

Closing or Cancel Job

Closing a Job

Job Costing > Activity > Manage Job

A job is automatically closed upon issuing a final invoice. However, if invoicing is complete and the job remains open due to outstanding purchase orders or quotes, it can be manually closed as needed.

- **Close** all the open documents (Quotes, PO, Delivery Notes)
- **Highlight** the job line you want to close
- Click "**Functions**" dropdown at the top left of the screen
- Click "**Close or Cancel Job**"

The screenshot shows the 'Job Costing Module' interface. On the left is a sidebar with 'Configuration' and 'Activity' sections. The main area is titled 'Job Search' and contains search filters and a table of job lines. The 'Functions' dropdown menu is open, highlighting 'Close or Cancel Job'. The job list table has columns for job number, memo, due date, job status, team, info, WIP O/S, % completed, completion date, delivery date, start date, approved date, and job number. Job line 2 is highlighted in orange.

#	Att	Memo	Due	Job Status	Team	Info	WIP O/S	% Completed	Completion Date	Delivery Date	Start Date	Approved Date	Job No
1			7						2025-11-07	2025-11-07	2025-11-05	2025-11-04	JOB1069
2			7						2025-11-06	2025-11-06	2025-10-30	2025-10-30	JOB1068
3			6						2025-10-16	2025-10-16	2025-10-09	2025-10-09	JOB1067
4									2025-06-10	2025-06-17	2025-06-10	2025-06-10	JOB1066
5									2025-05-05	2025-05-12	2025-05-05	2025-05-05	JOB1065
6									2025-05-02	2025-05-09	2025-05-02	2025-05-02	JOB1061
7									2025-05-02	2025-05-09	2025-05-02	2025-05-02	JOB1062
8									2025-05-02	2025-05-09	2025-05-02	2025-05-02	JOB1063
9									2025-05-09	2025-05-09	2025-05-02	2025-05-02	JOB1064
10									2025-04-07	2025-04-07	2025-03-31	2025-03-31	JOB1060
11							2		2025-02-20	2025-02-20	2025-02-13	2025-02-13	JOB1059
12									2024-12-20	2024-12-25	2024-12-03	2024-12-03	JOB1058

This screen is used to close a job. You select how it's being closed, confirm it, and then click OK. The job and customer details are already filled in automatically.

Job Closing

Job No: JOB5312

Customer: ACE Traders

Details:

Close Type: Stock write off

Type Of Close: ☒ Close Job ☐ Cancel Job ☐ Completed

Linked Job: ☐

☒ CTC (Cost to Company) ☐ SC (Scope Creep)

Item:

Description: Copy

Total Cost: 0 Total Selling: 0

Confirm Close: ☐

OK Show O/S Docs Cancel

Auto-populated information

These details are pulled through from the job:

- **Job No** – Displays the job being closed (e.g. JOB5312)
- **Customer** – Shows the customer linked to the job
- **Details** – Additional job information (if applicable)

Closing setup

Close Type

- Used to select how the job is being closed financially or operationally
- Example shown: **Stock write off**

Type of Close

Choose one of the following options:

- **Close Job** → Standard closing of the job

- **Cancel Job** → Use if the job is no longer going ahead
- **Completed** → Confirms the job has been fully finished

Linked Job (optional)

- Allows you to link this job to another if required
- Options like:
 - **CTC (Cost to Company)**
 - **SC (Scope Creep)**
- Additional fields (Item, Description, Cost, Selling) will activate if used

Confirm Close

- **Confirm Close (checkbox)**
☐ Must be ticked to finalise the job closure

Actions

- **OK** → Completes the job closing process
- **Show O/S Docs** → Displays any outstanding documents (must usually be resolved before closing)
- **Cancel** → Exits without closing the job

Revision #4

Created 12 June 2026 04:58:01 by Pamela

Updated 15 June 2026 01:42:00 by Pamela