

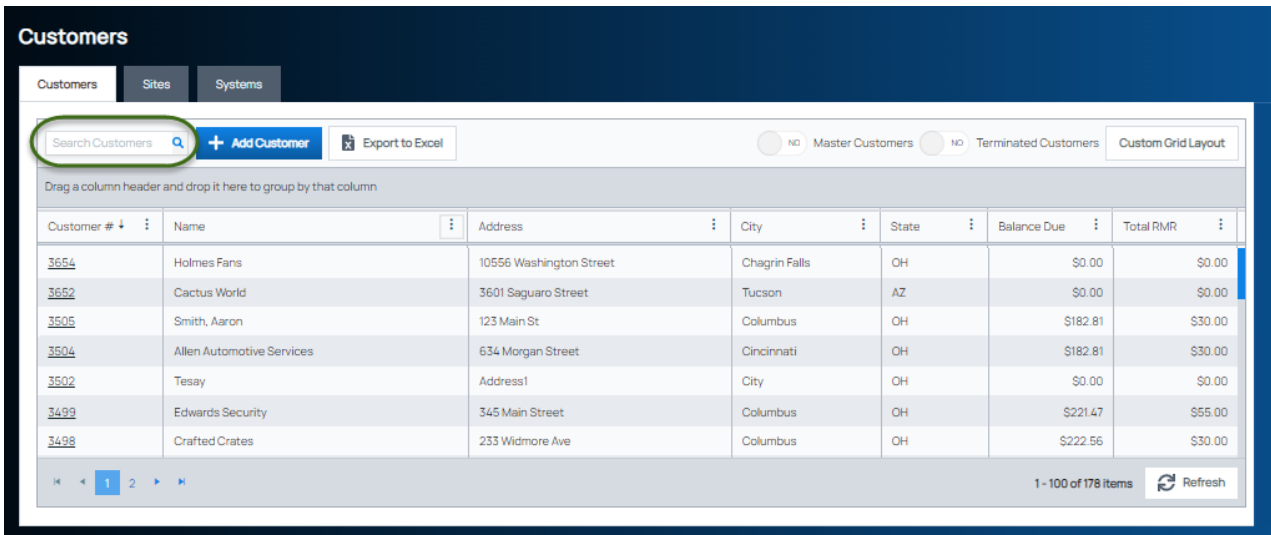
Edit a Work Order Note

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

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

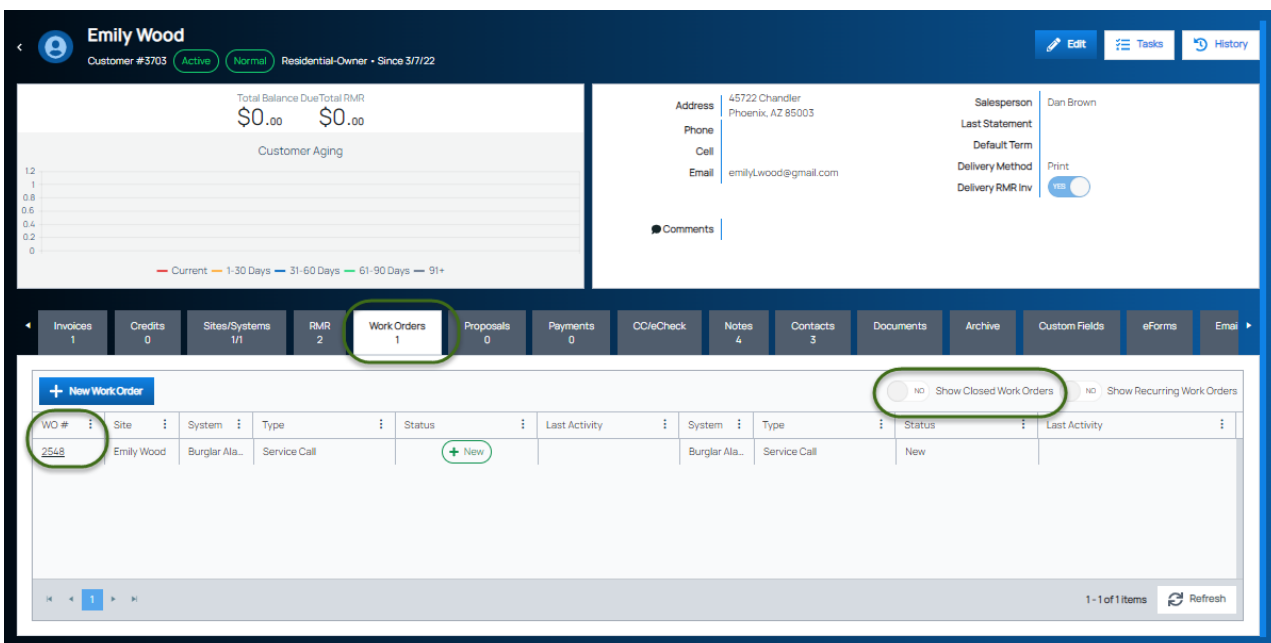
From the main menu, arrive at the Customers list with this path: CRM > Customers.

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).

Work Order 2548 Edit History Tasks Deliver/Print

Wood, Emily - 3703 Emily Wood Burglar Alarm - 3703-01

Service Fee	Labor	Est Tax	Total
\$85.00	\$0.00	\$0.00	\$0.00

45722 Chandler Phoenix, AZ 85003

Type	Service Call	Salesperson	Dan Brown
Requested By	-	Sales Package	-
Phone	-	Service Level	SVC T&M RES
Email	emilylwood@gmail.com	Base	85
PO Number	-	Increment	15
Proposal	-	Labor	75
Work Order Date	March 20, 2022	Bill After	30
Next Appointment	-	Warranty Labor	1 Year Parts & Labor
Technician	-	Warranty Parts	1 Year Parts & Labor

Appointments Items 1 Parts 0 RMR 0 Billing **Notes** System Parts System Notes Zones Purchase Orders 0 Site Work Order History Documents General Ledger Part

+ Add Note

Note	Modified	Modified By	Type	Expiration	
Must arrive promptly at 7am. Customer has agreed to pay overtime for the first hour.	Mar 20, 2022, 7:13:29 PM	Papay, Travis	Standard		Edit Delete

1 - 1 of 1 Items Refresh

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

Note Edit ✕

Note • 85/500

Type •

Expiration Date