1 June 2022

Zero cost or sales price fix

Transfer all good transactions EXCEPT the zero line

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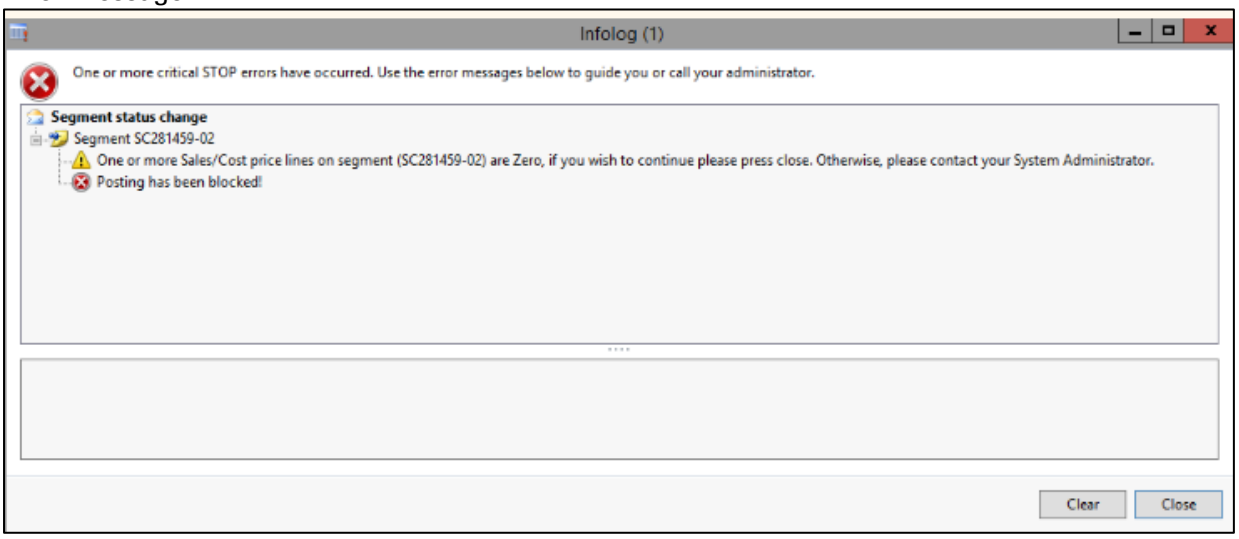
Error message

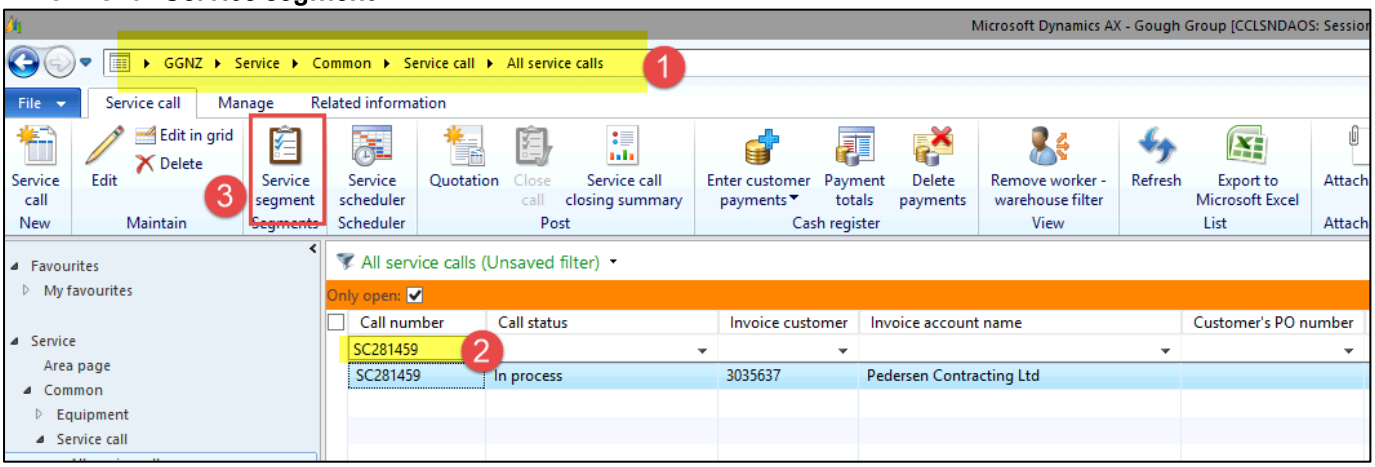


Fix:

