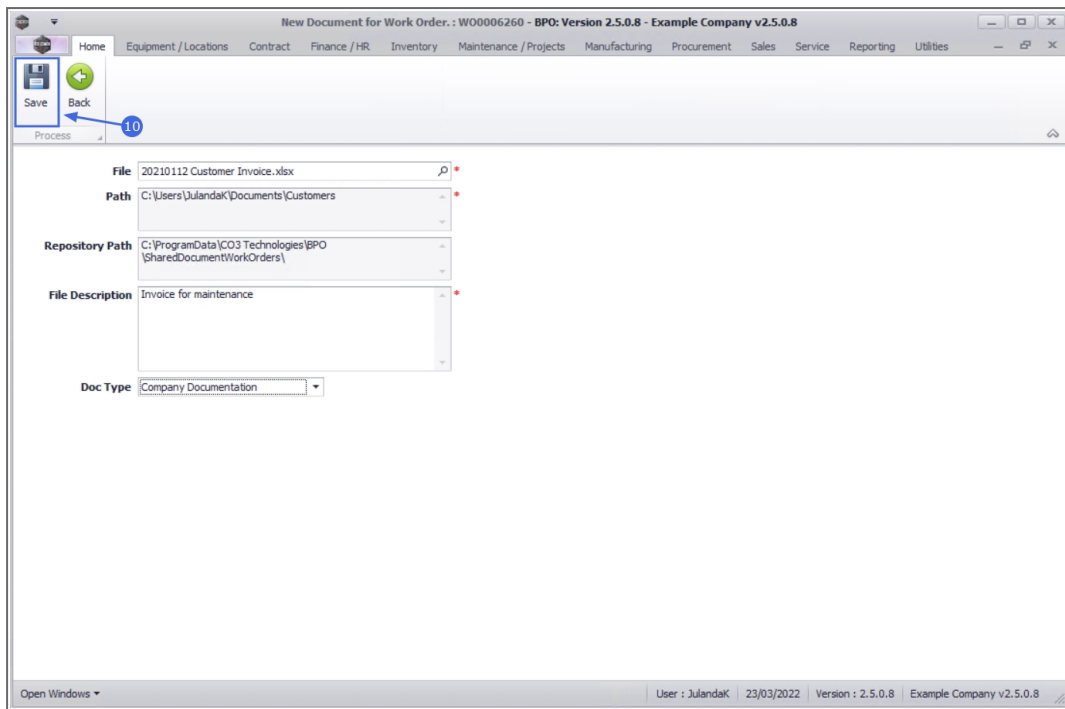
- **File:** Click on the ***search*** button to display the ***Select File*** screen.
  - i. Select the document that you wish to ***attach*** to the work order.
  - ii. Click on ***Open***.



- **Path:** The file path relevant to the document you have selected will display.
- **Repository Path:** The repository path is populated with the path configured in the Company Configuration.
- **File Description:** Click in the text box to type in a description for the document.
- **Doc Type:** Click on the down **arrow** to select the document type from the drop-down list.

