

How to attach a document to a work order so that customers can see them (AlarmBiller)

11/11/2024 3:12 pm EST

AlarmBiller allows Dealers to add documents to a work order and gives the ability to be set that document as Dealer (internal) or Customer (external) facing. Follow these steps below to add a document to a work order

1. Go into the work order in question, click on the Utilities tab, click on the Docs tab and then click on the Upload files button

ABC Company

Customers

Invoices

Payments

RMR

Work Orders

Proposals

Calendar

GL

Reports

Setup

Accounting

Customers

Customer Search: name - cust #

Customers

Invoices

Payments

RMR

Work Orders

Proposals

Calendar

GL

Reports

Setup

Accounting

Customer

Void

Cancel

Save

Site: #0 Default Site - 9105 ...

Tax: None1 - 8.2500%

9105 Connecticut ave.

Cleveland, OH 44105

Requested By

(000) 000-0000

Email

Purchase Order Number

Work Order Date: 7/14/2023

System: Select a System:

Service Level: American Fire TEst

Base: \$110.00 Labor: \$200.00

Increment: 15 min. Bill After: 60 min.

Warranty Labor: No Warranty

Warranty Parts: No Warranty

Sales Package: Select a Sales Package:

Type: Service Call

Status: New

Salesperson: Unassigned Salesperson

Technician: Dan Reynolds

Warehouse: Main Warehouse - ...

Brief Description

500 characters remaining

Service Fee

Labor

Items

Parts

Est Tax

Total

RMR

\$110.00

\$0.00

\$0.00

\$0.00

\$9.08

\$119.08

\$0.00

Appointments

Items

Parts

RMR

Notes

Complete

Site Parts

Site Notes

Zones

Utilities

Site Work Order History

Docs

General Ledger

Part Ledger

Custom Fields

Documents

*Max File Size 5MB

Show Deleted Documents

Upload Files

Add Attachments

File Name

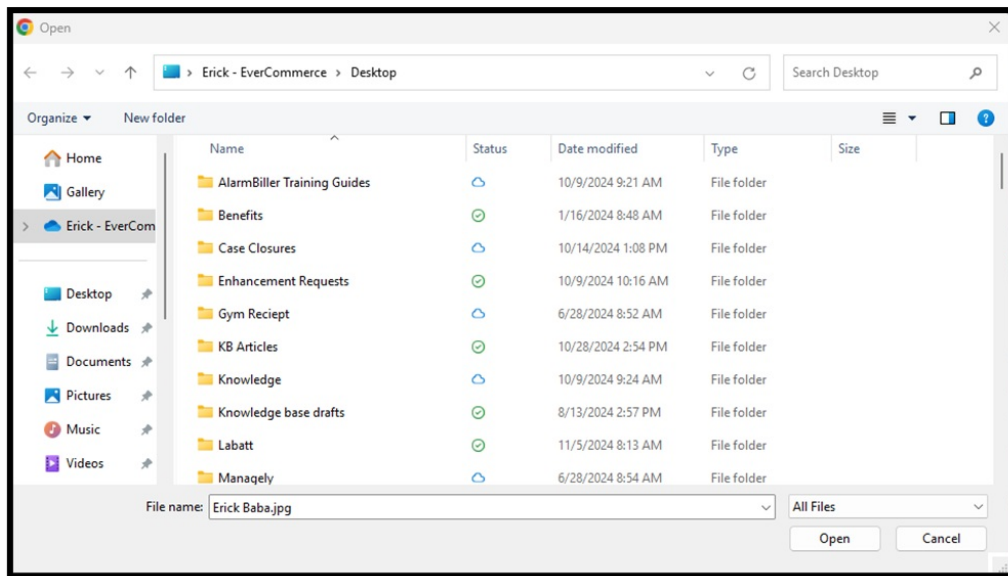
Description

Type

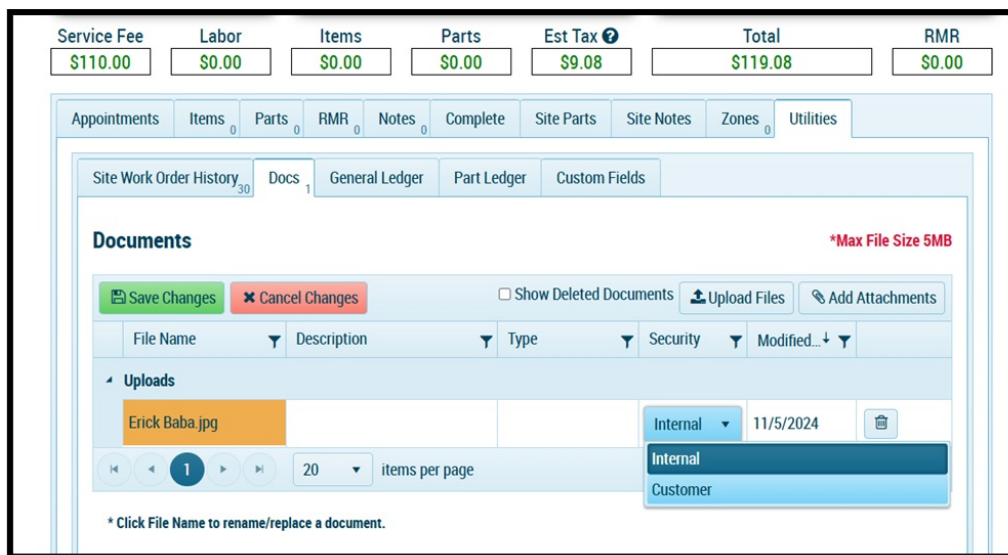
Security

Modified

2. Select the desired file and then click Open



3. Under the Security column click on 'Internal' switch this to 'Customer' push the Save Changes button and then Save the work order



4. When you email the customer the work order, the document you saved will be added as an attachment

New Work Order from ABC Company

ABC Company

999 North St
Cleveland, OH 44139

9:02 AM (0 minutes ago)

Dear peter pan,

Please find attached work order number 2515 from ABC Company for a . If you have any questions, please give us a call at (440) 247-5602 x205.

Contact Info

Email

just_an_email@my_company.com

Phone

(440) 247-5602 x205

To view the attached file use your PDF reader. Download a free PDF reader at [www.adobe.com](#).

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Erick Baba			

One attachment • Scanned by Gmail

Work_Order_2515...