

How To Update a Job if it is Locked

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Issue:

The customer needs to make some changes to a job but it is locked.

Resolution:

The first thing to address is how was the job locked. There are several different ways that a job can be locked and some of them cannot be unlocked so updating the job will need to be handled in different ways depending on how the job is locked.

The ways a job can be locked are:

- Locked by a task
- Locked by a task that has been invoiced
- Locked by job closure

Addressing Job Locked by a Task:

If a job has been locked by a task, you can tell this by looking at the tasks tab in the Job.

See the below image. The highlighted task has been locked.

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The lock is indicated by the Y in the column with the padlock icon, which indicates that the task locks the job.

The task can be unlocked by right-clicking on the task and clicking on the Unapprove Task option.

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Unapproving the Task will unlock the job and any necessary changes can be made to the job.

Note: Unapproving tasks are decided by permissions. If you cannot unapprove a task then this permission will need to be granted or someone with the permissions to do so will need to unapprove it.

Addressing Job Locked by a task that has been invoiced:

Note: This is not a true lock as changes can still be made to the job.

You can see if an invoice is associated with a task by viewing the Invoice column and if any of the tasks have an invoice number in them.

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If an attempt is made to un-approve the task a message will appear indicating that the task has been billed and cannot be un-approved.

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Changes can still be made to the job, but not to any of the items that were included in the invoice. You can Credit Off the job invoice by going to Tools > Invoicing in the job. Right-click on the Invoice and select Credit Off Job Invoice. You can then edit and re-invoice the job for a new amount.

Addressing a Job that is locked by job closure:

If a job has been closed and changes need to be made and the decision has been made to re-open the job, regardless of its lock status or if it was invoiced before it was closed, the only changes that can be made to the job will need to be done by Change Order.

If a job is still open and Change Orders have been added:

This has likely happened because the job was locked by a task and instead of the task being unapproved due to permissions or lack of proficiency with the process, a user created a change order to address a change that was needed. However, once a change order is added to a job, you will not be able to unlock tasks.