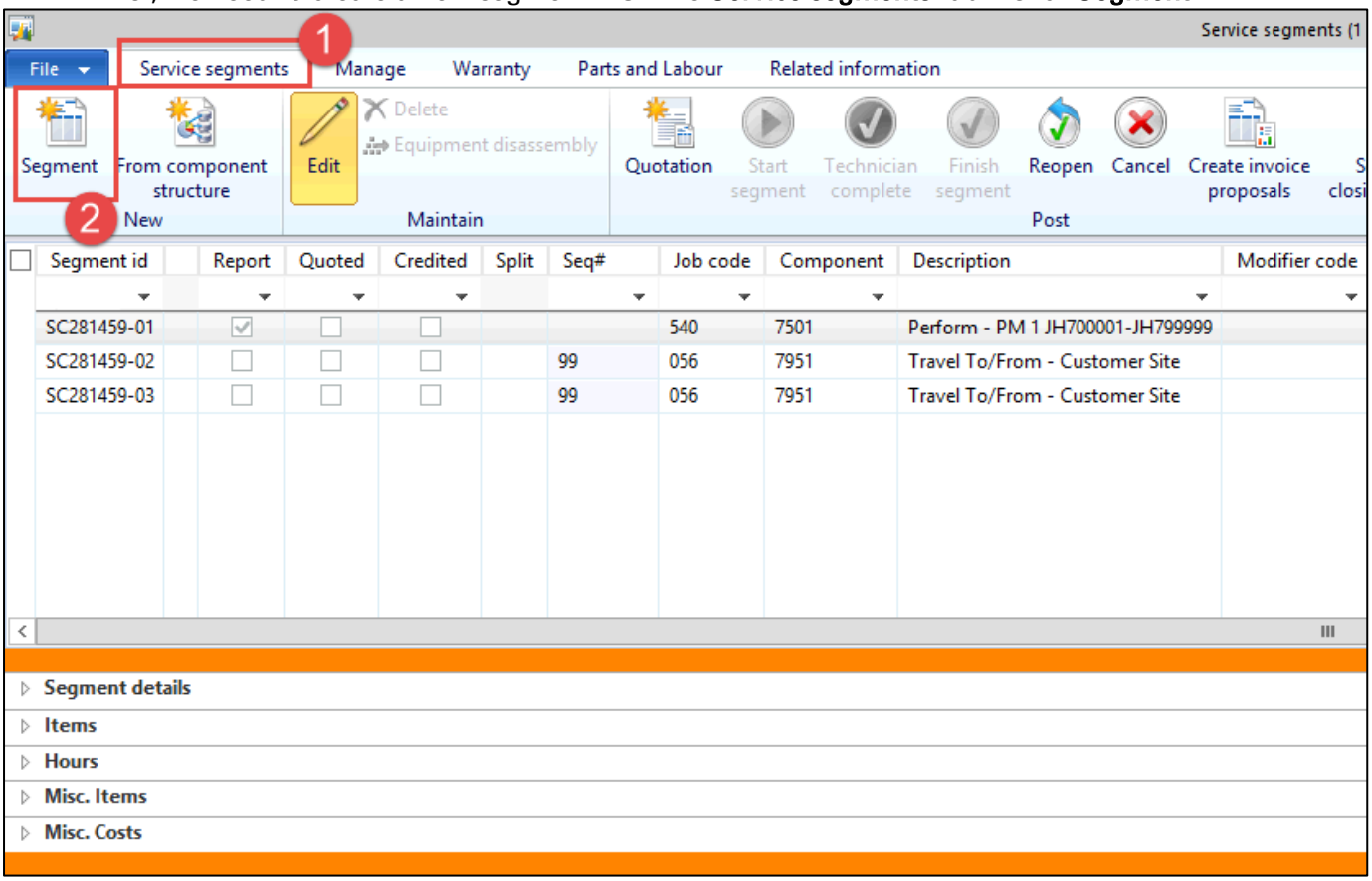
- **Create a new segment**
- **Transfer all transactions from old segment to new segment EXCEPT the line with zero cost/sales price**
- **Cancel old segment**

