

We are currently updating our site; thank you for your patience.

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 <u>shared folder</u> on the server.

Ribbon Access: Service > Work Orders

| • • | ▼ BPO: Version 2.5.0.4 - Example Company v2.5.0.0 | | | | | | | | | | _ D X | | | | | |
|------------|---|----------------|-----|-------------|----------------------------|-----------------|---------|-----------------|-------------|---------------------|-----------------------------|-------|---------|--|-----------|--------|
| | Equip | ment / Locatio | ns | Contract | Finance / HR | Inventory | Mainten | ance / Projects | Manufactur | ing Pro | ocurement | Sales | Service | Reporting | Utilities | |
| Tech Ma | p Sched | | | Technicians | Availability Exceptions | Site Exceptions | Calls | Call Requests | Work Orders | Service Requests | 🐉 WIP 💼 Work 🔯 Time F | - | nt 🔳 M | My Work Orders My Tickets All Open Tickets | My Work | |
| | | | Tec | hnical | | | | | Proce | ss | | | | Ticketing | Open W | \sim |

- 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.



Work Orders - Documents

| Home Equip | ment / Locations Contra Close Complex View Close Complex | 1 | te / HR Inve | ayout Print Export | • | Find WO | vice Reportir | ng Utiliti | es · | - 8 |
|-----------------------------|--|----------------------------|------------------|---|------------|--------------------------|---------------|------------|-------------|----------|
| Maintain | Proce | SS | a Forma | at a Print a | Current 3 | a Reports | 4 | | | |
| inks nter text to search | Drag a column header | | p by that column | | | | | | / | 1 |
| | WOCode • | WOType | CallReference | Description | Capitalise | CallDesc | RequestDate | Priority | Invoiceable | ProjectR |
| | ADC . | 8 8 C | 88 C | * 0 ¢ | RBC | REC | = | = | RBC | RBC |
| Expenses | ▶ E WO0006260 | REP | CN0005304 | Loan unit required while main unit is being | No | Loan unit required whil | 15/03/2022 | 3 | No | |
| Expenses 5 | WO0006259 | REP | CN0005303 | Post Contract machine repair | No | Drum replacement req | 16/02/2022 | 2 | Yes | |
| T | · WO0006258 | SERV | CN0005303 | Drum replacement required | No | Drum replacement req | 31/01/2022 | 2 | No | |
| | | NDS | CN0005274 | PROJ406OR002 | No | PROJ406OR002 | 19/01/2022 | 2 | No | |
| Travel 1 | | IMP | CN0005302 | New machine implementation. Installation | . No | New machine implemen | 24/01/2022 | 1 | No | |
| | | PR | CN0005301 | Replace part - current faulty | No | Replace part - current | 18/01/2022 | 3 | No | |
| | | REP | CN0005300 | Printer displaying error code | No | Printer displaying error | 18/01/2022 | 3 | No | |
| Documents | | ITS | CN0005299 | Paper keeps on jamming in machine | No | Paper keeps on jammin | 18/01/2022 | 3 | No | |
| | | REP | CN0005298 | Paper not feeding through rollers | No | Paper not feeding thro | 14/12/2021 | 3 | No | |
| | | SM | | BathBinMaint - Bathroom Bin Maintenance | No | | 23/11/2021 | 2 | No | PR.30000 |
| Warranties Issued | · WO0006248 | SM | | WS - Weekly Service | No | | 23/11/2021 | 2 | No | PR.30000 |
| | · WO0006247 | SM | | BathBinMaint - Bathroom Bin Maintenance | No | | 23/11/2021 | 2 | No | PR.30000 |
| | H WO0006246 | SM | | BathBinMaint - Bathroom Bin Maintenance | No | | 23/11/2021 | 2 | No | PRJ0000 |
| | ··· WO0006245 | SM | | WS - Weekly Service | No | | 23/11/2021 | 2 | No | PRJ0000 |
| Instructions | · WO0006243 | SM | | WS - Weekly Service | No | | 16/11/2021 | 2 | No | PR.30000 |
| | · WO0006242 | SERV | | 1MMS - 1 Month Machine Service | No | | 16/11/2021 | 2 | No | PR.30000 |
| | · WO0006241 | SM | | WS - Weekly Service | No | | 16/11/2021 | 2 | No | PR.30000 |
| Images | · WO0006240 | SM | | WS - Weekly Service | No | | 16/11/2021 | 2 | No | PR.30000 |
| | · WO0006239 | PR | | Rollers need replacing | No | | 11/11/2021 | 3 | No | PR.30000 |
| | E WO0006238 | PR | | Test PQ Source Type Work Order | No | | 14/11/2021 | 5 | No | |

