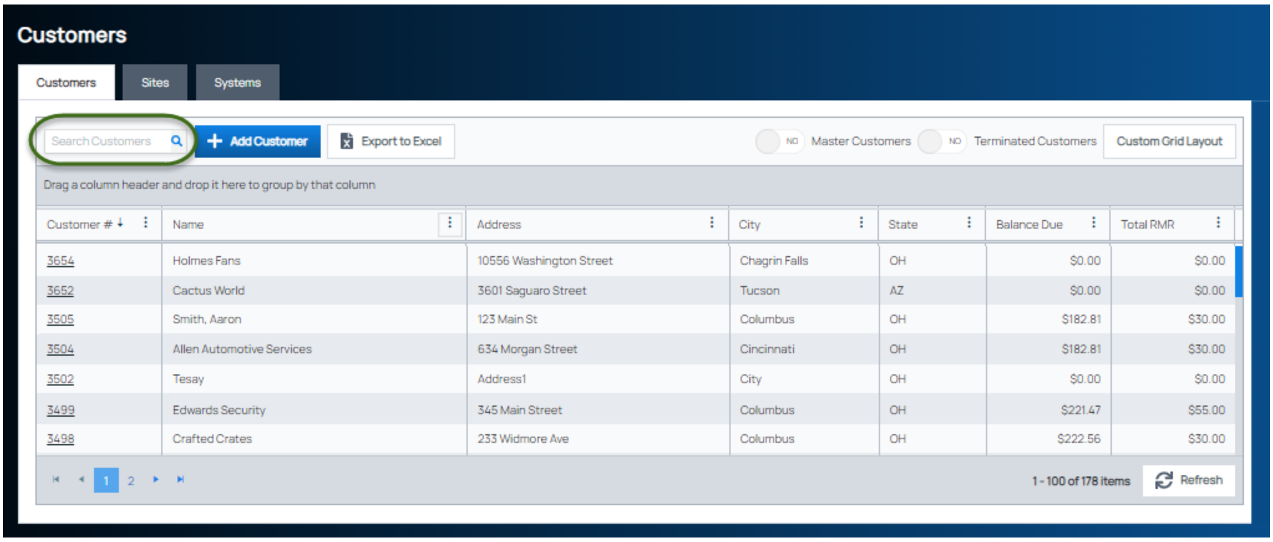
Add a Work Order Note

Last Modified on 12/16/2024 3:09 pm EST

To add a Work Order Note, you must first access the customer record.

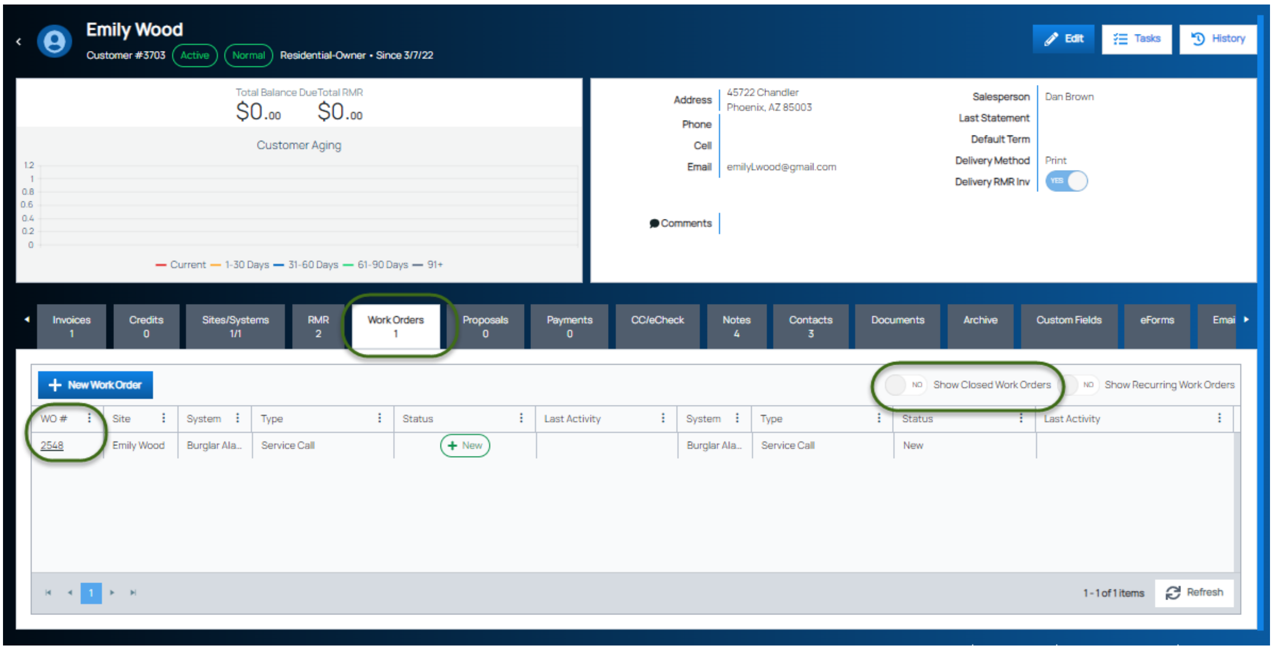
From the main menu, arrive at the Customers list with this path: CRM > Customers.