## SAVE DOCUMENT LINK

10. Click on **Save** to update the document link.

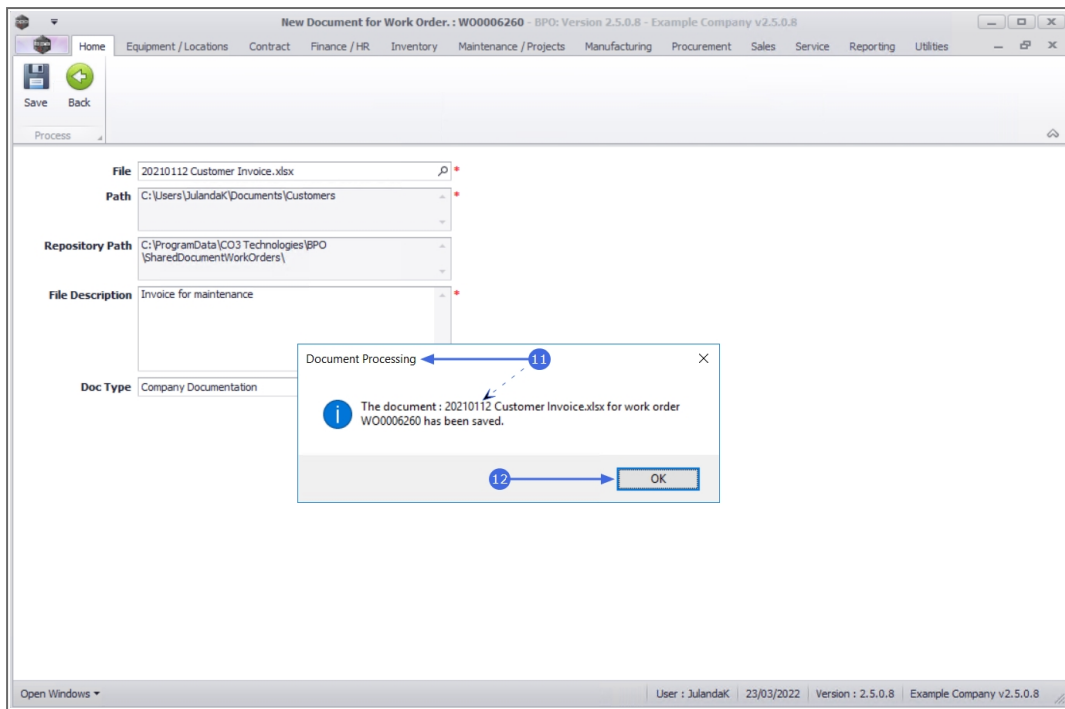


The screenshot shows the 'New Document for Work Order' form in the CO3 Technologies software. The form is titled 'New Document for Work Order.: W00006260 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8'. The form includes a 'Process' button, a 'Save' button (highlighted with a blue box and a blue arrow pointing to it with the number 10), and a 'Back' button. The form fields are:

- File:** 20210112 Customer Invoice.xlsx
- Path:** C:\Users\JulandaK\Documents\Customers
- Repository Path:** C:\ProgramData\CO3 Technologies\BPO\SharedDocument\WorkOrders\
- File Description:** Invoice for maintenance
- Doc Type:** Company Documentation

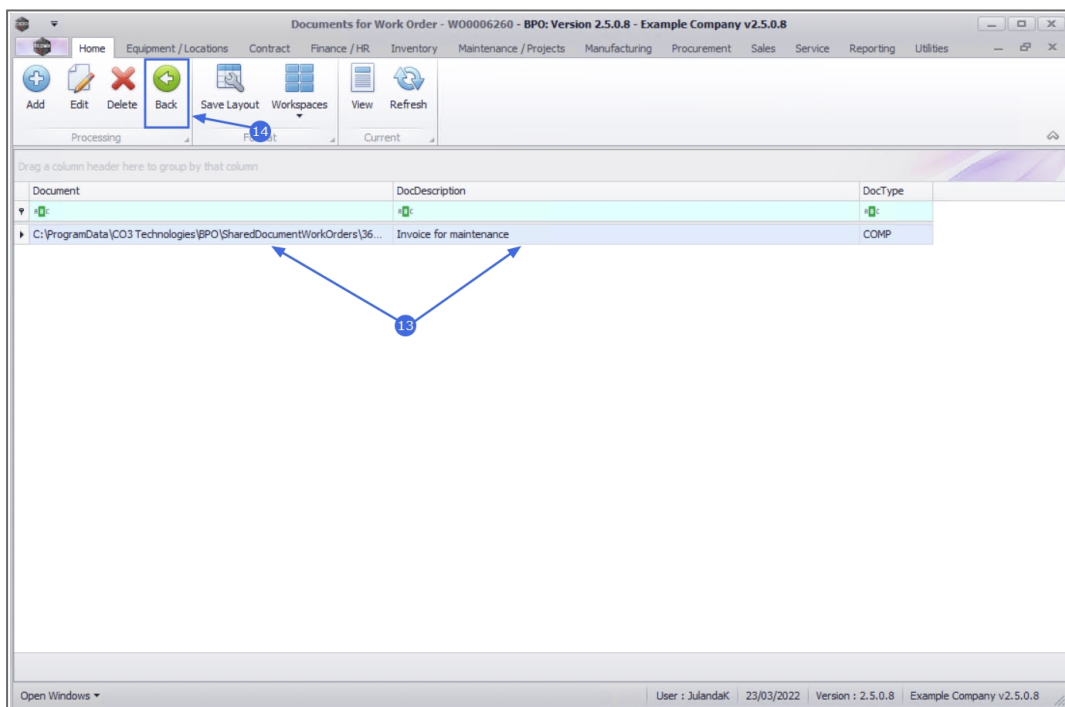
The bottom status bar shows: User : JulandaK | 23/03/2022 | Version : 2.5.0.8 | Example Company v2.5.0.8

