

Job Management – Change Site

02/09/2024 6:14 pm EST

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

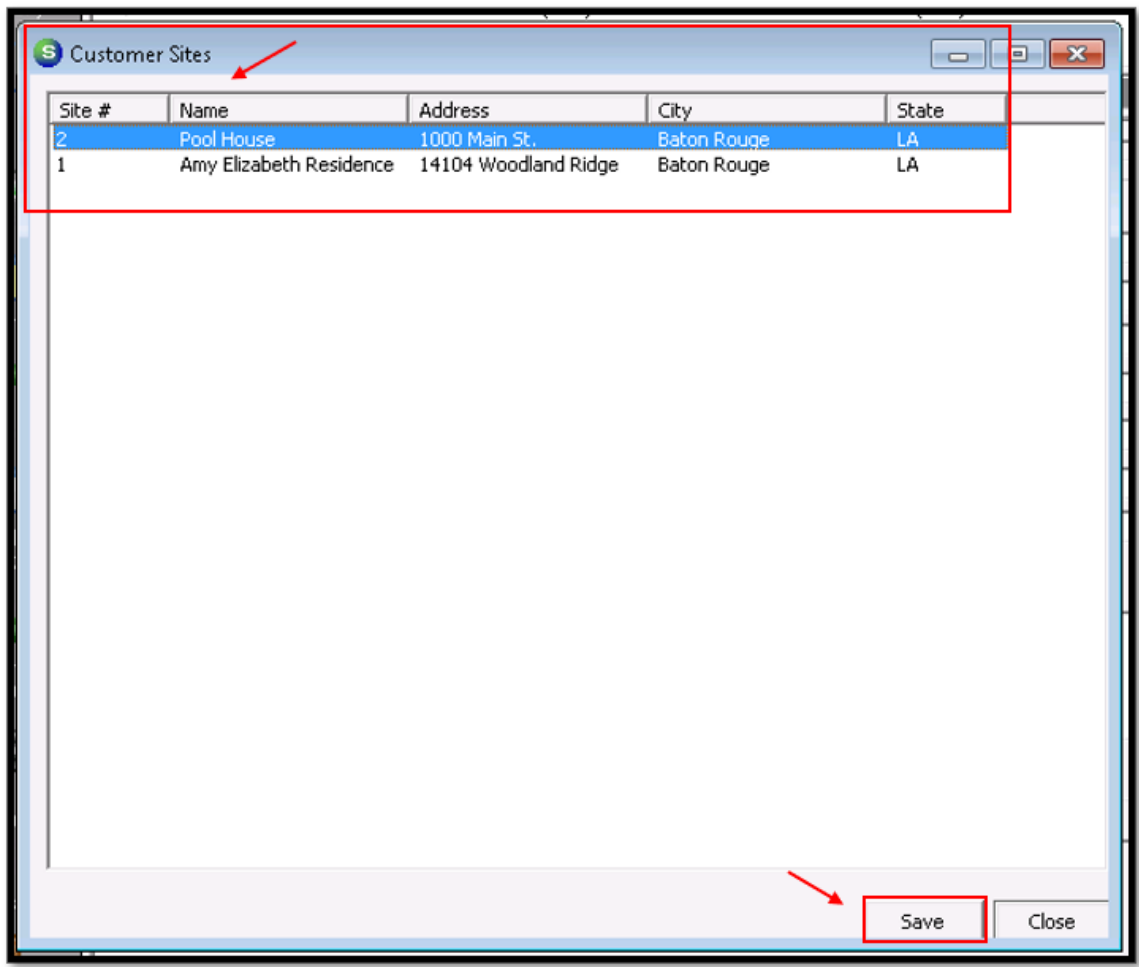
Job Management

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

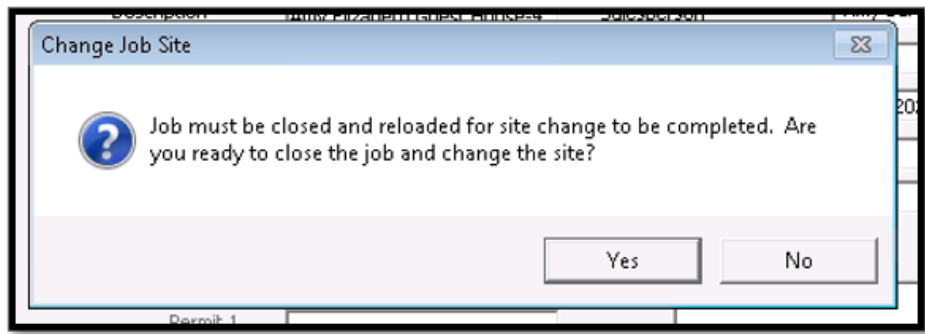
At the bottom of the Word Order Screen select “Change Site”

The screenshot displays the 'Job Management' software interface for a job titled 'Job - 5131-2 (Pool House)'. The interface is divided into a left sidebar and a main content area. The sidebar contains several menu items: 'Sales Summary', 'Work Order' (highlighted with a red box), 'Job System', 'Bill To', 'Tasks', 'Installs \$1,515.49', 'Recurring \$0.00', 'Materials \$0.00', and 'Job Costing'. The main content area is titled 'Work Order Entry' and contains a 'Job Information' section. This section includes fields for '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), and 'Installer'. It also includes fields for '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', and 'Projected End'. There are also checkboxes for 'Permits Required' and a 'Notes' field. At the bottom of the 'Job Information' section, there are four buttons: 'Change Customer', 'Change Site' (highlighted with a red box), 'Sales Reversal', and 'Apply'. A red arrow points from the 'Change Site' button in the sidebar to the 'Change Site' button in the main content area.

The Customer Site Search will open, and you can select the Correct Site linked to that Customer.



Once the Correct Site is selected a "Change Job Site" screen will open asking you to confirm the change.



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