

Job Management – Change Customer

02/09/2024 6:14 pm EST

If the incorrect Customer was selected when creating a Job this may be corrected if the Job has not been invoiced.

Job Management

Open the Job and select the “Work Order” tab on the left Job Panel.

At the bottom of the Word Order Screen select “Change Customer”

Job - 5131-2 (Pool House)

Job	Customer 49954	Site
Job Number 5131-2	Kelley Ainsworth	Pool House
Job Type CCTV-Res	2525 Ascroft Court	4567 Blue Lagoon Drive
Job Status Parts	Baton Rouge, LA 70816	Baton Rouge, LA 70816
System 49954 CCTV		
Labor Units 0. (0. Used)		

Work Order Entry

Job Information

Created 9/4/2023

Prevailing Wage 0.00

Project Manager

Salesperson Amy Bartimus

P.O. Number WeSuite PO#123

Sold Date 9/4/2023

Projected Start

Projected End

Job Number 5131-2

Job Type CCTV-Res

Description Kelley Ainsworth - Pool Cabana

Tax Group NC - State Tax

Branch MI

HoldBack % 0

Install Company MI

Installer

Permits Required

Permit 1

Permit 2

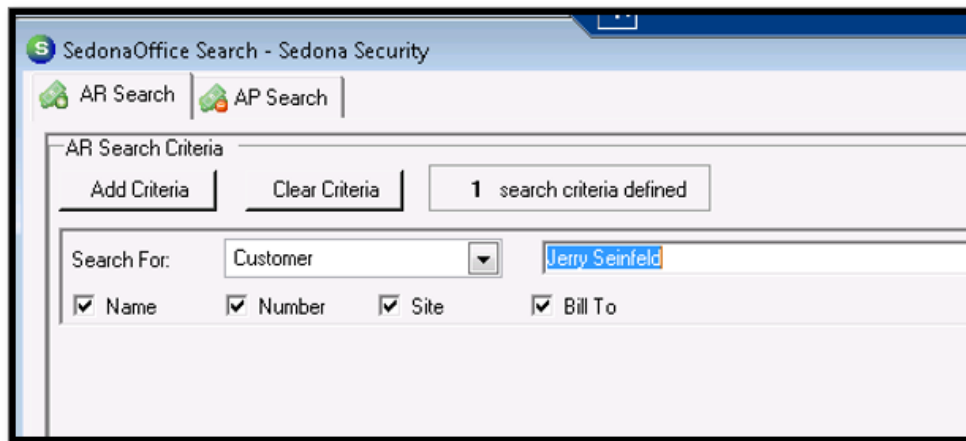
Permit 3

Notes

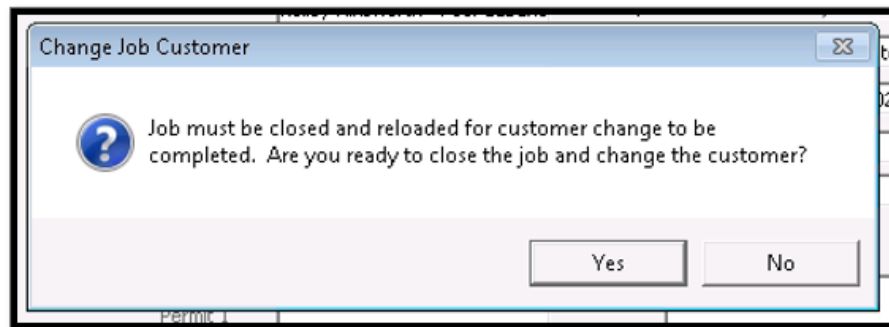
Change Customer Change Site Sales Reversal Apply

Create Template

The Customer Search will open, and you can select the Correct Customer for the Job.



Once the Correct Customer is selected a “Change Job Customer” screen will open asking you to confirm the change.



The Job will then close and reload with the Correct Customer.