How to Delete a Job

Last Modified on 09/16/2024 3:33 pm EDT

Sometimes jobs are added to a wrong site or even system. A question was asked, “Can I delete this job that is wrong?” The answer is yes the job can be deleted. The step below will show how to do this for SedonaOffice versions 6.2.x.

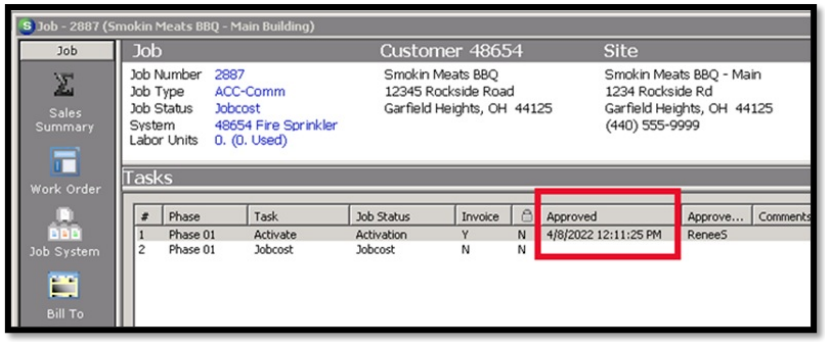
Overview

There are certain criteria that will need to be met in order to delete an unwanted job.

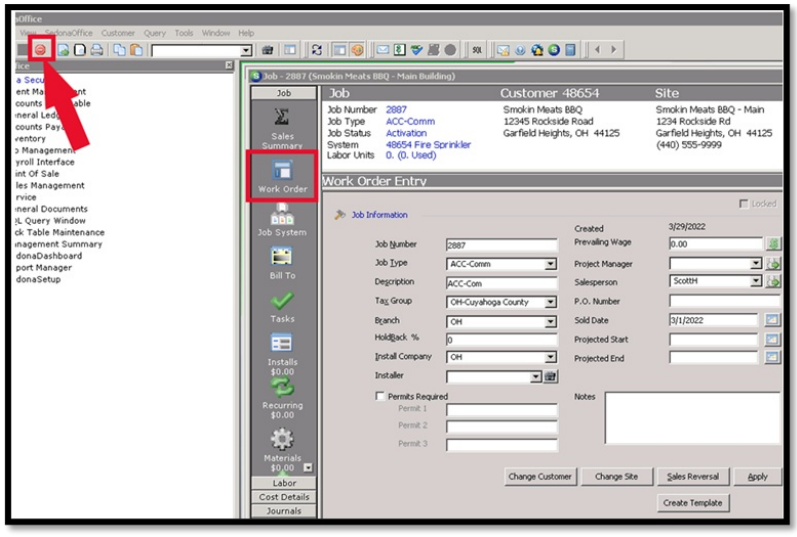
Steps:

Deleting a Job:

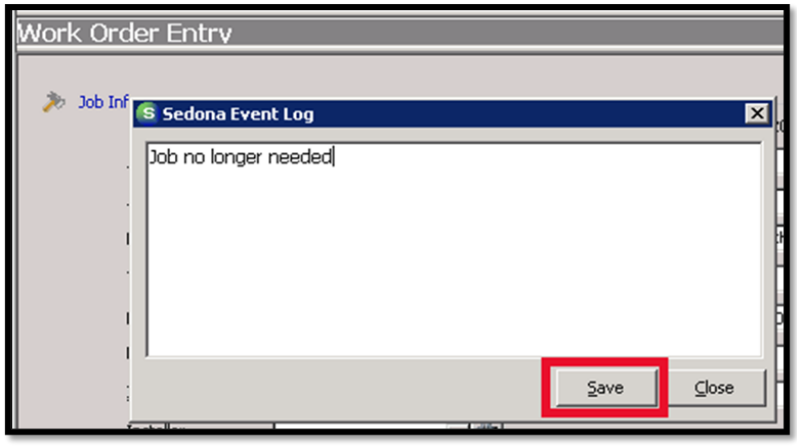
1. Make sure there are no Tasks that have been approved by going into the Tasks Tab. If there are approved tasks, unapprove them and save.



