Work Order Custom Fields

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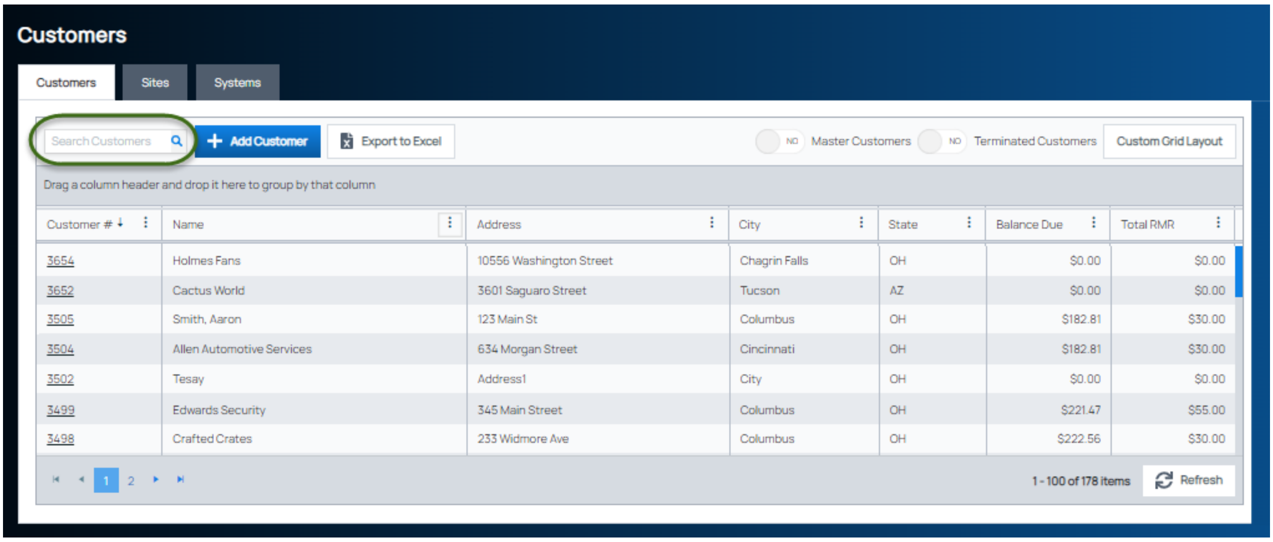
To access the Work Order Custom Fields, you must first access the customer record.

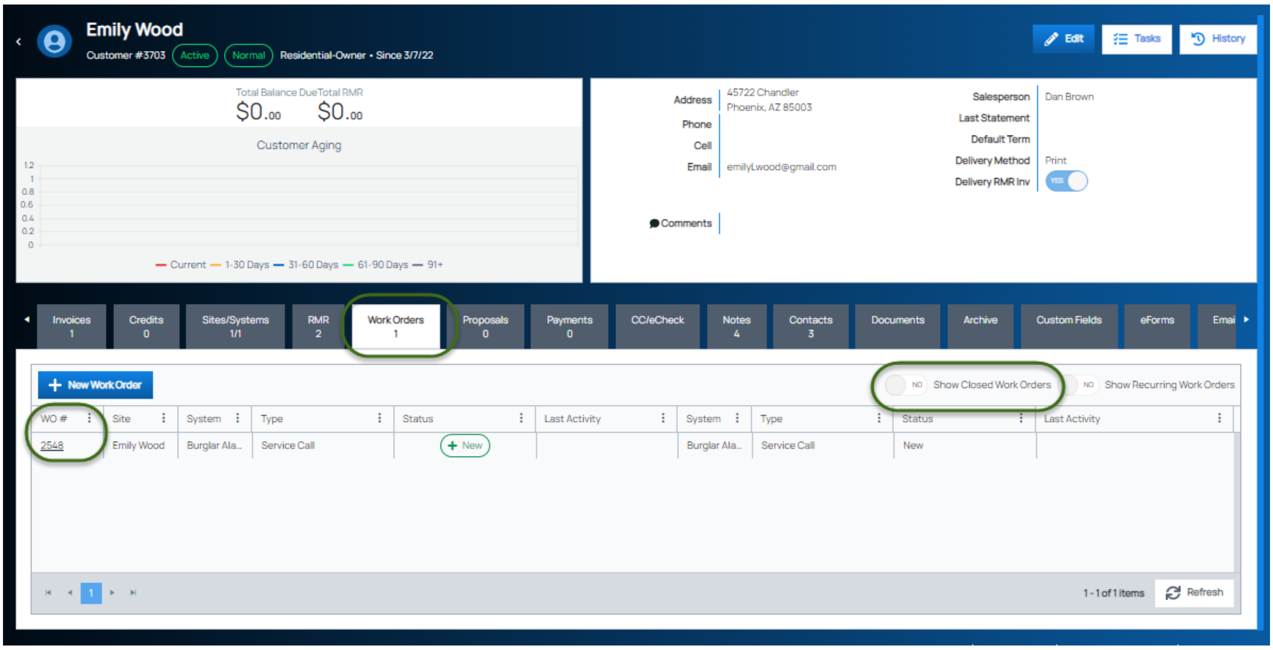
From the main menu, arrive at the Customers list with this path: CRM > Customers.

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.



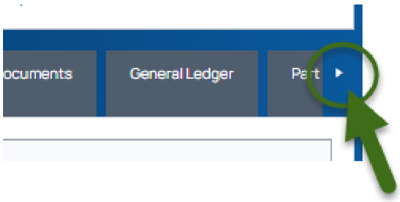
The Customer record opens. Click on the Work Orders tab. A list of all open Work Orders is displayed. In the WO# column, click on the hyperlink of the Work Order for which you want to access the custom fields.

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 Custom Fields tab.

Depending on your screen resolution, you may need to click the right arrow to the far right of the work order tabs to see the Custom Fields tab.



In the bottom panel of the page, the custom fields are displayed. Enter information according to your company's policies and procedures.

When finished entering information, click the **Save** button.