How To Correct an Invoiced Job to Remove a Part

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Situation:

User has invoiced the whole job. Afterwards, they realized that a part should have been removed from the job prior to invoicing and now need to correct the issue.

Proposed Resolution:

- Open the invoice. If there is an advanced deposit applied to the invoice, un-apply it.
- Credit off the invoice from within the job by going to Tools > Invoicing. Find the invoice. Right click. Credit off the invoice or make Credit Request.
- After the invoice has been credited, make the necessary changes to parts or inventory if needed, in this case, parts need to be removed.
- Lock job with task, either by approving the last task or mark locked box on the current task.
- Create Reverse Change Order for Materials.
- In the Change Order, mark how many you would like to remove from the job. Apply the change to save.
- Go to Inventory > Issues/Returns.
- Create a return for the job and return the part by marking the Return to Stock button.
- Back in the Job, go to Tasks.
- Either create a new task or use the next task if the one before was locked.
- Make sure the Invoice box is marked on the task.
- Invoice the job from the task.
- Once saved. Apply the change.
- Go to Job Management > Job List queue > Ready to Invoice
- Find the Job in the Ready to invoice list.
- Click Invoice button.
- Apply the Advance Deposit to the Job Invoice. Save.