Steps on how to implement the fix:

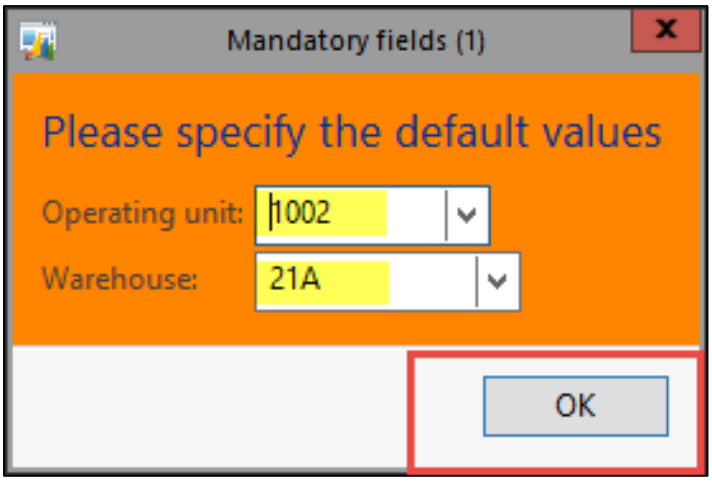
1. GGNZ > Service > Common > Service call > All service calls
2. Filter for the service call number
3. Click **Service segment**



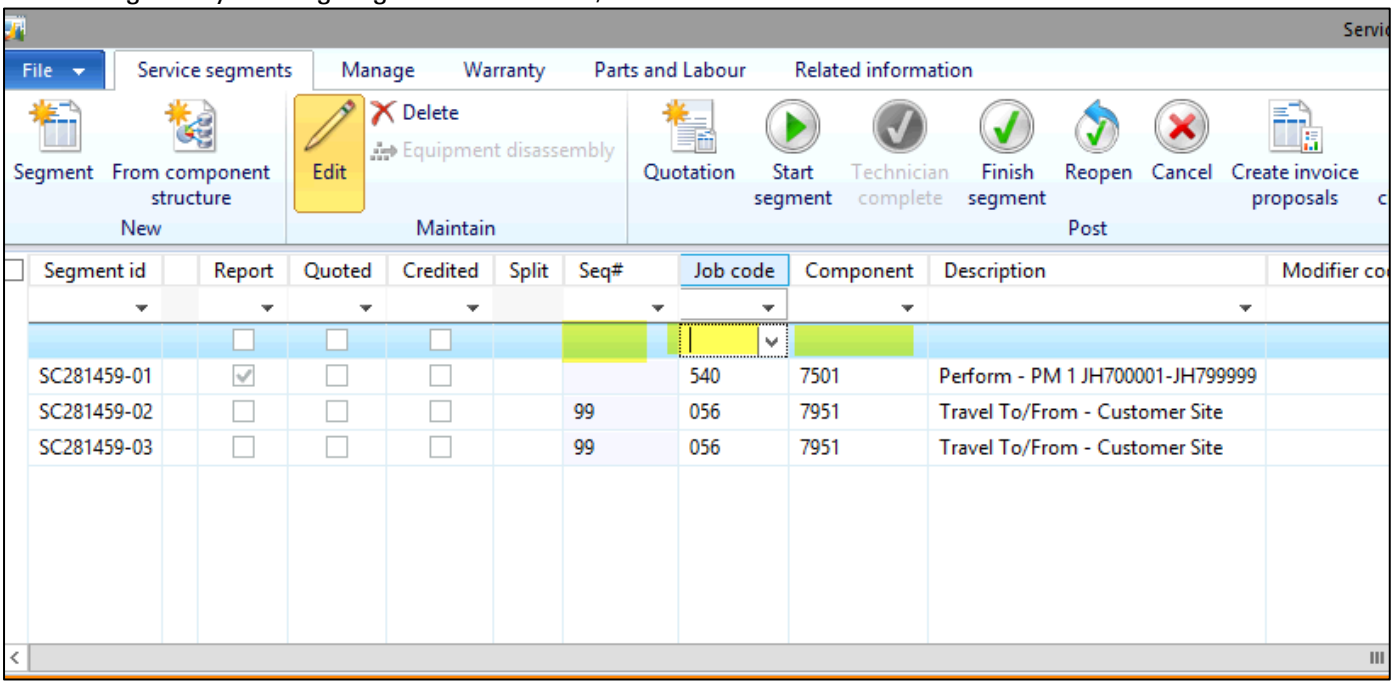
4. First, we need to create a new segment > On the **Service segments** tab > Click **Segment**