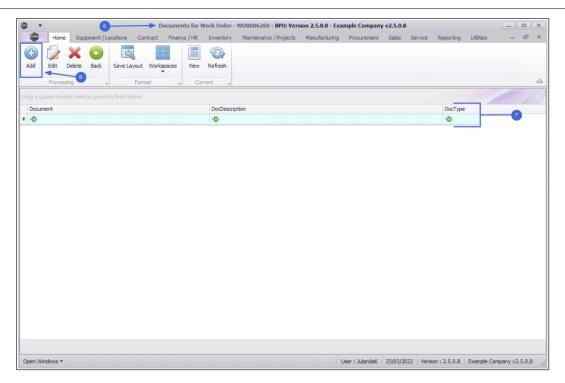
- 6. The **Documents for Work Order [**work order code**]** screen will be displayed.
- 7. Any documents that have already been **linked** to the work order will display in the data grid.

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.



| v | New Do | ocument for Work Order. : WO0006 | 5 260 - BP | 0: Version 2.5.0.8 - E | cample Compa | iny v2.5.0.8 | | - | |
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| Home Eq | uipment / Locations Contract F | inance / HR Inventory Maintena | nce / Proje | ects Manufacturing | Procurement | Sales Se | rvice Reporting | Utilities | _ @ ; |
| Save Back | | | | | | | | | 6 |
| | Drop file here | P • | | | | | | | |
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| File Description | | | Julanuar | C > Documents > C | customers | ~ | O Search Custo | | Q |
| | | Organize 🔻 New folder | | | ~ | | | ₩ ▼ □ | • |
| | | 💻 This PC | ^ | Name | | | Date modified | Туре | |
| | | n C on NBDB0068 | - 11 | 20210112 Custo | | - | 2021/01/08 2:00 PN | | |
| Doc Type | • | 📃 Desktop | | 🗐 Customer Sales | s Agreement | | 2020/01/10 12:06 | Microsoft W | ord D |
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| | | Videos | | | 1 | | | | |
| | | Local Disk (C:) | ~ | | 1 | | | | > |
| | | File name: | 20210112 | Customer Invoice | - | | All files (*.*) | | ~ |
| | | | | | • | | | Canc | el |
| | | | | | | | | | |
| Open Windows 🔻 | | | | L | Jser : JulandaK | 23/03/2022 | Version : 2.5.0.8 | Example Company | v2.5.0.8 |

- **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.



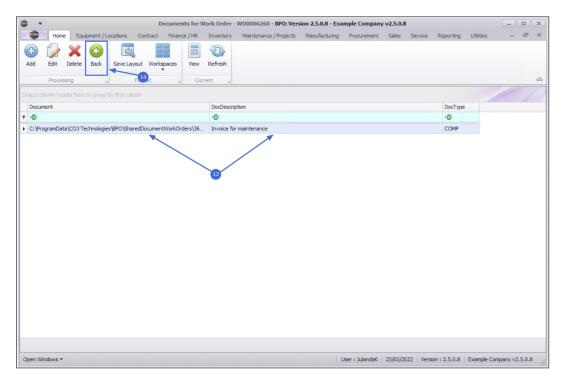
| ф т | | New | Document for | Work Order | : W00006260 - BPO: Ve | rsion 2.5.0.8 - Ex | cample Compa | ny v2.5.0.8 | 3 | | | | |
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| Path | C:\Users\JulandaK\Do | ocuments\Cust | tomers | <u>^</u> | • | | | | | | | | |
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| Repository Path | C:\ProgramData\CO3 \SharedDocumentWo | Technologies rkOrders\ | (BPO | ^ | | | | | | | | | |
| | | | | Y | | | | | | | | | |
| File Description | Invoice for maintenar | nce | | ÷ | • | | | | | | | | |
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| Open Windows 🕶 | | | | | | L | Jser : JulandaK | 23/03/202 | 2 Versi | on : 2.5.0.8 | Example Co | mpany 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.



