

ADDING A DOCUMENT TYPE TO WARRANTIES AND MAINTENANCE DOCUMENT UPLOADS

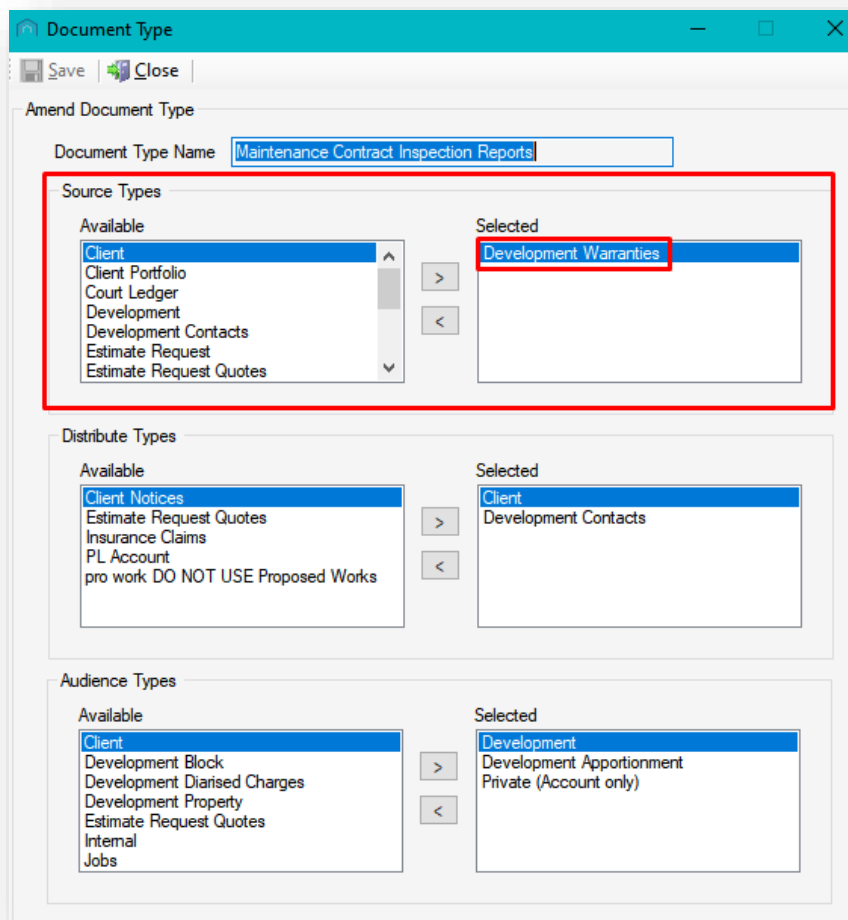
INTRODUCTION

A new feature has been developed which will allow you to assign a Document Type to a document you are receiving into the Warranties and Maintenance Documents area. This would allow you to create different document types related to warranties and maintenance contracts and be able to filter for documents of different types.

DOCUMENT TYPES

Please consult the **Document Types Training Guide** available [here](#) if you would like some help with creating additional document types.

In order for a Document Type you have created to appear as an option in Warranties and Maintenance Contracts, you will need to make sure that it has **Development Warranties** selected as a **Source Type**.



ADDING A DOCUMENT

Documents can only be added by opening an individual warranty or maintenance contract and clicking to select the **Documents** tab towards the bottom-left of the screen.

Warranty/Maintenance Details for Contract: 00001

Save and Close | Close

Contract Number 00001

Description Franciscan Court Emergency Lighting Maintenance Contract

PL Account Number 1003 Electrician 101

Job Type EL Electrical

Telephone ** 0141 611 5228 Main

Effective Date 01/04/2023 Expiry Date 31/03/2024

Retender Date 03/07/2023 Expiry Days 365 Use Development Value

Other Dates Total Diarised Amount 0.00

Notes N/A

Warranty History Documents

Created Date	Effective Date	Expiry Date	Retender Date	Description	Notes	Total Diarised Amount	Deleted
03/07/2023	01/04/2023	31/03/2024	03/07/2023	Franciscan Court Emergency Light...	N/A	0.00	<input type="checkbox"/>

You will not be able to see the **Documents** tab within a specific warranty or maintenance contract from the Warranties and Maintenance Contracts tab of a development if you have not been assigned the correct permissions. The individual permission required is **Development – DevelopmentTab Warranties Document**.