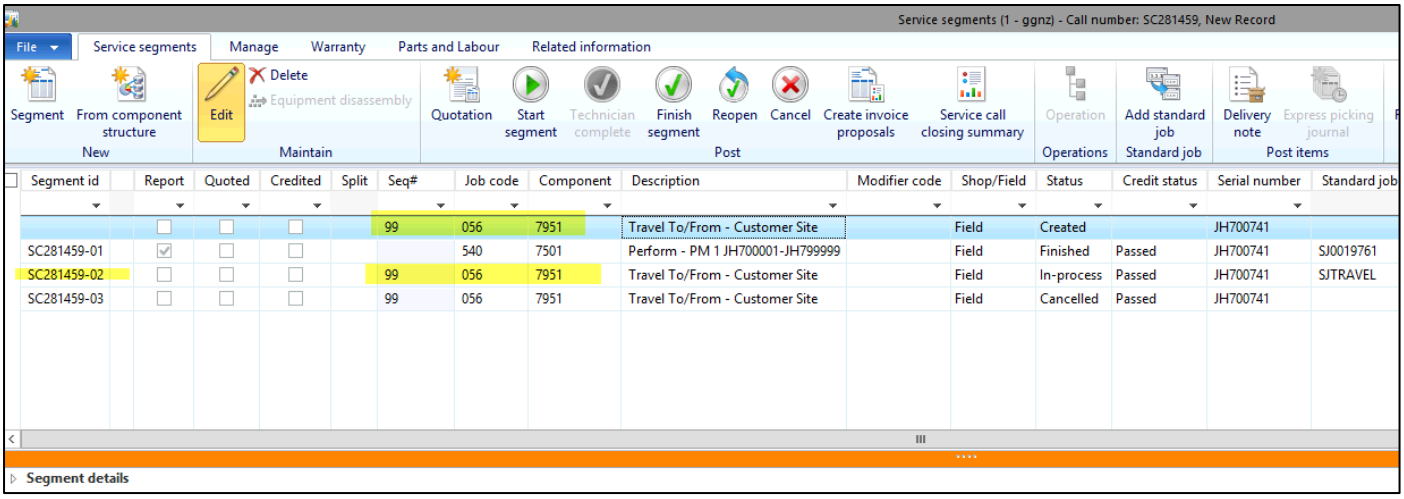
5. Put in the correct operating unit and warehouse (The below screenshot is just an example)
6. Click **OK**



7. You will need to enter in the **Seg#, Job code and Component** (this will need to match the segment you are going to transfer from)

