

# Add Notes to a Work Order

Last Modified on 05/05/2022 2:26 pm EDT

To add Notes to a Work Order, open the work order from the customer record or from Accounts Receivable > Work Orders.

Once the work order is displayed, click on the Notes tab, and then click on the edit button at the upper right of the page. Click on the Add Note button.

The screenshot shows the 'Work Order 2563' interface. At the top, there are 'Save', 'Cancel', and 'Void' buttons. Below that, the work order details are displayed, including 'Wood, Emily - 3719', 'Emily Wood', and 'Burglar Alarm - 9173-01'. A summary box on the left shows costs: Service Fee \$85.00, Labor \$93.75, Parts \$0.00, and Total \$199.48. The main form contains various fields for status, site, system, tax, type, requested by, phone, email, PO number, technician, salesperson, sales package, service level, and warehouse. Below the form is a navigation bar with tabs for Appointments, Items, Parts, RMR, Billing, Notes (1), System Parts, System Notes, Documents, and Custom Fields. The 'Notes' tab is active, showing a table with two existing notes. A green circle highlights the '+ Add Note' button in the top left of the notes section.

Note	Modified	Modified By	Type	Expiration	
Motion installed in office. Verified signals with central station.	Apr 1, 2022, 11:41:17 AM	Papay, Travis	Standard		Edit Delete
Install motion in office	Apr 1, 2022, 11:15:26 AM	Papay, Travis	Standard		Edit Delete

The Note Edit form will be displayed. Fill in the form, and then click on the Save button at the bottom of the form when finished.

Click the Save button at the upper right of the page.

The 'Note Edit' form is shown in a modal window. It contains a text area for the note with a character count of 0/500. Below the text area is a dropdown menu for 'Type' set to 'Standard'. There is also a date picker for 'Expiration Date'. At the bottom of the form are 'Save' and 'Cancel' buttons.