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# Change cost centre and adjust segment transactions

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If you are needing to change the cost centre of a segment due to an error message when invoicing, you will need to do an adjustment on all the segment transactions for the new cost centre to pull through.

If the segment is in a **Finished** state, you will need to reopen it to be able to change the cost centre.

1. Click on the **Manage** tab at the top
2. Click on **view/change cost centre/warehouse** button

Service segments (1 - ggnz) - Segment id: SC249235-02, Finished, Call number: SC249235

**Manage** | Warranty | Parts and Labour | Related information

Update SMU | Add segment notes | Hour meter replacement | Apply Service Letter | Open follow up notes | Check credit limit | Service scheduler Scheduler

Segment copy Segment... | Service segment split Split | Flat rate Flat rate | Get flat rate price Flat rate | Service reports Service... | Change segment customer | Equipment change | **View/Change Cost Center/...** | Reprice segment | Apply Contract | Cancel service letter | Create follow up notes | Permanent notes | Functions

Segment id	Report	Quoted	Credited	Split	Seq#	Job code	Component	Description	Modifier code	Shop/Field	Status	Credit status	Serial number	Standard job	Invoice account	Warranty type	Last day of labour	Need by date	Invoice i
SC249235-01	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	01	557	7502	Supply Parts - PM 2		Field	Finished	Approved	GTU01101		5000912			21/07/2021	
SC249235-03	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	03	540	7502	Perform - PM 2 GTU00001-GTY99999		Field	Finished	Approved	GTU01101	SJ0027588	3013494		4/09/2021	16/08/2021	
SC249235-02	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	056	9011	Travel To/From - Customer Site		Field	Finished	Approved	GTU01101	SJTRAVEL	3013494		4/09/2021	16/08/2021	

Segment details

- Items
- Hours
- Misc. Items
- Misc. Costs

3. Change the cost centre

Service segments (1 - ggnz) - Segment id: SC249235-02, In-process, Call number:

File Service segments Manage Warranty Parts and Labour Related information

Segment copy Service segment split Flat rate Get flat rate price Service reports Change segment customer Equipment change View/Change Cost Center/... Add segment notes Hour meter replacement Apply Service Letter Open follow Add correction text Apply Contract Cancel service letter Apply follow Reprice segment Remove contract Create follow up notes Permanent Functions

Segment id	Report	Quoted	Credited	Split	Seq#	Job code	Component	Description	Modifier code	Shop/Field	Status	Credit status	Serial number	Stanc
SC249235-01					01	557	7502	Supply Parts - PM 2		Field	Finished	Approved	GTY01101	
SC249235-03					03	540	7502	Perform - PM 2 GTY00001-GTY99999		Field	Finished	Approved	GTY01101	SI002
SC249235-02					99	056	9011	Travel To/From - Customer Site		Field	In-proc...	Approved	GTY01101	SI002

View/Change Cost Center/Warehouse (1 - ggnz) - Segment id: SC249235-02

Segment id	Job code	Service component	Operating unit	Warehouse
SC249235-02	056	9011	1002	19A

OK Cancel

Segment details  
Items  
Hours  
Misc. Items  
Misc. Costs

- Select the **Related information** tab at the top
- Click on **Segment transactions**

Service segments (1 - ggnz) - Segment id: SC249235-02, In-process, Call number: SC249235

File Service segments Manage Warranty Parts and Labour Related information

Sales order Purchase order Invoice proposals Call Invoice quotations Invoice journals Tool sales order Documents Service report Parts Return Document Jo... Service checklist SIS Serial CCS Detail TMI TEPS Authentication Create equipment workflow Show map by latitude/longitude Show map by address Create equipment ...

Segment transactions Hour Unposted hours Totals Warranty coverage Credit check log Inquiries Component structure

Segment id	Report	Quoted	Credited	Split	Seq#	Job code	Component	Description	Modifier code	Shop/Field	Status	Credit status	Serial number	Standard job	Invoice account	Warranty type	Last day of labour	Need by date	In
SC249235-01					01	557	7502	Supply Parts - PM 2		Field	Finished	Approved	GTY01101		5000912				21/07/2021
SC249235-03					03	540	7502	Perform - PM 2 GTY00001-GTY99999		Field	Finished	Approved	GTY01101	SI0027588	3013494			4/09/2021	16/08/2021
SC249235-02					99	056	9011	Travel To/From - Customer Site		Field	In-proc...	Approved	GTY01101	SI0027588	3013494			4/09/2021	16/08/2021

Segment details  
Items  
Hours  
Misc. Items  
Misc. Costs

- Make sure that the old and new cost centres are showing
- Click on **Transaction details** at the top

Segment transactions (1 - ggnz) - Segment id: SC249235-02, In-process

File Transaction details **5** Service report Service call closing sum...

