

Changing the Customer Site on a Job

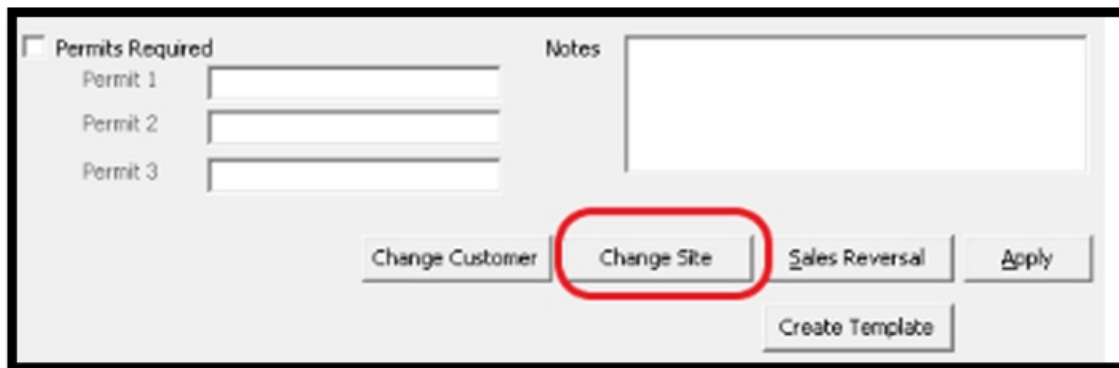
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Description of Issue:

We accidentally chose the wrong site on the job. How do we update the job site?

Fixes:

If there are no tasks approved that lock or invoice the job, you should be able to update the site by going into the Work Order Entry screen of the Job and clicking on the Change Site button. If any tasks have been approved, they will need to be unapproved. This should allow for the Change Site button to be available.

A screenshot of a software interface for job management. On the left, there is a section titled 'Permits Required' with a checkbox and three input fields labeled 'Permit 1', 'Permit 2', and 'Permit 3'. To the right of this is a 'Notes' text area. At the bottom of the interface, there are several buttons: 'Change Customer', 'Change Site', 'Sales Reversal', 'Apply', and 'Create Template'. The 'Change Site' button is highlighted with a red oval.

If the Change

Site button is missing, then there may be a task approved that has locked or invoiced the job. If this is the case, you should be able to unapprove non-invoice tasks and change the site. If the job has been invoiced, or something Site Specific, such as RMR, has been added to the job, or if the job has been closed, then the Job Site cannot be changed. Re-opening a closed Job will not bring the Change Site button back.