

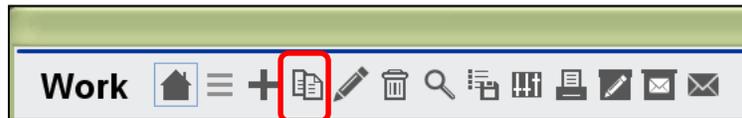
Overview

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:

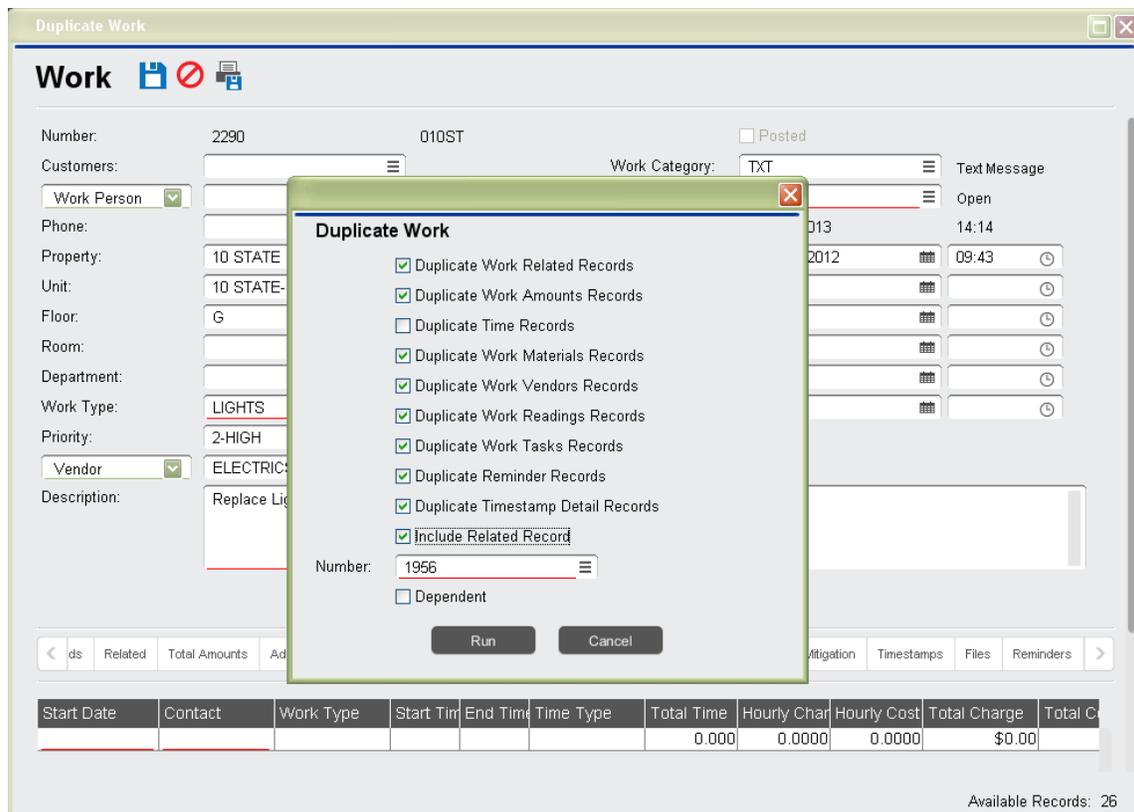
- Preserves the original work record.
- Negates the incorrect information.
- Provides the correct information.

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.



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 Amounts Additional Amounts Time Materials Vendors Readings Tas			
Account	Description	Charge	Cost
		2500.00	\$0.00

< Custom Fields Related Total Amounts Additional Amounts Time Materials Vendors Readings T			
Account	Description	Charge	Cost
		-2500.00	\$0.00

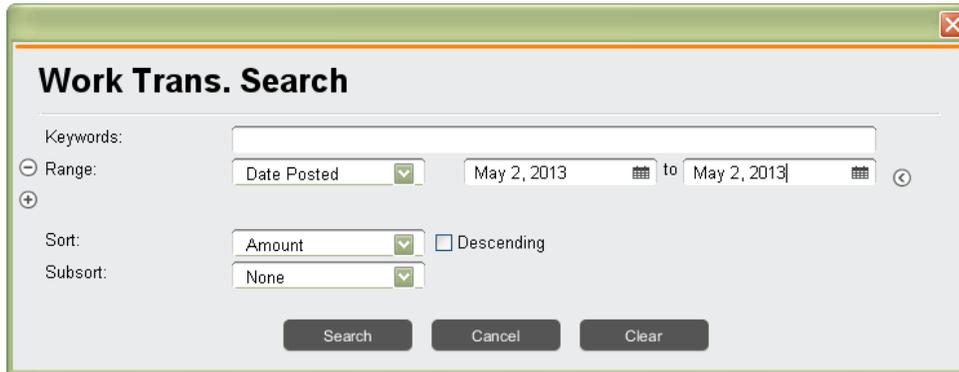
5. Once you are certain the charges match, set the work status for the new record to CLOSED, and save it.

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.



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.

The screenshot shows a "Work List" table with a toolbar at the top. The table has the following data:

Number	Assigned To	Description	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.