11. When you receive the **Document Processing** message to confirm that;
  - **The document: [document name] for work order [work order code] has been saved.**
12. Click on **OK**.



13. You will return to the updated **Documents for Work Order** screen.

14. Click on **Back** to return to the **Work Order Listing** screen.



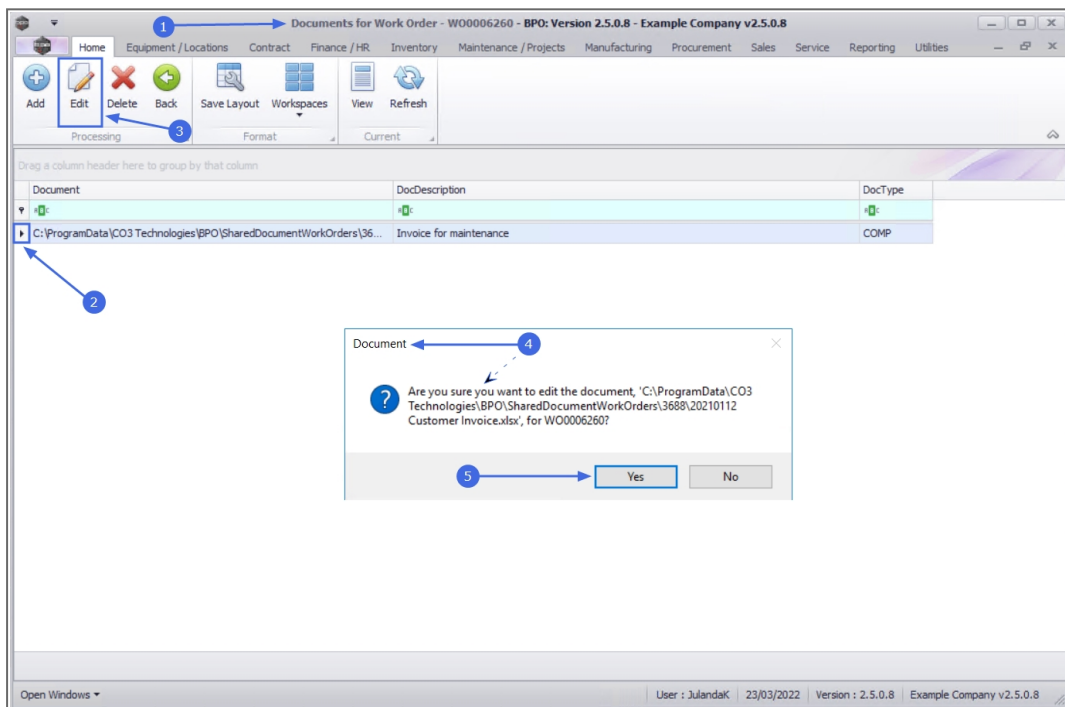
## EDIT DOCUMENT

1. From the **Documents for Work Order - [work order code]** screen,
2. Click on the **row** of the document you wish to edit.
3. Click on **Edit**.



Short cut key: **Right click** to display the **Process** menu list. Click on **Edit**.