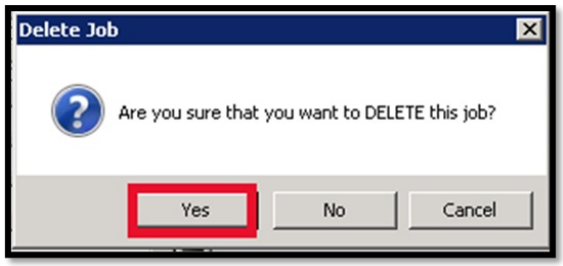
2. Then Click on the Work Order Entry - The Red Delete button in the task bar, should be available - Click on it



3. Click on Save Button after adding note



4. Click on Yes to Delete

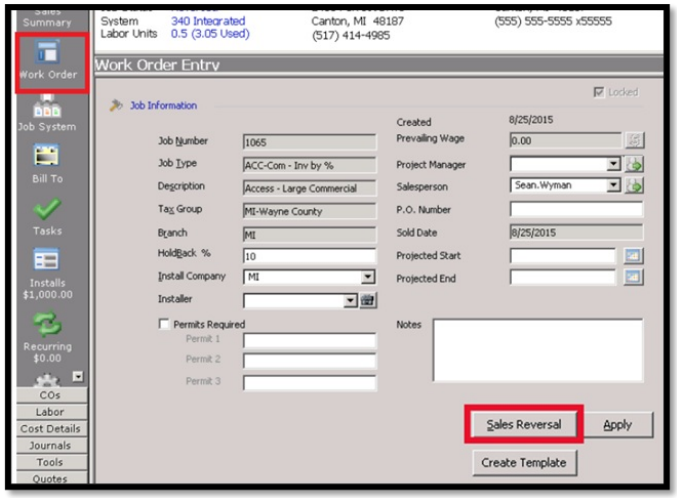


5. Look at Open Jobs to make sure no longer showing

- *If you get an error message about not being able to delete or if there is no Red Delete button available, then you will need to do a Job Reversal.*

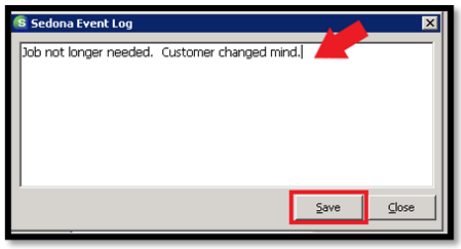
Job Reversal:

1. Click on Work Order button to open the Work Order Entry.

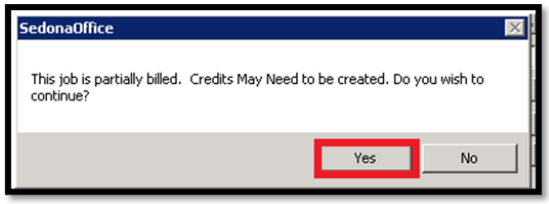


Then click on Sales Reversal Button

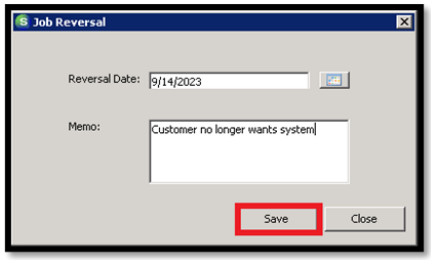
2. Add a note on why reversing the job – Click on Save



3. If any credits are due to the customer, click on Yes to enter a credit. Otherwise, fill in why reversing and save



4. Fill in Reversal Date and Memo – Click on Save



6.5. Verify job is showing Reversed in the Jobs section in the customer tree