Filter  
Include subprojects: ☒ Show adjustments: ☐

Overview **Financial dimensions** **1**

**Financial dimensions** ☒ Where the Contract dimension is used

Contract:		
CostCentre:	1002	EQU - Field Service <b>2</b>
Department:	ESV	Service
Division:	ESV	Service
Equipment:	EQ046832	DE150E0 Std

Overview **Financial dimensions** **3**

**Financial dimensions** ☒ Where the Contract dimension is used

**4**

Contract:		
CostCentre:	1004	EQU - Spec Shop
Department:	ESV	Service
Division:	ESV	Service
Equipment:	EQ046832	DE150E0 Std
Location:	19	Hamilton
ProductGroup:	PSGEN	PS Genset
ProductionID:		
ProjectID:	SC249235-02	Travel To/From - Customer Site
SalesPerson:	NA	Not Applicable

**New cost centre**

**Old cost centre**

## 8. Click on Functions > Adjust transactions

Hour transactions (1 - ggnz) - Project ID: SC249235-02, 4/09/2021, Transaction ID: PJT5449152

File Voucher Ledger up **1** **Functions** Inquiries Subledger journal

Column display: Display: Price Filter: Invoice status

Overview General Financial dimensions Cost

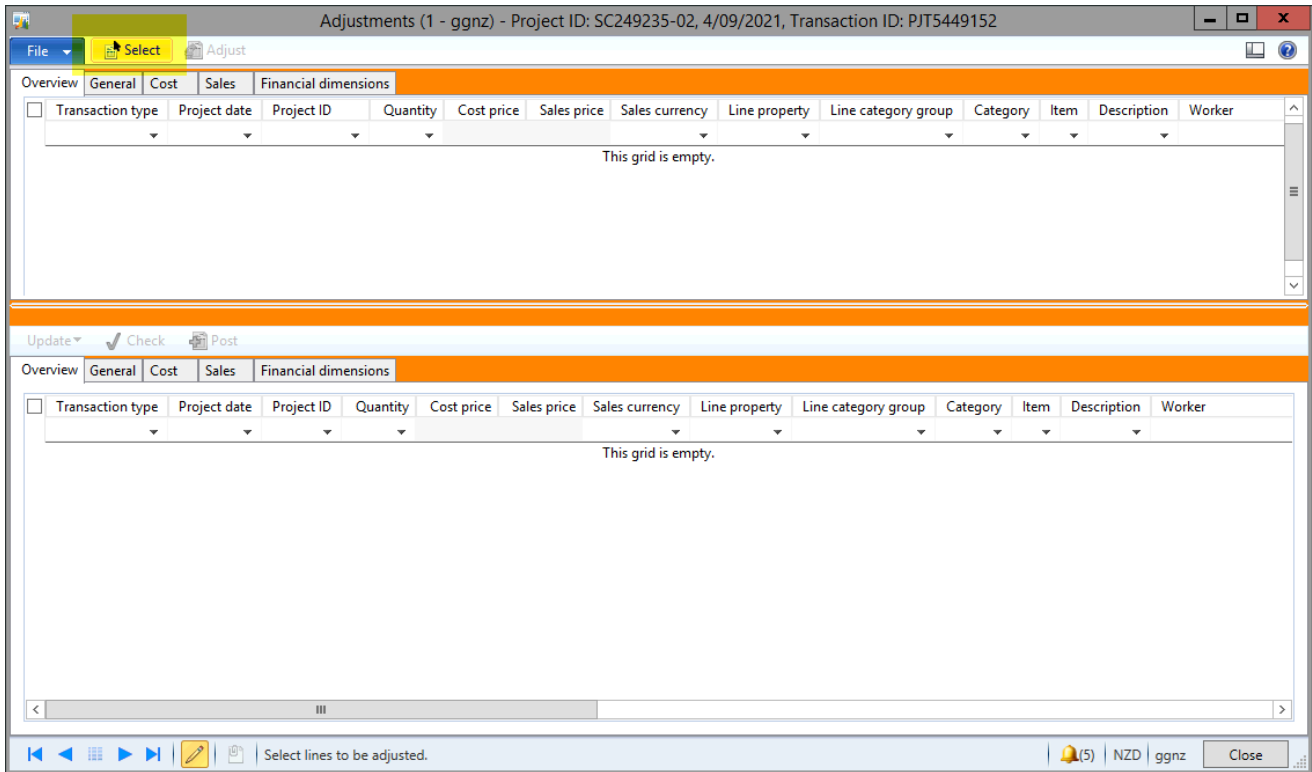
