

Clean up your Job Files on a Regular Basis

Don't wait until you are ready to Close the Books for the year to do a little housekeeping. Because the size of hard drives has increased phenomenally over the years, we no longer recommend deleting jobs but you can still tidy things up.

1. Verify the status of Jobs. You can change the status of Jobs to Complete or Closed quite easily by going to screen 3-5. Select Update> Select Completed Status or Closed Status > Double-click Job Names to select (selected items will turn orange) > Click on Check Mark. The status of all selected Jobs will be changed to your selection.

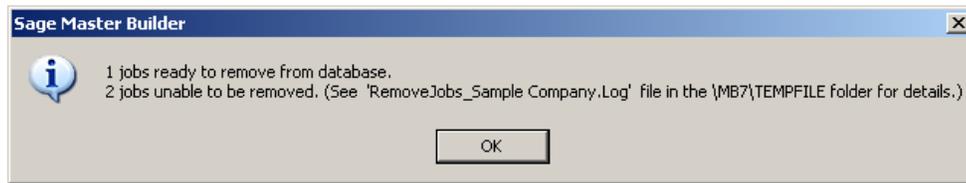
The screenshot displays the Sage Master Builder interface for '3-5 Jobs (Accounts Receivable)'. The 'Update' menu is open, showing options: 'Recalculate Retention', 'Release Payable Retention', 'Completed Status', and 'Closed Status'. A 'Sage Master Builder' dialog box with a warning icon states: 'To update jobs to a 'Closed' status: Select the jobs from the window list and click the picklist button.' Below this, a job list window is visible with a status picklist on the left (options: All Statuses, Bid, Refused, Contract, Current, Complete, Closed) and a table of jobs on the right. Job 223 'Main Street' is selected and highlighted in red. A second 'Sage Master Builder' dialog box with a warning icon says 'Update complete.' and has an 'OK' button.

Job#	Job Name
1	Historical Job Costs
186	Williams Post Office
201	Trappen Motel
207	Wood Elementary School
215	Jimenez Bur
216	Jimenez Bur
220	Lamb Shoes
221	Bike Path fo
222	Big Redwoo
223	Main Street
224	Walking Sho

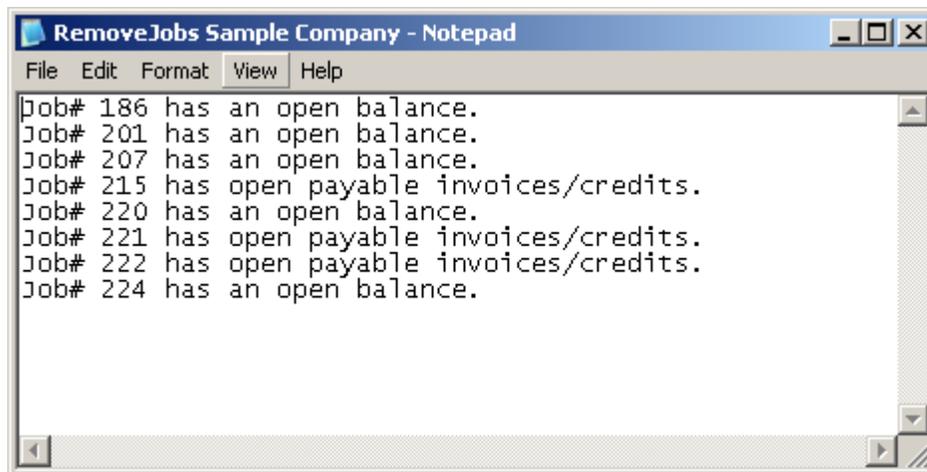
2. Find out which Jobs have Open Items. Go to 1-6 Audit and Close Books. Select Options > Verify Job Removal.

The screenshot shows the '1-6 Audit/Close Books' window. The 'Options' menu is open, highlighting 'Verify Job Removal'. A yellow text box contains the following instructions: 'Perform a complete audit and advance to the next accounting period; choose "Audit Only" to perform the same audit without changing the period. (Some variances can be automatically corrected with "Repair".)'. At the bottom, there are buttons for 'Audit Only', 'Repair', 'Close Books', 'Cancel', and 'Exit'.

You will get a message that tells you how many jobs can be removed and how many have issues. The message will also point you to the Log File that was created in the process. This process WILL NOT remove any data from your company.



3. Locate the LOG FILE file through Windows Explorer. You will find it under \MB7\TEMPFILE. It will be called RemoveJobs Your Company.Log. Open it by Right Clicking on the file and selecting "Open With", choose Notepad. Print this file.



4. You now have all the clues you need to clean up your Jobs.