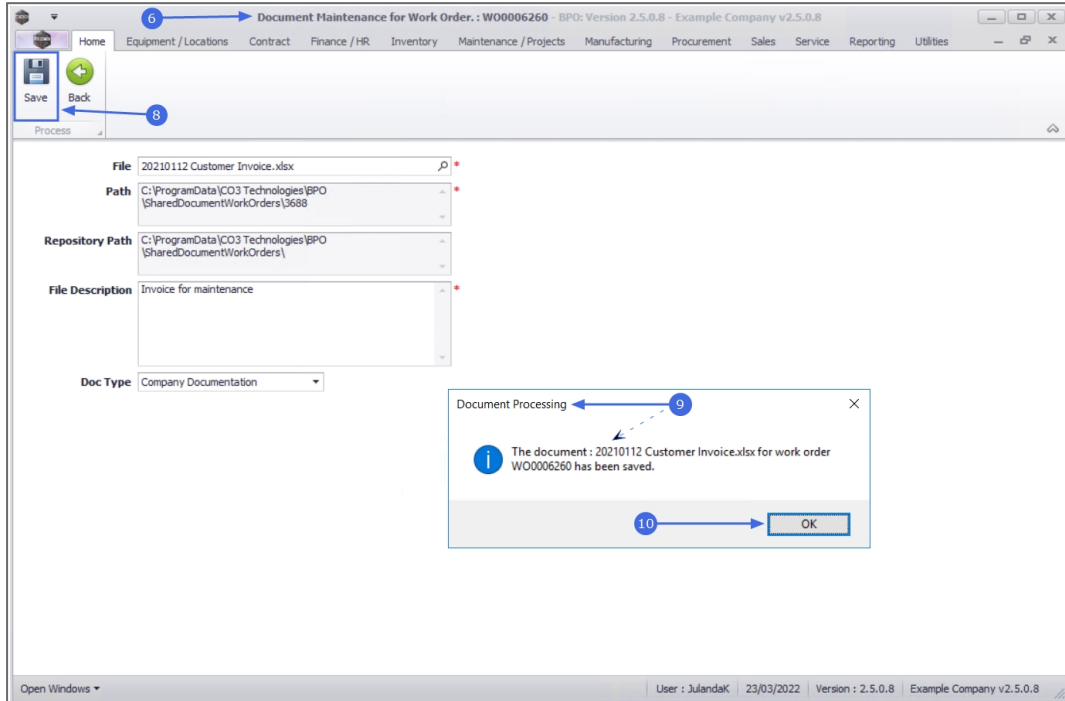
4. When you receive the **Document** message to confirm;
  - **Are you sure you want to edit the document, [file path and document name] for [work order code]?**
5. Click on **Yes**.



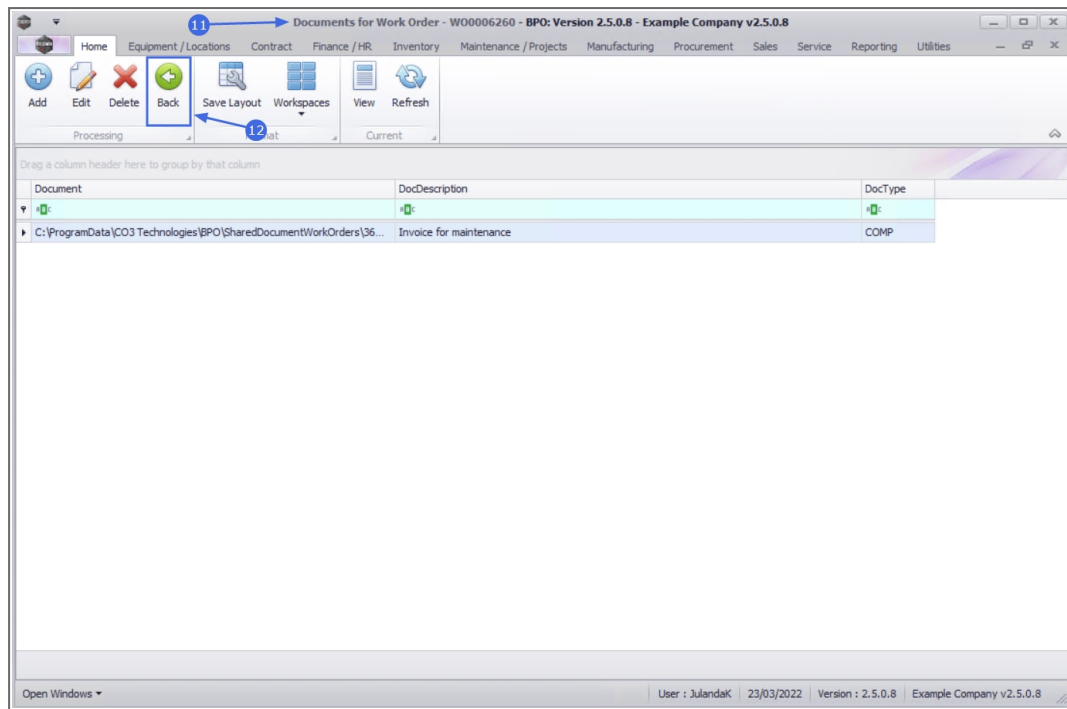
6. The **Document Maintenance for Work Order : [work order code]** screen will display.
7. Make the necessary changes to the document maintenance screen as required.
8. Click on **Save**.