Clicking to select the **Documents** tab will display the following:

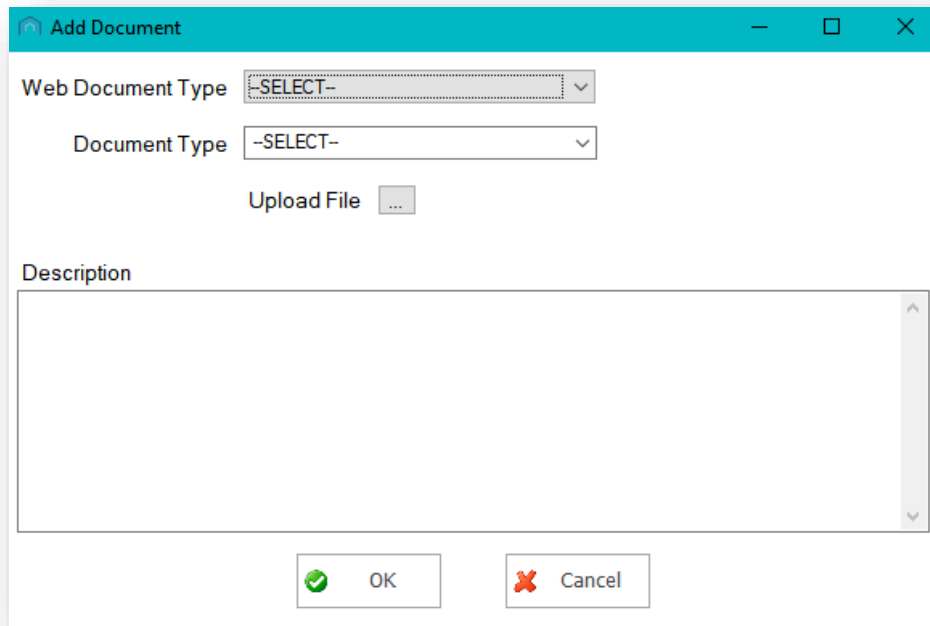
Warranty History Documents

Add Filter: -SELECT-

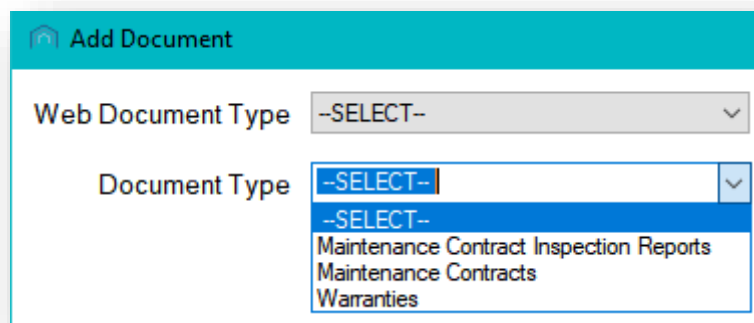
Date	Document Type	Description	Web Type
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You can click on the **Add** button to add a document related to the warranty or maintenance contract.





This opens the **Add Document** screen where you will see there is now an option to select a **Document Type** for the document you are receiving in.



Any document types you have created with a **Development Warranties** Source Type will be available for you to select from.



You will be able to use the **Filter** field in the Documents tab on the individual warranty or maintenance contract to filter for only documents of individual types you have added.

Warranty History		Documents	
 Add  Amend  Delete		Filter: Maintenance Contrac 	
Date	Document Type	Description	Web Type
03/07/2023 14:47	Maintenance Contracts	Franciscan Court Emergency Lighting Maintenance ...	

LOCATING YOUR UPLOADED DOCUMENTS

Once documents have been added, you will also be able to use the filter on the main Warranties and Maintenance Contracts tab to filter for documents of a specific type across all warranties and maintenance contracts in the development.



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