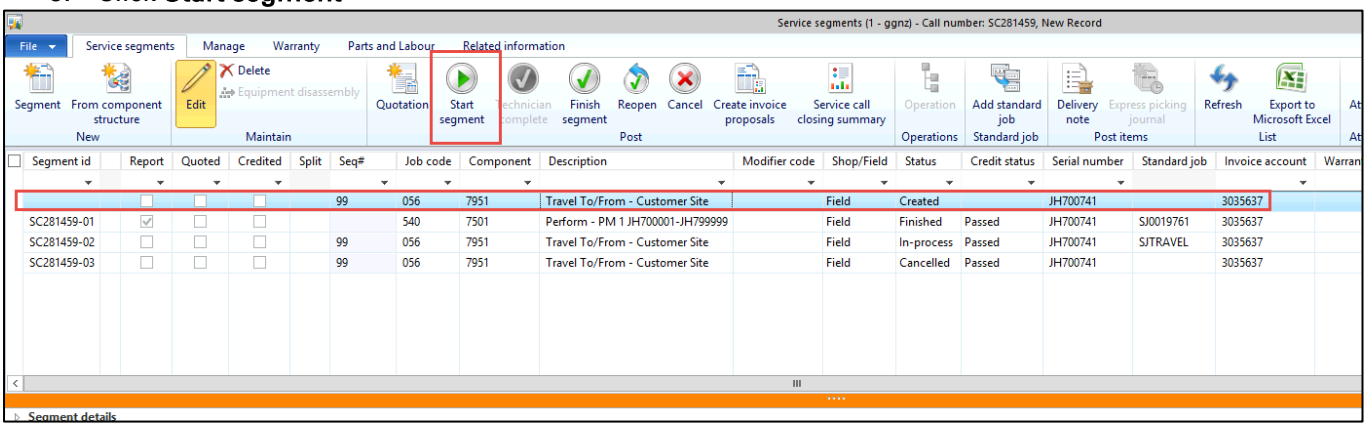


For this instance, the new segment needs to match segment 2 because we are going to be transferring the good transactions from segment 2 to the new segment

