

Overview

Once a work order has been posted, it cannot be edited or un-posted. However, it is sometimes necessary to make corrections to a work order that has already been posted. This method of correcting posted work will provide a clear paper trail that accomplishes three things:

- Preserves the original work record.
- Negates the incorrect information.
- Provides the correct information.

To negate the incorrectly posted work:

- 1. Open the posted work record for which you would like to make changes.
- 2. Click the **Duplicate Work** button in the operations menu at the top of the work record, as shown below:



3. In the resulting pop-up box labeled "Duplicate Work," make sure to check all boxes except for "Duplicate Time Records" and "Dependent," as shown below. This will create a new, editable record with the information from the old record already in place.

Work 💾 🖉) 🖷									
Number:	2290		010ST			Poster	ł			1
Customers:			=	Work Ca	ategory:	TXT		≡	Text Message	
Work Person								=	Open	
Phone:		Duplica	te Work				D13		14:14	
Property:	10 STATE		Duplicate Work	Related Records			2012	#	09:43 🕓	
Unit:	10 STATE-		Duplicate Work	Amounts Records				#	C	
Floor:	G		Duplicate Time	Records					C	
Room:			Duplicate Work	Materials Records				#	C	
Department:			Duplicate Work	Vendors Records				#	C	
Work Type:	LIGHTS		Duplicate Work	Readings Records				#	C	
Priority:	2-HIGH		Duplicate Work	< Tasks Records						
Vendor 🔽	ELECTRIC		Dunlicate Remi	inder Records						
Description:	Replace Lig		Duplicate Time	stamn Detail Records						
			Include Pelater	Pecord						
		Number		=						
		Number.	Dependent	=						
			Dependent							
kale Cancel Ad										
Start Date Cont	act W	ork Type	Start Tim End Tir	me Time Type To	tal Time	Hourly C	har Hou	rly Cost To	tal Charge T	otal C
					0.00	0 0.0	500	0.0000	.00.00	_
									Available Re	cords: 26



- 4. Go through the work record. Under each of the following tabs, negate all costs and charges.
 - Additional Amounts: place a minus sign (-) in front of all Charge and Cost amounts. You will not need to worry about zero dollar amounts.
 - Time: place a minus sign in front of either the Total Time or Hourly Charge/Cost for each line.
 - Materials: place a minus sign in front of the Quantity in each line.
 - **Vendors**: place a minus sign in front of all **Charge** and **Cost** amounts. You will not need to worry about zero dollar amounts.

Note: In order to check that all amounts have been negated, save the new work record and add the **Total Charge** and **Total Cost** columns to the List View. Compare the numbers in these columns for each work record. If the Total Cost/Charge in the original record reads \$0.00, the new record should also read \$0.00. If the Total Cost/Charge column displays a number, the new record's number should be negative the old record's number (i.e. **\$454.98** on the old record should become **-\$454.98** on the new record).

Custom Fields	Related Total Amount	s Additional Amounts 1	Time Materials	Vendors	Readings Tas
Account	Description		Charge	Cost	¢0.00
			200	J.UU	\$0.00
Custom Fields	Related Total Amounts	s Additional Amounts	Time Materials	Vendors	Readings T

Description	Charge	Cost
	-2500.00	\$0.00
	Description	Description Charge -2500.00

5. Once you are certain the charges match, set the work status for the new record to CLOSED, and save it.

To make corrections:

- 1. Open the original record and **Duplicate Work** again. You will use the same settings used the first time the record was duplicated.
- 2. In the new record, make all necessary corrections to the information.
- 3. Carefully double check the work record for any errors or missing information, then set the work status to **CLOSED**. Save the record.
- 4. Post both of the newly-created records as you normally would, but do not export the batch file.



To generate and export the corrected batch file:

- 1. From the console, go to the **Financial** tab and right-click **Transactions**. Choose **Open by Search**.
- 2. Search for records by **Date Posted** to pull up the transactions list. This should be the list you would normally export.

	×						
Work Trans. Search							
Keywords: ⊙ Range: ⊕	Date Posted 💟 May 2, 2013 📾 to May 2, 2013 📾 🕢						
Sort: Subsort:	Amount Descending None						
	Search Cancel Clear						

3. In this list, you will need to find the transactions for the incorrect work record and its negative. Once you have found them, hide them from the list.

Work List 💧 🗎 🕂 🗈 🖍 📾 🔭 🐺 🖉 🔍 🗟 🏵 🖽 🔮 🗮 🛛 Operations 🖯						
Number	Assigned To 🧳	Hide 🖉	Work Type 🏒	Work Status 🛛 🖌	Total Charge	
1957	DECK-HALLS	Electrical - re-wiring of directory	ELEC	CLOSED	\$3,750.00	
1956	ELECTRICS	Replace Lights in the lobby	LIGHTS	CLOSED	\$2,500.00	
2291	ELECTRICS	Replace Lights in the lobby	LIGHTS	CLOSED	\$2,300.00	
2292	ELECTRICS	Replace Lights in the lobby	LIGHTS	CLOSED	\$-2,500.00	
1954	BOBSNOW	Snow removal for winter of 2012	SNOW	CLOSED	\$10,000.00	
1955	BOBSNOW	Snow removal for winter of 2012	SNOW	CLOSED	\$5,000.00	
1829	MGR.PROP	The following email could not be parsed due to errors in the	OTHER	CLOSED	\$0.00	
1841		The following email could not be parsed due to errors in the	OTHER	CLOSED	\$0.00	
				-		

- 4. Now you have a complete set of transactions for the posted work, including the correct transaction information for your corrected work record.
- 5. Export the file as usual.