The Customers list opens. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.

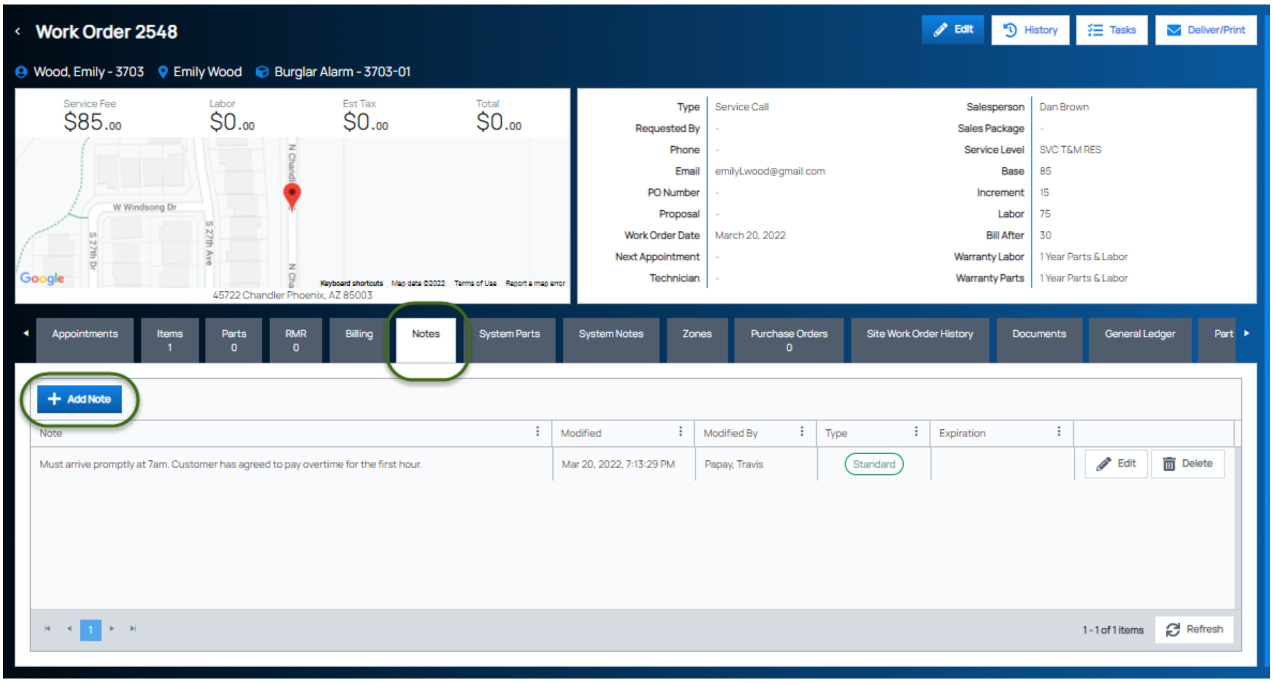


The Customer record opens. Click on the Work Orders tab. A list of all open Work Orders is displayed. In the WO# column, click on the hyperlink of the Work Order for which you want to add a Note.

If the Work Order has been closed, click the **Show Closed Work Orders** button to locate the work order.



The Work Order record opens. Click on the Notes tab, and then click the **Add Note** button.

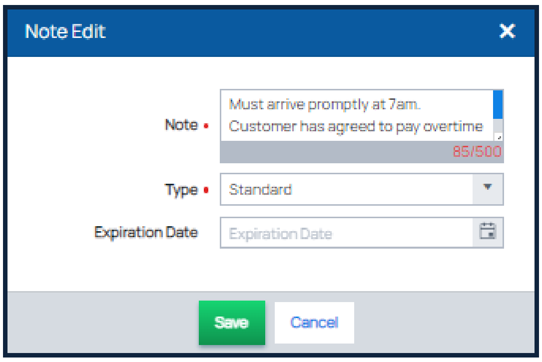


The Note Edit form opens. Each data entry field is described below.

Data Entry Fields

Data entry fields preceded with an asterisk are required.

- *__Note__: Type in the note. Maximum of 500 characters allowed.
- *__Type__: Make a selection from the drop-down list — either Critical or Standard. You can save multiple notes with the Critical Type.
  - Critical Type — If the note is saved with this type, whenever the Customer record is accessed, this note will pop-up on the page.
  - Standard Type — This type is selected for non-critical notes.
- **Expiration Date**: If you selected Critical in the type field, and you want this note to stop popping-up after a certain period of time, then enter the end date for the critical note.



When finished filling in the form, click the **Save** button at the bottom of the form.