

Delete Job Client Categories User Guide

Introduction

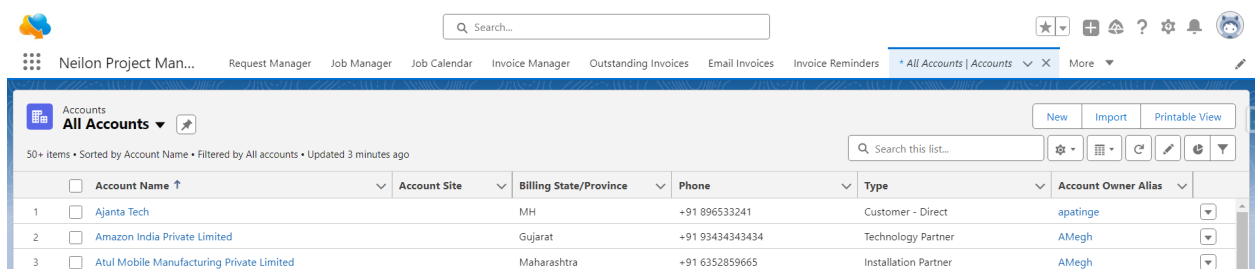
We have a feature in which you can delete the customer's job client categories provided by the customer

Functionality Overview

Delete Client Categories

Follow the below steps to delete job client categories

1. Go to the **Account** tab
2. Find the customer account record for which you have to add client categories



	Account Name ↑	Account Site	Billing State/Province	Phone	Type	Account Owner Alias
1	Ajanta Tech		MH	+91 896533241	Customer - Direct	apatinge
2	Amazon India Private Limited		Gujarat	+91 9343434343	Technology Partner	AMegh
3	Atul Mobile Manufacturing Private Limited		Maharashtra	+91 6352859665	Installation Partner	AMegh

3. Open the customer account record details
4. Go to the **Related** section
5. Here you can see a few client categories already created for this customer account Snapdeal Fashion Pvt Ltd

Neilon Project Man... Neilon Jobs Administration Request Manager Job Manager Job Calendar Invoice Manager Outstanding Invoices Email Invoices * Snapdeal Fashion Pvt Ltd | ... X * More

Account
Snapdeal Fashion Pvt Ltd

Edit Change Owner Delete

Related Details Approved Inspectors

We found no potential duplicates of this Account.
No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

Company Flags (0) [New](#)

Job Client Categories (4) [New](#)

Job Client Category Name	Data Type	Dropdown Values	Sort Number
Registration Date	Date		1.00
Product Name	Text		2.00
Company Type	Picklist	Pvt Ltd, LLP, LLC	3.00
Total Employee	Number		4.00

Activity

Filters: All time • All activities • All types

[Refresh](#) • [Expand All](#) • [View All](#)

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

- Click on the Job Client Category Name to open its details which you want to delete

Job Client Category
Company Type

Edit Clone Delete

Details

Job Client Category Name
Company Type

Client
[Snapdeal Fashion Pvt Ltd](#)

Client Category Number
3.00

Data Type
Picklist

Dropdown Values
Pvt Ltd, LLP, LLC

Applicable
☒

Sort Number
3.00

Created By
 [Abhishek Patinge](#), 15/04/2024, 9:54 am

Last Modified By
 [Neilon Admin](#), 15/05/2024, 7:00 pm

Delete Client Category

This client category is already being used by below jobs.

Job#	Category Value
NEILON-JOB-106	Pvt Ltd

[Delete](#)

- Here you can see it shows a list of jobs in which this client category is being used. Also, it shows the set value of this client category for respected jobs
- Click on the **Delete** button



Delete Client Category

This client category is already being used by below jobs.

Job#	Category Value
NEILON-JOB-106	Pvt Ltd
Delete	

- The client category is deleted successfully. Now, refresh the page
- Here you will see the message that the client category is deleted.



Delete Client Category

This client category is already deleted. This client category is already being used by below jobs.

Job#	Category Value
NEILON-JOB-106	Pvt Ltd