9. When you receive the **Document Processing** message to confirm;
  - **The document : [document name] for work order [work order code] has been saved.**

10. Click on **OK**.



11. You will return to the updated **Documents for Work Order** screen.
12. Click on **Back** to return to the **Work Order Listing** screen.



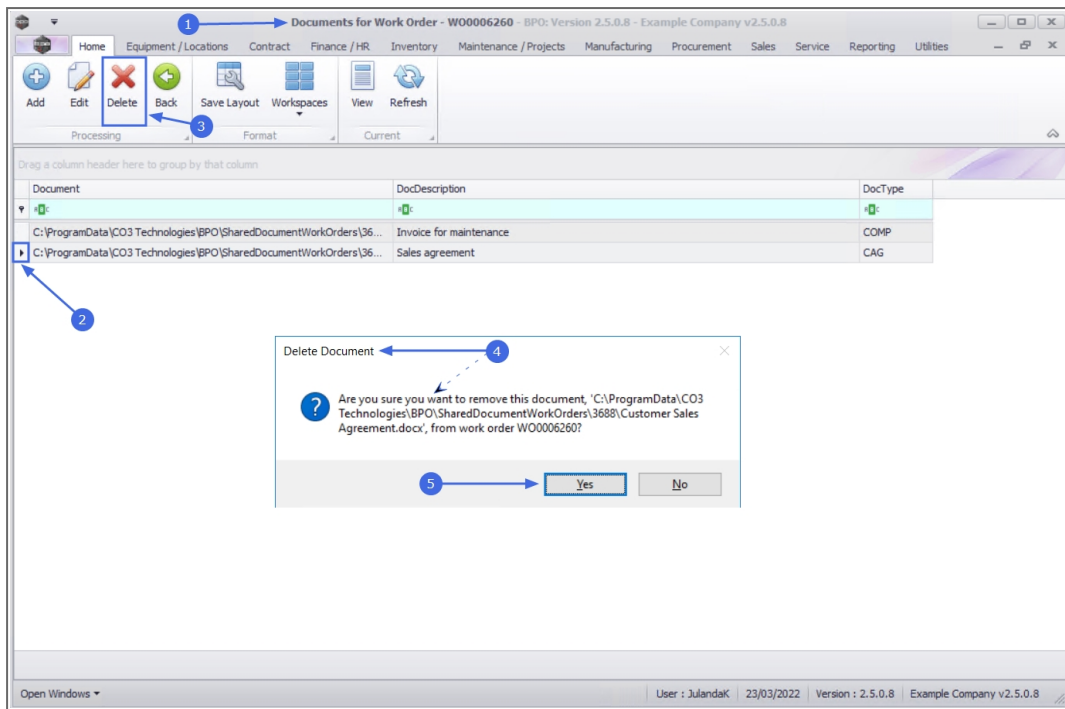
## DELETE DOCUMENT

1. From the **Documents for Work Order - [work order code]** screen,
2. Click in the **row** of the document you wish to remove from the work order.
3. Click on **Delete**.