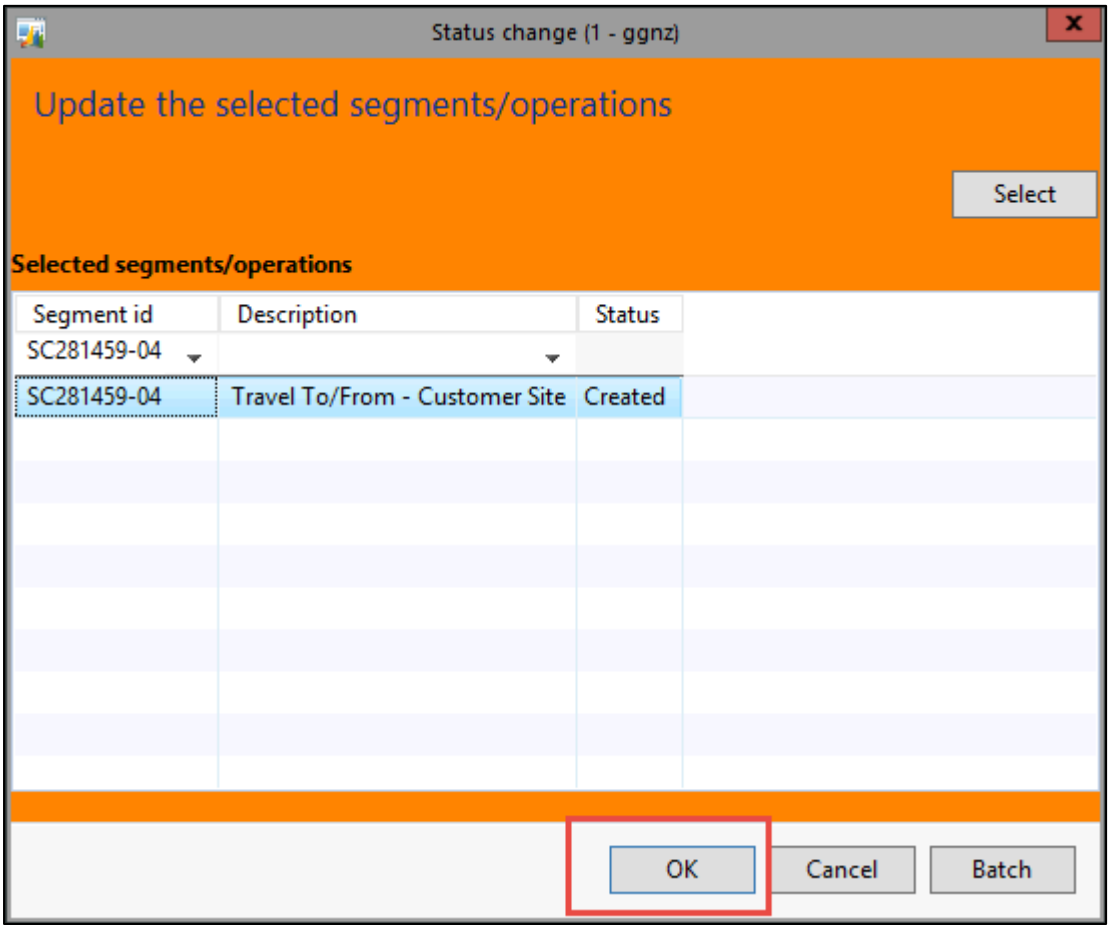


8. Make sure you have the new segment selected

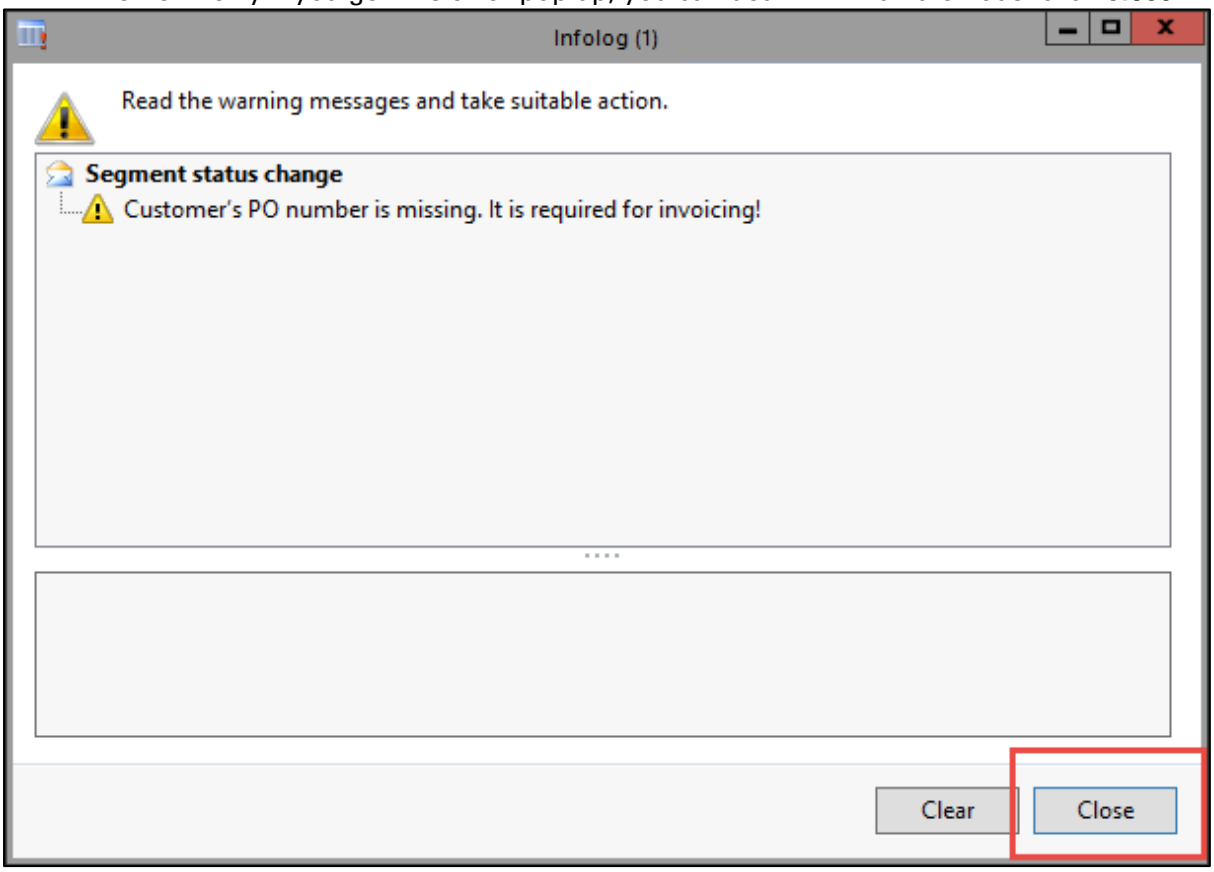
9. Click **Start segment**