|) = | Ne | w Document for | Work Order. | : WO0006260 - BPO: Ve | ersion 2.5.0.8 - E | cample Compa | any v2.5.0.8 | | | _ | |
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| Process 4 | | | | | | | | | | | 6 |
| File | 20210112 Customer Invoice.xlsx | | Q |]• | | | | | | | |
| Path | C: \Users \JulandaK \Documents \Cu | ustomers | ÷ + | • | | | | | | | |
| Repository Path | C:\ProgramData\CO3 Technologie \SharedDocumentWorkOrders\ | es (BPO | ÷ | | | | | | | | |
| File Description | Invoice for maintenance | | * | • | | | | | | | |
| | | Document Proc | essing 🚽 | 11 | | × | | | | | |
| Doc Type | Company Documentation | i The WOO | document : 2 0006260 has b | 0210112 Customer Invoi een saved. | ce.xlsx for work o | rder | | | | | |
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| pen Windows 🔻 | | | | | 1 | Jser : JulandaK | 23/03/2022 | Version : 2.5.0.8 | Example Co | mpany v2. | 5.0.8 |

- 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.

| Documents for W | ork Order - W00006260 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8 | _ D X | | | | |
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| Home Equipment / Locations Contract Finance / HR | Inventory Maintenance / Projects Manufacturing Procurement Sales Service | Reporting Utilities — 🗗 🗙 | | | | |
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| Document | DocDescription | DocType | | | | |
| Y 40: | *Dc | A C | | | | |
| C:\ProgramData\CO3 Technologies\BPO\SharedDocumentWorkOrders\36 | Invoice for maintenance | COMP | | | | |
| | Are you sure want to edit the document, 'C\ProgramData\CO3 Technologies'sBP0/SharedDocumentWorkOrders\3688\20210112 Customer Invoice.xfsx', for WO0006260? Yes No | | | | | |
| | | | | | | |
| Open Windows 🕶 | User : JulandaK 23/03/2022 Version | n : 2.5.0.8 Example Company v2.5.0.8 | | | | |

- 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.

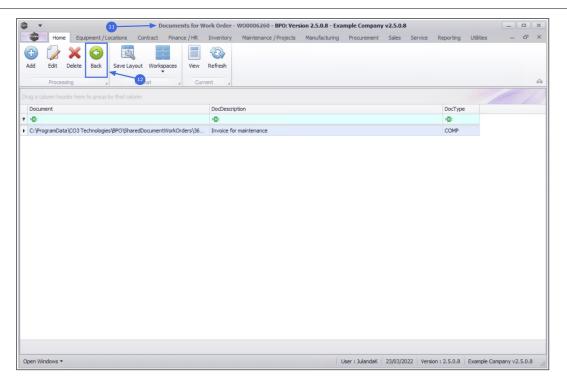


- 9. When you receive the **Document Processing** message to confirm;
 - The document : [document name] for work order [work order code] has been saved.
- 10. Click on OK.

