

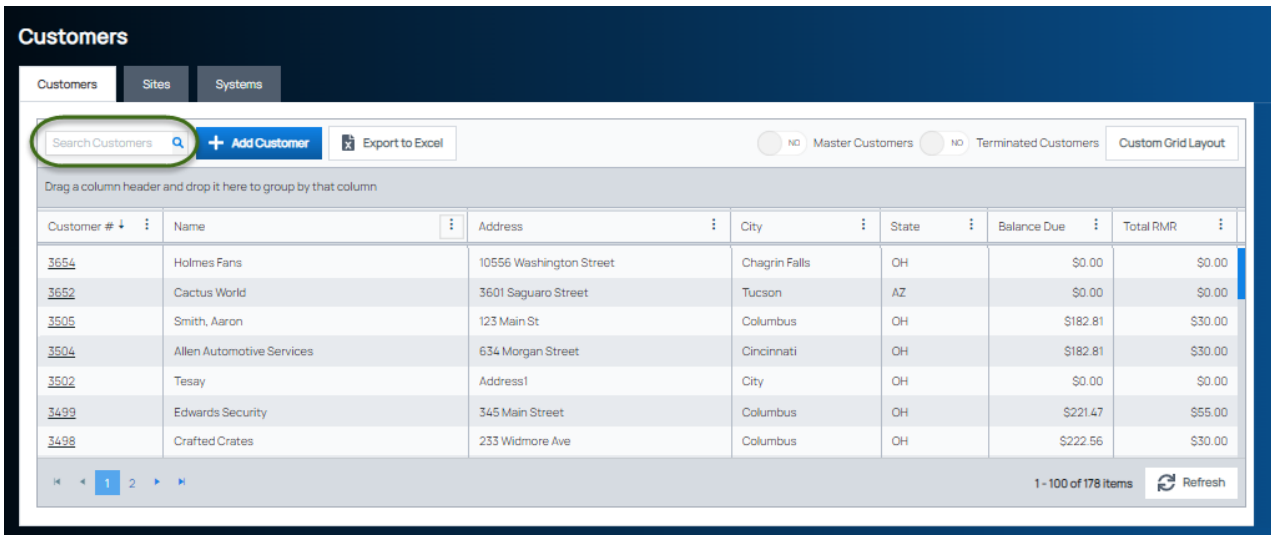
Delete a Work Order Note

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

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

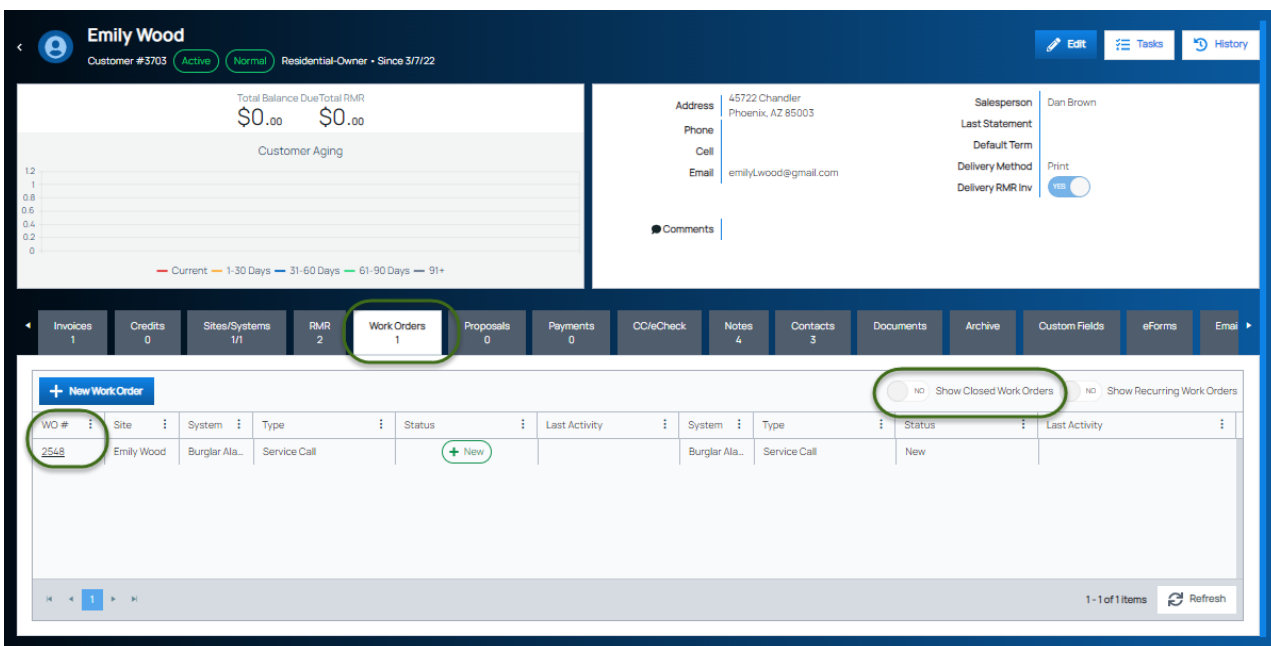
From the main menu, arrive at the Customers list with this path: CRM > Customers.

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.



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.



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 History Tasks Deliver/Print

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

Service Fee	\$85.00	Labor	\$0.00	Est Tax	\$0.00	Total	\$0.00
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Map: 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: Must arrive promptly at 7am. Customer has agreed to pay overtime for the first hour.

Type	Expiration	
Standard		Edit Delete

1 - 1 of 1 Items Refresh

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