**Adjust transactions** **2**

- Post costs
- Accrue revenue
- Invoice proposals
- Select for credit adjustment note

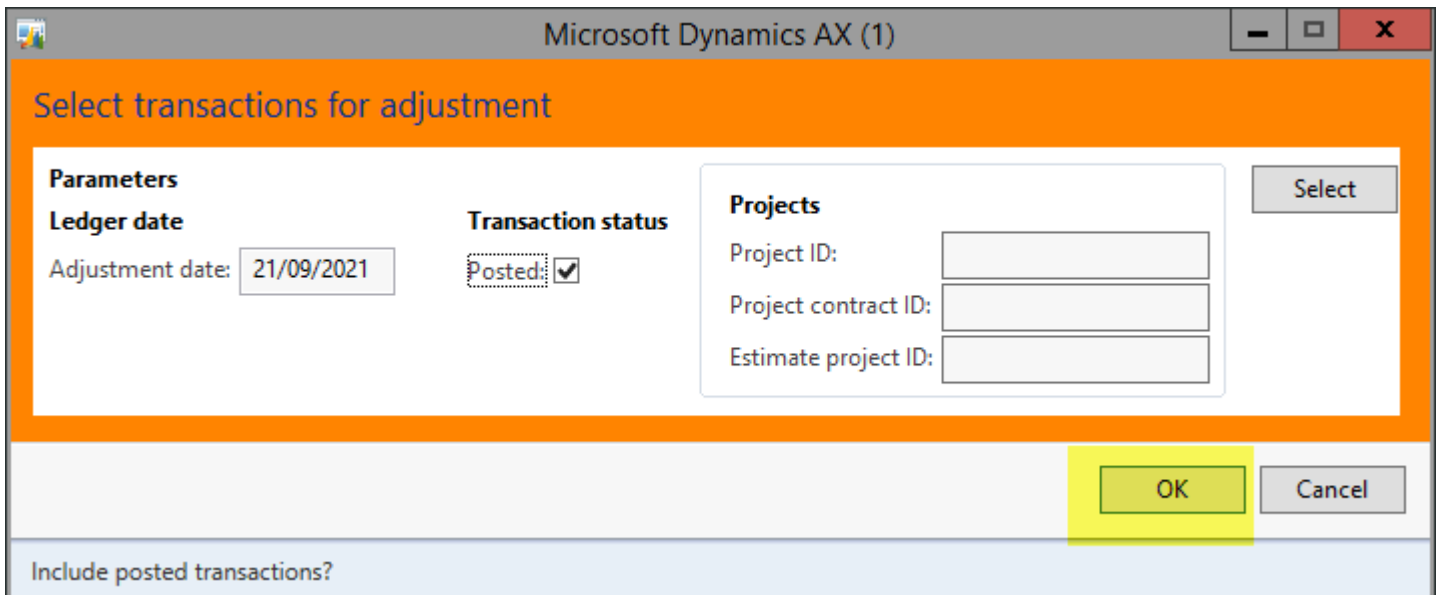
Project date	Project ID	Category		Hours	Cost price	Sales currency	Sales price	Line property	Line category group	Invoice status	Transaction origin
4/09/2021	SC249235-02	LBR-TVL-REV-TM	Roberto Barba	0.25	53.36	NZD	105.00	OC-SS	TRAVEL	Chargeable	Hour journal

Project transaction date | (5) NZD | ggnz | Close

9. Click on **Select** at the top



10. Click **OK**



11. Click on **Adjust**

Adjustments (1 - ggnz) - Project ID: SC249235-02, 4/09/2021, Transaction ID: PJT5449152

File Select Adjust

Overview General Cost Sales Financial dimensions

Transaction type	Project date	Project ID	Quantity	Cost price	Sales price	Sales currency	Line property	Line category group	Category	Item	Description	Worker
Hour	4/09/2021	SC249235-02	0.25	53.36	105.00	NZD	OC-SS	TRAVEL	LBR-TVL...			Roberto Barba

Update Check Post

Overview General Cost Sales Financial dimensions

This grid is empty.