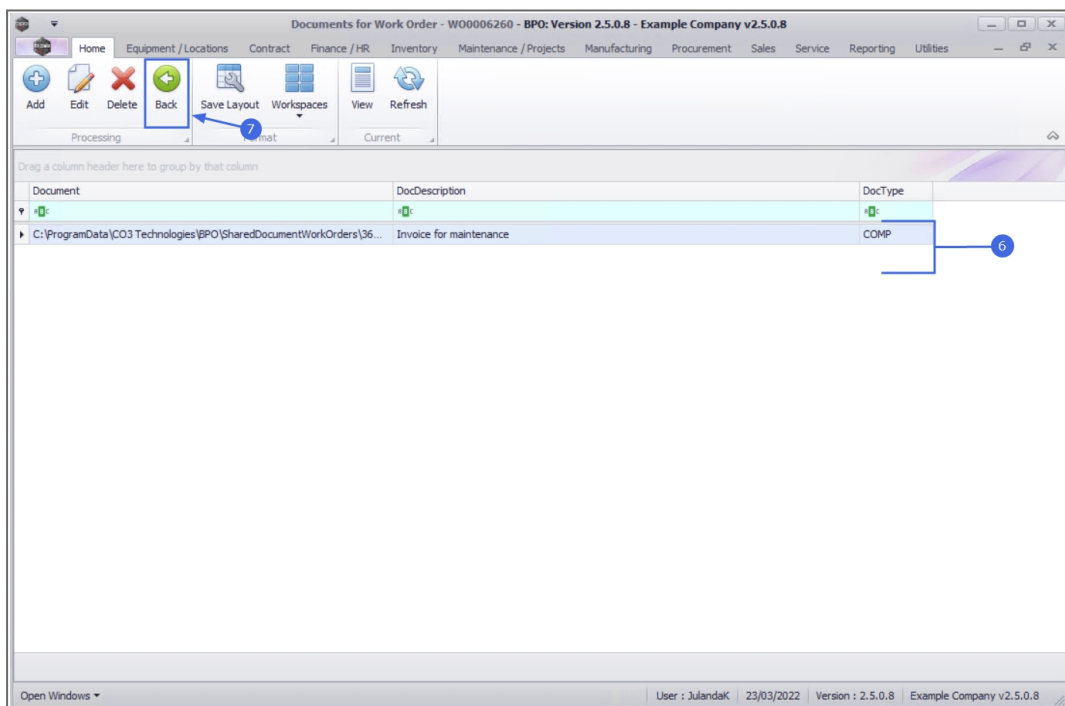
Short cut key: **Right click** to display the **Process** menu list. Click on **Delete**.

4. When you receive the **Delete Document** message to confirm;
  - **Are you sure you want to remove this document, [document path and file name], from work order [work order code]?**
5. Click on **Yes**.



