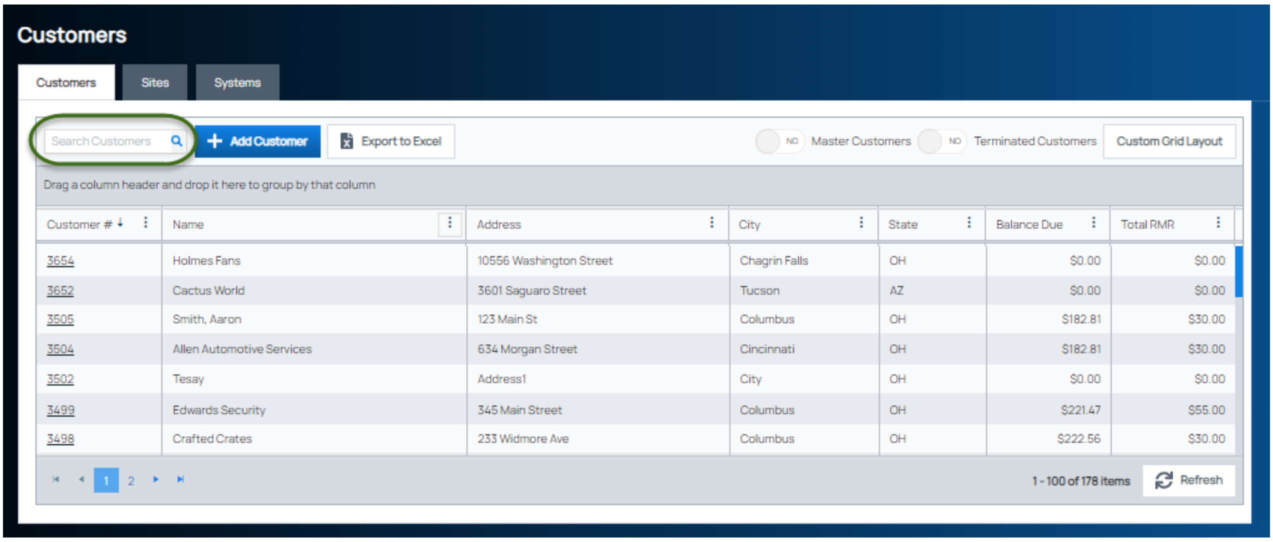
Edit a Work Order Note

Last Modified on 12/16/2024 3:14 pm EST

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

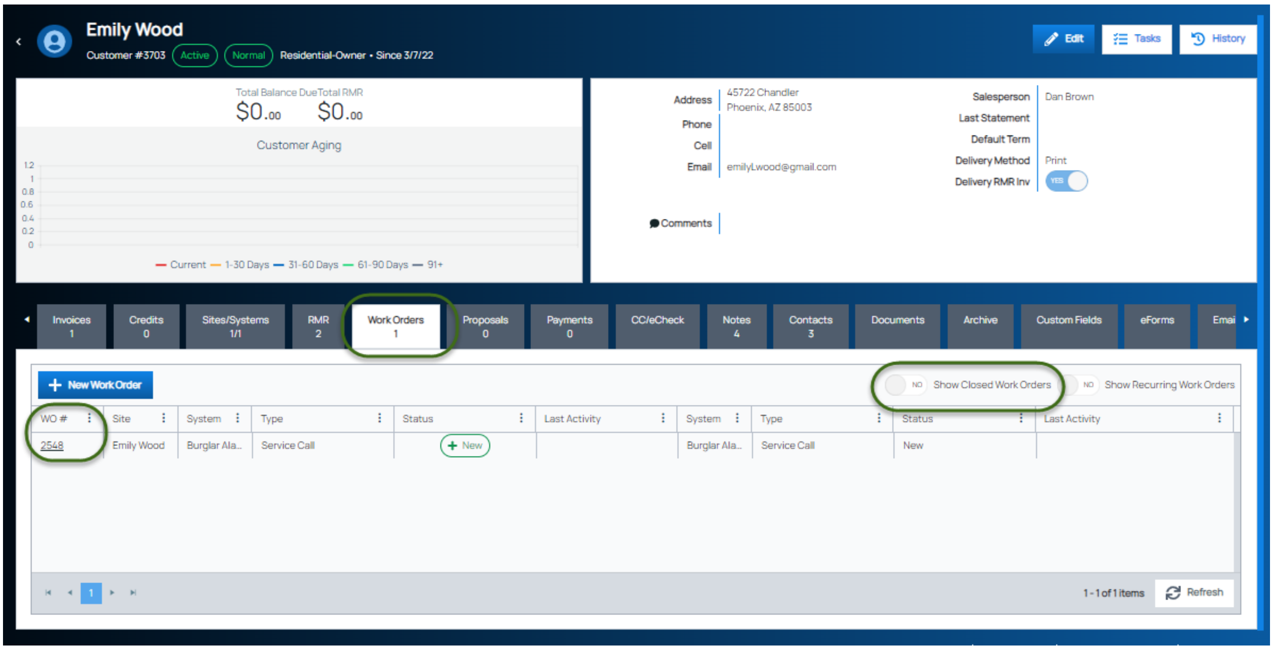
From the main menu, arrive at the Customers list with this path: CRM > Customers.