Project that the transaction is attached to.

Close

12. No need to fill any of these in, just click **OK**

Microsoft Dynamics AX (1)

Adjust transactions

Specify new values for the selected transactions. If you adjust transactions for a project that has multiple funding sources, the funding rules are applied again.

Split in number of lines: 1

**New value for selected lines**

Project:

Activity number:

Category:

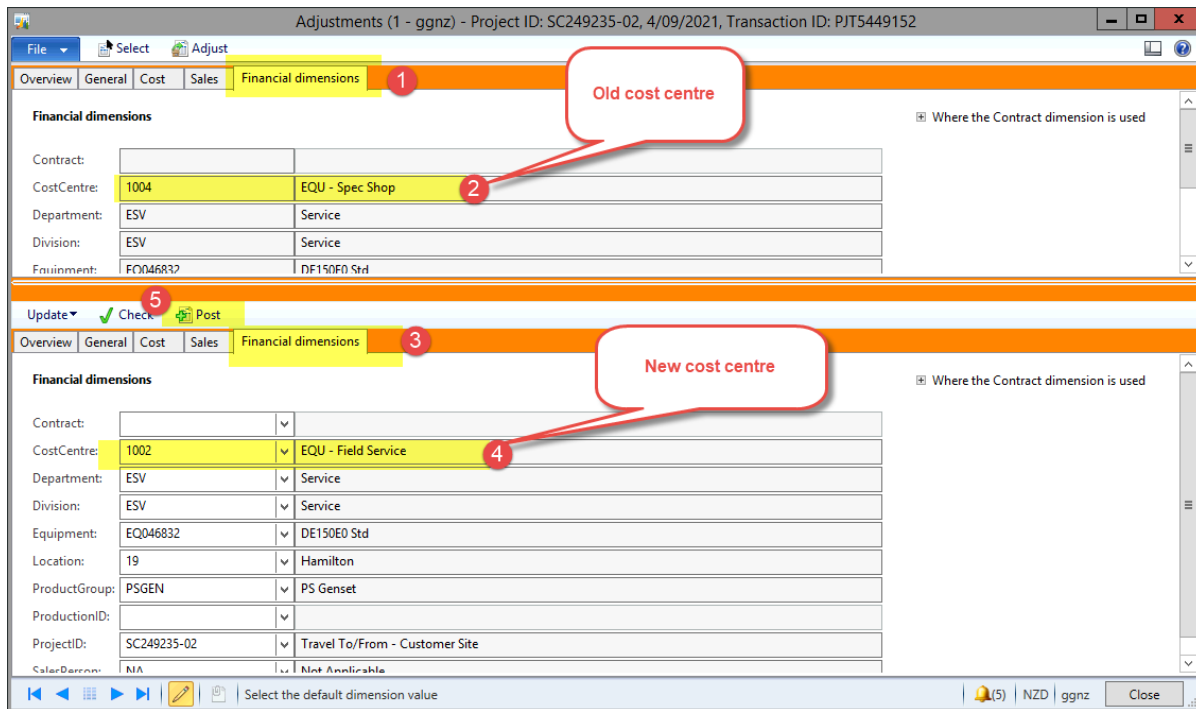
Line category group:

Line property:

OK Cancel

Split in number of lines

13. Again, make sure that both the old and new cost centres are showing, if they are then click **Post**



Adjustments (1 - ggnz) - Project ID: SC249235-02, 4/09/2021, Transaction ID: PJT5449152

File Select Adjust

Overview General Cost Sales Financial dimensions 1

**Financial dimensions**

Contract:

CostCentre: 1004 EQU - Spec Shop 2

Department: ESV Service

Division: ESV Service

Equipment: EQ046832 DE150E0 Std

Where the Contract dimension is used ☐

Update Check Post 5

Overview General Cost Sales Financial dimensions 3

**Financial dimensions**

Contract:

