

Project - Deleting a Project Created from an Opportunity

02/28/2025 10:31 am EST

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Purpose

[Update the linked Opportunity](#)

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On occasion, a project is created from an opportunity using the wrong template. PMO resources do not have the ability to delete these projects from the project itself. This document walks through the proper steps to delete and unlink the project from the Opportunity allowing a new project to be created.

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Update the Opportunity

Follow the steps below to delete the project from the Opportunity and allow a new project to be created:

1. Open the opportunity
2. Locate the Related List Link section showing the number of related projects and open the project list view by clicking on the TaskRay Projects link
3. □
4. Delete the project from the list
 1. Locate the project line in the list
 2. Click the drop down arrow at far left and select delete
 1. This unlinks the project from the opportunity and deletes the project
5. The new project can now be created
 1. From the Description section of the project, locate the Implementation Project Template field
 2. Remove the existing template
 3. □
 4. Select the correct template and save
 5. A new project will be created using the correct template

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