

Ticket Documents

Last Modified on 01/09/2023 2:56 pm EST

Existing Documents and Scanned Documents may be attached to a Service or Inspection Ticket. When documents are attached to a Service or Inspection Ticket, they are stored as System documents on the Customer Explorer. To add a document to a Service or Inspection Ticket, follow the instructions below.

1. Open the Service Ticket or Inspection Ticket where a document will be attached.
2. Once the Service Ticket is open, select the Documents button on the ribbon.

- If selecting the New option, continue by following the instructions for [Adding General Documents](#) steps 2 through 5.

Once the document has been uploaded, it will be displayed in the Ticket Documents list [within the Ticket] and in the System Documents folder within the Customer Explorer.

- If selecting the Scan option, continue by following the instructions for [Scanning General Documents](#) steps 2 through 6.

Once the document has been uploaded, it will be displayed in the Ticket Documents list [within the Ticket] and in the System Documents folder within the Customer Explorer.

□