CostCentre: 1002 EQU - Field Service 4

Department: ESV Service

Division: ESV Service

Equipment: EQ046832 DE150E0 Std

Location: 19 Hamilton

ProductGroup: PSGEN PS Genset

ProductionID:

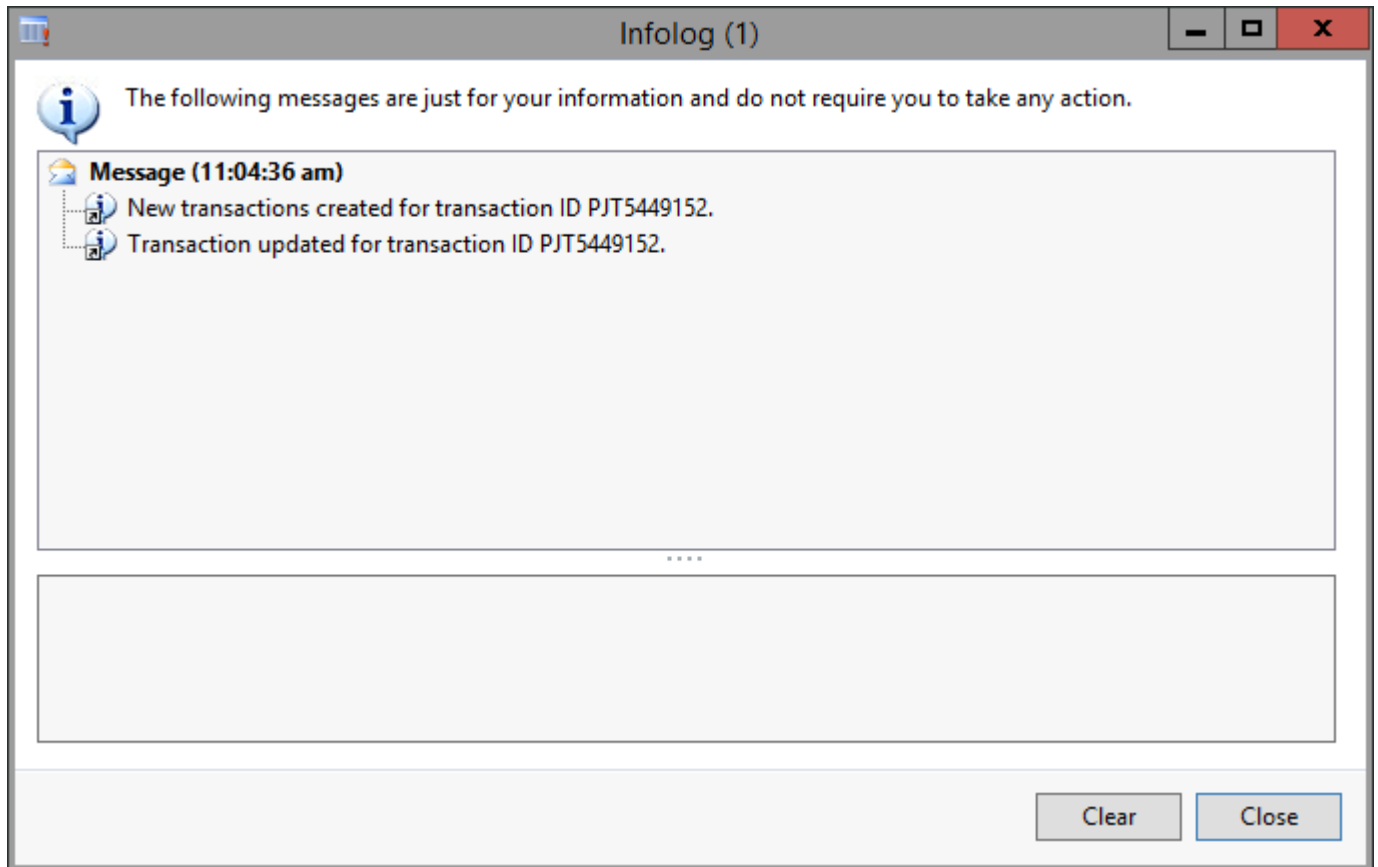
ProjectID: SC249235-02 Travel To/From - Customer Site

SalaryDescription: NA Not Applicable

Where the Contract dimension is used ☐

Select the default dimension value | 5 | NZD | ggnz | Close

14. You should now receive this message



15. Now put the segment back into **Finished**