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

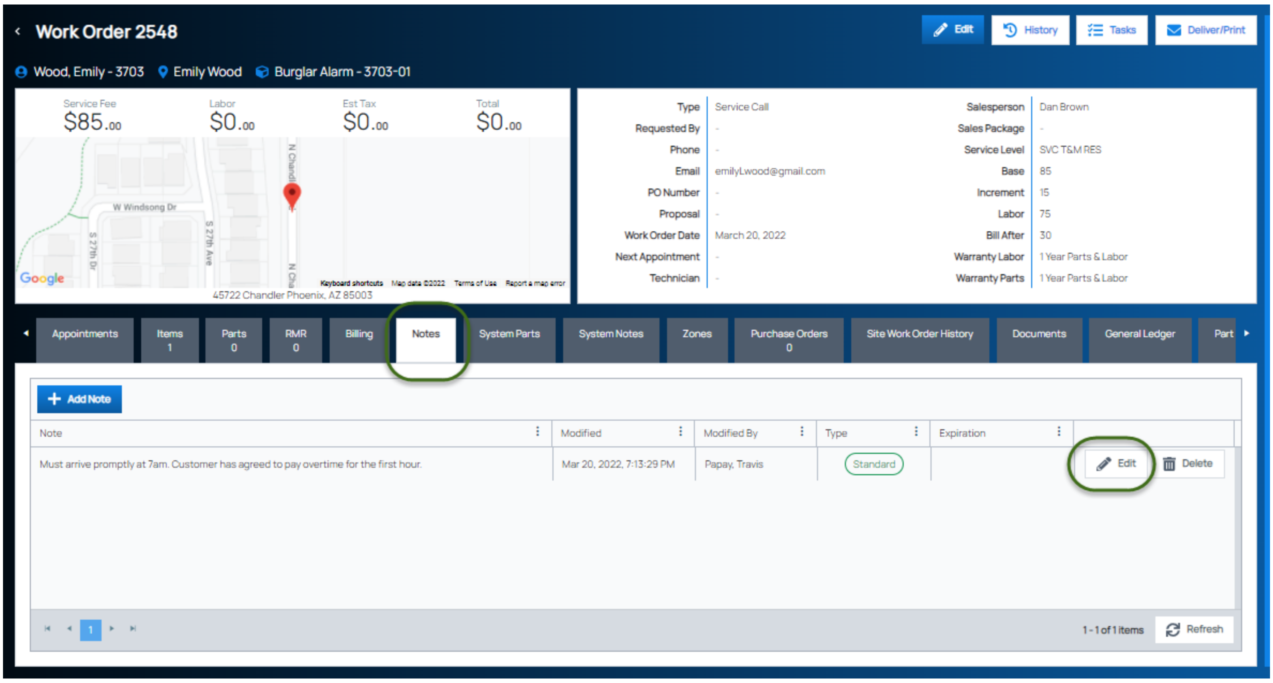


The Customer record opens. Click on the Work Orders tab. A list of all open Work Orders is displayed. In the WO# column, click on the hyperlink of the Work Order for which you want to add a Note.

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. Locate the note you want to edit, and then click on the Edit button (pencil icon).



The Note Edit form opens. Make the necessary changes, and then click the **Save** button when finished.