

How to Delete a Job

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.

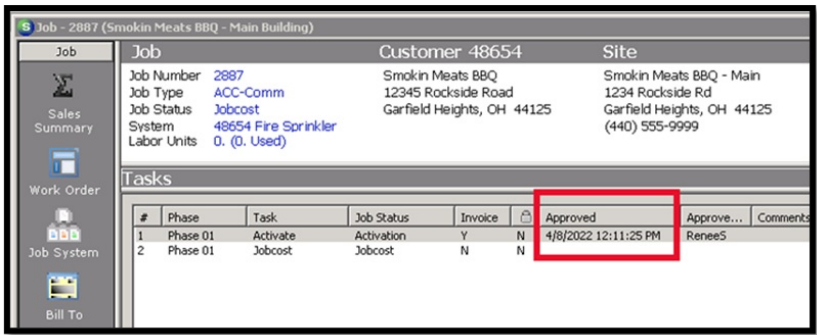
Overview

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

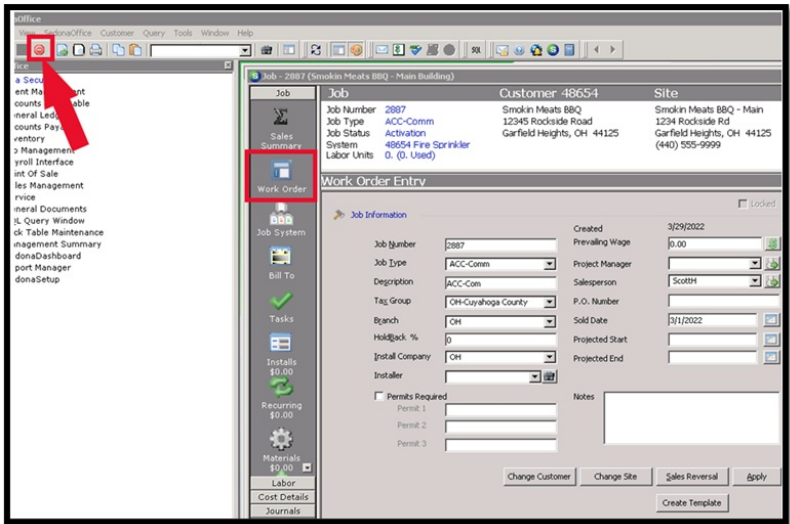
Steps:

Deleting a Job:

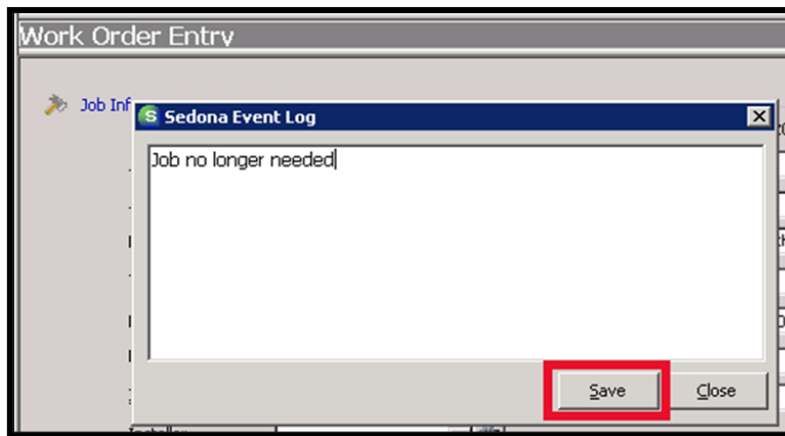
1. Make sure there are no Tasks that have been approved by going into the Tasks Tab. If there are approved tasks, unapprove them and save.



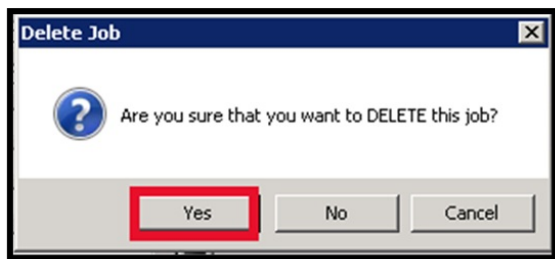
2. Then Click on the Work Order Entry - The Red Delete button in the task bar, should be available - Click on it



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.

Summary System 340 Integrated Canton, MI 48187 (555) 555-5555 x55555
Labor Units 0.5 (3.05 Used) (517) 414-4985

Work Order Entry

☒ Locked

Job Information

Job Number: 1065 Created: 8/25/2015
 Job Type: ACC-Com - Inv by % Prevailing Wage: 0.00
 Description: Access - Large Commercial Project Manager: Sean Wyman
 Tag Group: MI-Wayne County Salesperson: Sean Wyman
 Branch: MI P.O. Number:
 Holdback %: 10 Sold Date: 8/25/2015
 Install Company: MI Projected Start:
 Installer: Projected End:
☐ Permits Required
 Permit 1:
 Permit 2:
 Permit 3:
 Notes:

Then click on Sales Reversal Button

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

Sedona Event Log

Job not longer needed. Customer changed mind.

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

SedonaOffice

This job is partially billed. Credits May Need to be created. Do you wish to continue?

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

Job Reversal

Reversal Date: 9/14/2023
 Memo: Customer no longer wants system

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

1065	dfsdfsdfsdfs	Access - Large Commercial	8/25/2015	ACC-Com - Inv by %	Reversed
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