

Update Work Order Custom Fields

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To update the Custom Fields information on a Work Order, open the work order from the customer record or from Accounts Receivable > Work Orders.

Once the work order is displayed, click on the Custom Fields tab, and then click on the edit button at the upper right of the page. Update the fields according to your company's policy and procedures. Click the Save button when finished.

The screenshot displays the 'Work Order 2563' interface. At the top, there are navigation buttons for 'Save', 'Cancel', and 'Void'. Below this, the work order details are shown: 'Wood, Emily - 3719', 'Emily Wood', and 'Burglar Alarm - 9173-01'. A summary box on the left lists costs: Service Fee (\$85.00), Labor (\$93.75), Parts (\$0.00), and Total (\$199.48). The main form contains various fields: Status (New), Site (#3719-01 Emily Wood - 45722 Chandler), System (Burglar Alarm - 9173-01), Tax (MI), Type (Service Call), Requested By (Emily Wood), Phone ((734) 258-4646), Email (emilyLwood@gmail.com), PO Number (Purchase Order), Work Order Date (4/1/2022), Technician (Carolyn Johnson), Salesperson (Dan Brown), Sales Package, Service Level (Time and Material Residential), and Warehouse (Main Warehouse). A navigation bar at the bottom includes tabs for Appointments, Items (1), Parts (0), RMR (0), Billing, Notes (1), System Parts, System Notes, Documents, and Custom Fields. The Custom Fields tab is active, showing a 'CustomerSatisfied' toggle switch set to 'ON'.