Delete a Work Order Note

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

To delete 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.

Customers									
Customers Site	s Systems								
Search Customers	२ 🕂 Add Customer 🗴	Export to Excel			Master Cust	corners NO Te	erminated Customers	Custom Grid Layout	
Drag a column header and drop it here to group by that column									
Customer # ∔ :	Name	÷	Address	÷	City :	State :	Balance Due	Total RMR	
3654	Holmes Fans		10556 Washington Street		Chagrin Falls	он	\$0.00	\$0.00	
3652	Cactus World		3601 Saguaro Street		Tucson	AZ	\$0.00	\$0.00	
3505	Smith, Aaron		123 Main St		Columbus	ОН	\$182.81	\$30.00	
<u>3504</u>	Allen Automotive Services		634 Morgan Street		Cincinnati	ОН	\$182.81	\$30.00	
3502	Tesay		Address1		City	ОН	\$0.00	\$0.00	
<u>3499</u>	Edwards Security		345 Main Street		Columbus	ОН	\$221.47	\$55.00	
<u>3498</u>	Crafted Crates		233 Widmore Ave		Columbus	ОН	\$222.56	\$30.00	
K < 1 2 ► K 1-100 of 178 items 2 Refresh									

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 delete a Note.

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

Customer #3703 (Active) Normal Residential-Owner - Since 3/7/22	Carl 🔁 Tasks 🍏 History								
Total Balance Due Total RMR \$0.00 \$0.00	Address 45722 Chandler Salesperson Dan Brown Phoenic, AZ 85003 Last Statement								
Customer Aging	Ceil Default Term Default Term Print Email emilyLwood@gmail.com Delivery RMR Inv @								
Current — 1-30 Days — 31-60 Days — 61-90 Days — 91+ Invoices Credits Sites/Systems RMR Work Orders Proposals Payr 1	nents CC/eCheck Notes Contacts Documents Archive Custom Fields eForms Emei ▶ 0								
+ New Work Order									
WO # : Site : System : Type : Status : Last. 2548 Emily Wood Burglar Ala Service Call (+ New) (+ New)	tctivity i System i Type i Status Last Activity i Burglar Ala Service Call New								
ж « <mark>1</mark> » ж	1-1of1items 🖉 Refresh								

The Work Order record opens. Click on the Notes tab. Locate the note you want to delete, and then click the **Delete** button (trashcan icon).

Work Order 2548						🥒 Edit 🏐 H	istory 🔚 Tasks 💟 Dellver/Print					
🛛 Wood, Emily - 3703 🔮 Emily Wood 📦 Burglar Alarm - 3703-01												
Wood, Emily - 3703 Emily - 3703 Service Free \$85.ao Windsong Dr Winds	Vy Wood C Burglar A	Narm - 37/03-01 Ext Tax \$0.00 wyseed solutors Net 52 52 A/2 65003 Billing Note	Total \$0.00 22 Temsofilas Agostanzaseror 5 System Parts	Type Requested By Phone Email PO Number Proposal Work Order Date Naxt Appointment Technician System Notes Zone	Service Call entity wood@gmail.com March 20, 2022 Purchase Orders Purchase Orders	Selesperson Sales Package Service Level Base Increment Labor Bill After Warranty Labor Warranty Parts Site Work Order History Doo	Den Brown - SVC T&M RES 85 15 75 30 1 Year Parts & Labor 1 Year Parts & Labor 1 Year Parts & Labor uments General Lødger Part					
Note Must arrive promptly at 7am. Cust H 4 1 M H	omer has agreed to pay over	time for the first hour.	i	Ane you sure you want to del	ite the note?	e : Expiration	Edit Delete					

A confirmation message opens. Click **Yes** to delete the record.