| | 6> | Document | t Maintenano | e for Work O | rder. : W00006260 - BP | 0: Version 2.5.0.8 | 8 - Example Co | mpany v2. | .5.0.8 | | | | x |
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| Process 🔺 | - | | | | | | | | | | | | \diamond |
| File | 20210112 Customer In | voice.xlsx | | م | • | | | | | | | | |
| Path | C:\ProgramData\CO3 T \SharedDocumentWork | echnologies (E Orders (3688 | PO | ^ ~ |]• | | | | | | | | |
| Repository Path | C:\ProgramData\CO3 T \SharedDocumentWork | "echnologies\B :Orders\ | PO | |] | | | | | | | | |
| File Description | Invoice for maintenance | e | | * | * | | | | | | | | |
| Doc Туре | Company Documentatio | on | • | | Document Processing The docum WO0006260 | ent : 20210112 Cus has been saved. | - 9 stomer Invoice. | xlsx for wor | | × | | | |
| Open Windows 🕶 | | | | | | u | lser : JulandaK | 23/03/202 | 2 Version | 1:2.5.0.8 | Example Co | mpany v2.5. | 0.8 //. |

- 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.

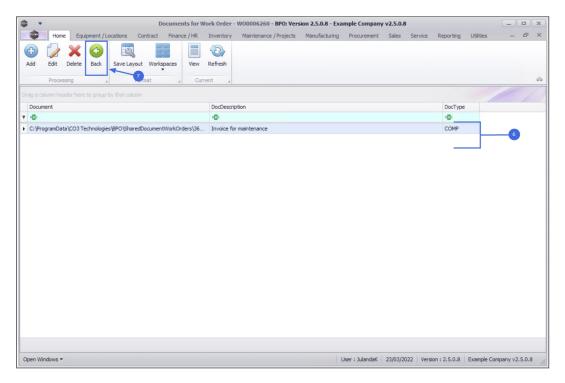
Short cut key: Right click to display the Process menu list. Click on Delete.

- 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.



| Documents for W | ork Order - WO0006260 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8 | - • × |
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| Home Equipment / Locations Contract Finance / HR | | Reporting Utilities - & × |
| | Refresh | ۵ |
| | | |
| Document | DocDescription | DocType |
| 4D: | 4 0 ¢ | * D ¢ |
| C:\ProgramData\CO3 Technologies\BPO\SharedDocumentWorkOrders\36 | Invoice for maintenance | COMP |
| C:\ProgramData\CO3 Technologies\BPO\SharedDocumentWorkOrders\36 | Sales agreement | CAG |
| Technolo | sure you want to remove this document, 'C:\ProgramData\CO3 gig:\BPO\SharedDocument\VortKorlers\3688\Customer Sales nt.docx', from work order WO0006260? | |
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| | | |

- 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

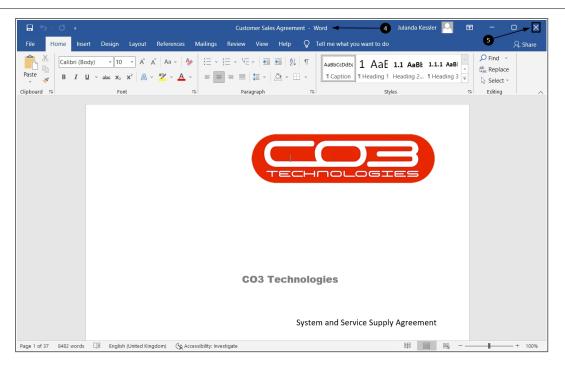
- 1. From the Documents for Work Order [work order code] screen,
- 2. Click in the **row** of the document you wish to view.
- 3. Click on View.

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

| | ork Order - W00006260 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8 | _ □ X |
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| Document | DocDescription | DocType |
| Y ==== | 40: | ·O: |
| C:\ProgramData\CO3 Technologies\BPO\SharedDocumentWorkOrders\36 | Invoice for maintenance | COMP |
| C:\ProgramData\CO3 Technologies\BPO\SharedDocumentWorkOrders\36 | Sales Agreement | CAG |
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| Open Windows 🔻 | User : JulandaK 23/03/2022 Version | n : 2.5.0.8 Example Company v2.5.0.8 |

- 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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Help v2024.5.0.7/1.0 - Pg 12 - Printed: 21/08/2024

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