6. The document has been removed from the **Documents for Work Order** screen.

7. Click on **Back** to return to the Work Order Listing screen.

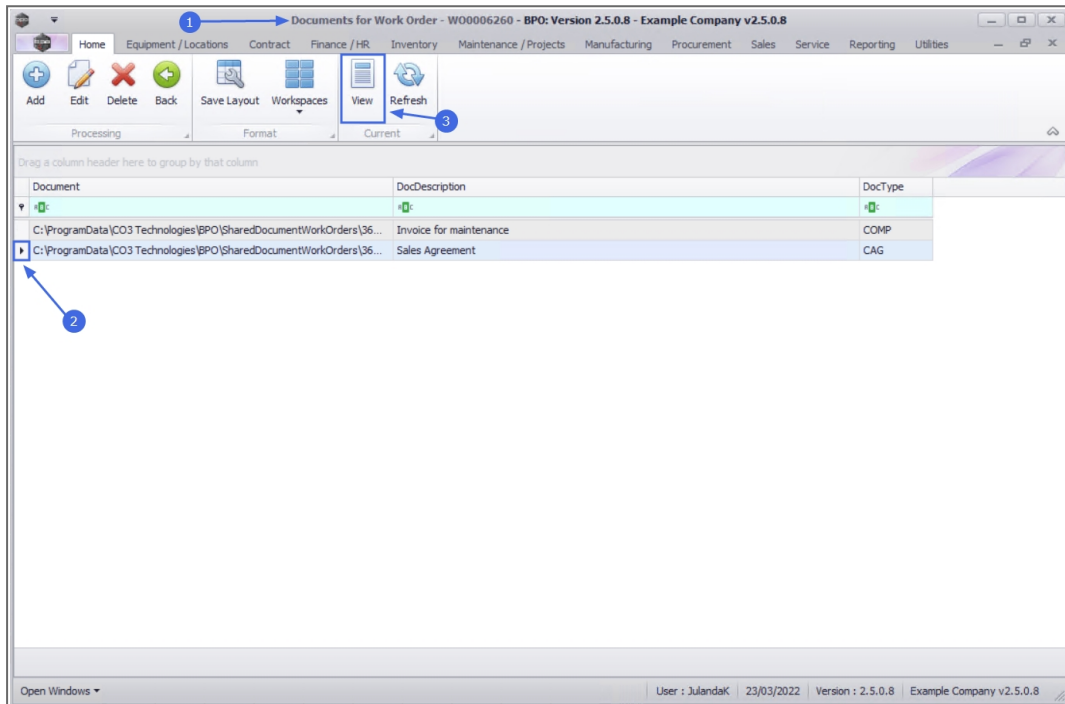


## VIEW DOCUMENT

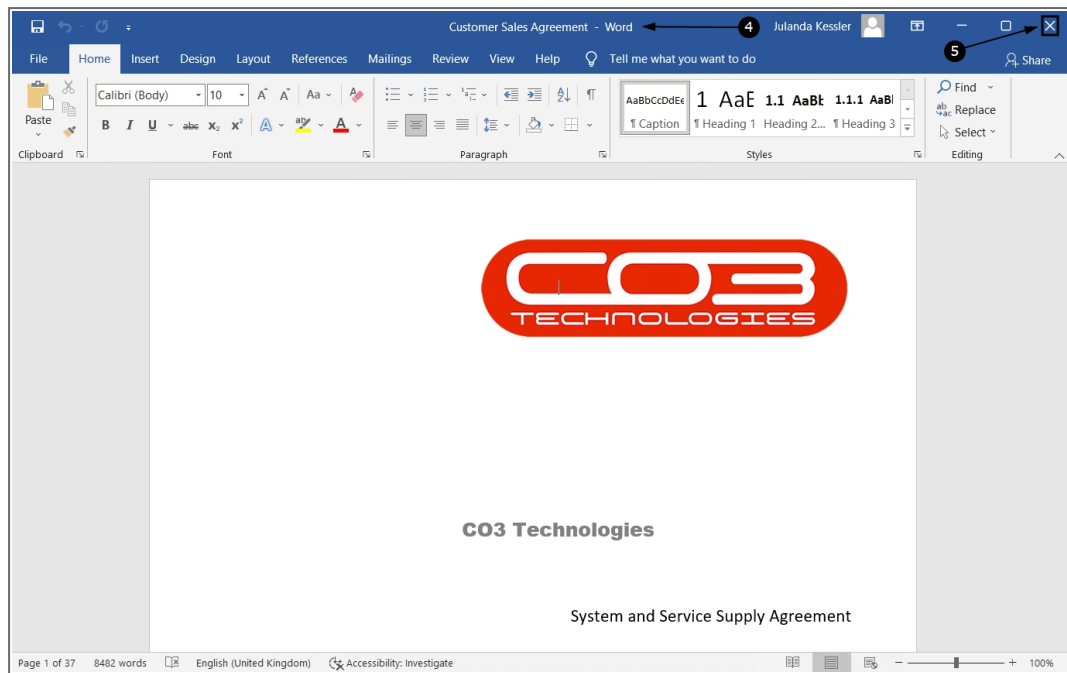
1. From the **Documents for Work Order - [work order code]** screen,
2. Click in the **row** of the document you wish to view.
3. Click on **View**.



Short cut key: **Right click** to display the **Process** menu list. Click on **View**.



4. The document will open within the relevant program.
5. When you have finished reviewing the document, **close** the screen to return to the **Documents for Work Order** screen.



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