Re-Open a Job

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If a Job is closed, and it is later realized that additional costs or invoicing needs to be added to the Job, the Job may be re-opened for such purposes.

Keep in mind, this may affect Job Costing reports if the Job was closed in one month and costs and/or income was added in a subsequent month.

The ability to Re-Open a Job is controlled through User Group Security permission.

Follow the instructions below to re-open a closed Job.

1. Locate the Job to be Re-Opened either from the Customer Explorer or navigate to the Job Management module and select the Job Queue menu option.

2. The Open Job List will be displayed. At the top of the form, click the drop-down arrow in the Job Status filter field and select the status of Closed.

3. A list of all closed Jobs will be displayed. Locate the Job to be re-opened and double-click on the Job line to open the Job record.

4. From the Job toolbar, click the Tasks button. Click the Re-Open Job button located at the lower right of the form.

3. The Re-Open Job form will be displayed. Fill in the fields on the form as needed then click the Save button.

- Job Task - Select a Job Task that will be added to the Job Task List for the purpose of re-opening the Job.
- Job Status - The Job Status will default to Re-Opened; it is recommend this status not be changed.
- Comments - You may enter a comment up to 256 characters to describe why the job is being reopened. This field is optional but highly recommended.
- Reason - Enter the Reason the Job is being reopened. This field is optional but highly recommended.
- Change Order - If the Job is being re-opened for the purpose of:
  - Creating a Change Order to add additional billable charges, select this option
  - If the job is being re-opened to add expenses to the job, do not select this option.

4. If the Change Order option was not selected on the Job Re-Open form, the Job record will open to the Sales Summary form.

If the Change Order option was selected, the New Change Order form will be displayed. Enter a Sold Date; this is typically the date the change order was authorized by the customer. If your company is using the Sales Period Close function, and the date on which the change order was authorized is in a closed sales month, you must enter a date in the current sales month. It is always a good idea to enter notes into the change order form; this field has a 256 character limit.

Click the Apply button located at the lower right of the form when finished.

Process the Change Order as you would any other change order. For information on processing Change Orders, follow the link.

If additional invoicing will be done, complete all invoicing then close the job using the normal job closing process.

If the Job was re-opened without a Change Order, after entering the additional expenses, close the job using the normal job closing process.