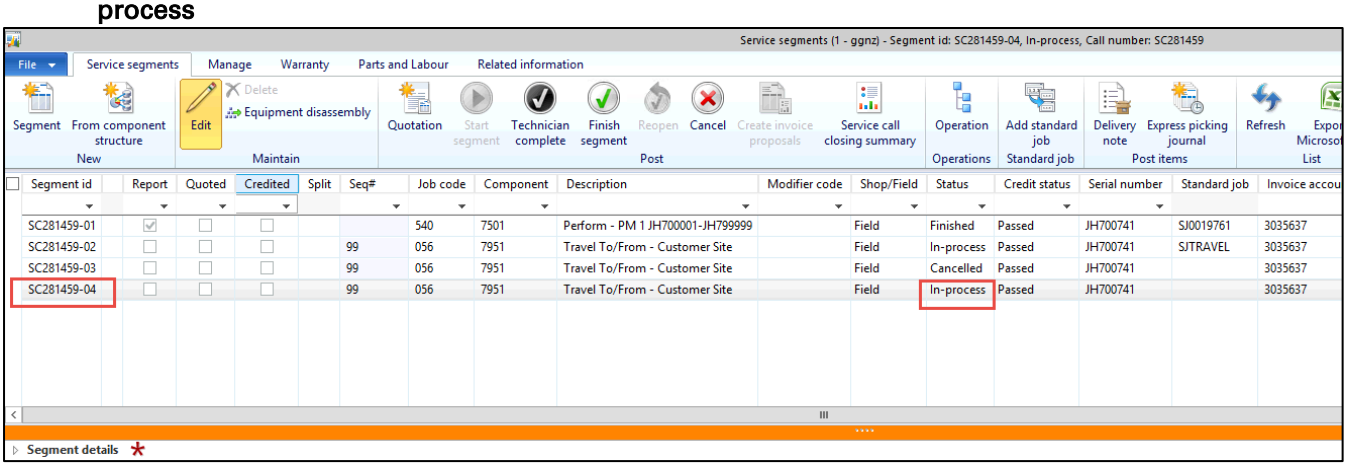
10. Click **OK**



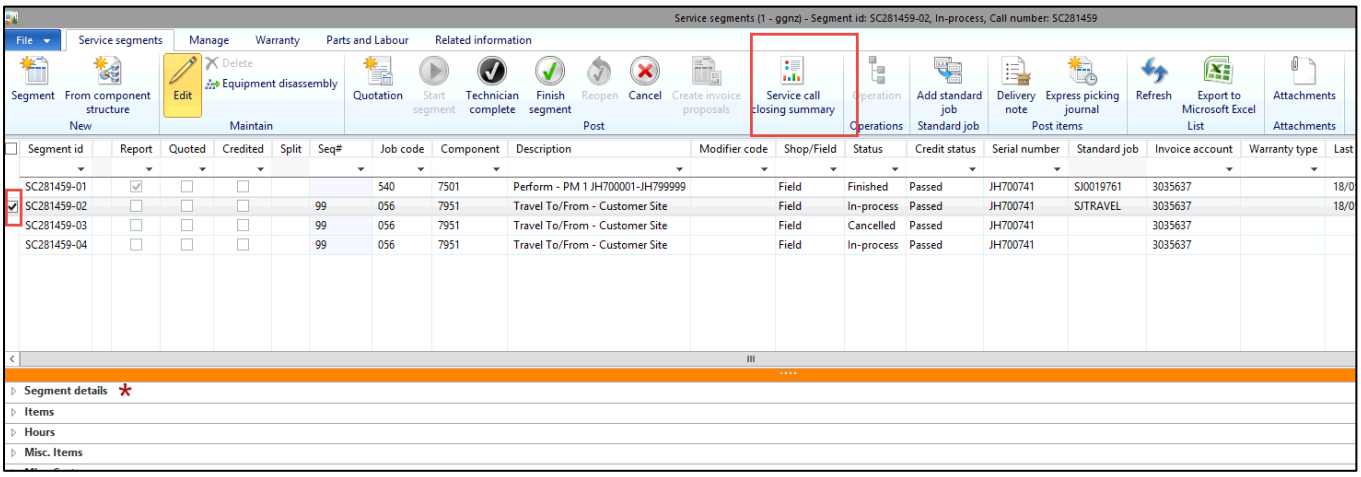
11. Do not worry if you get this error pop up, you can deal with that later. Just click **Close**



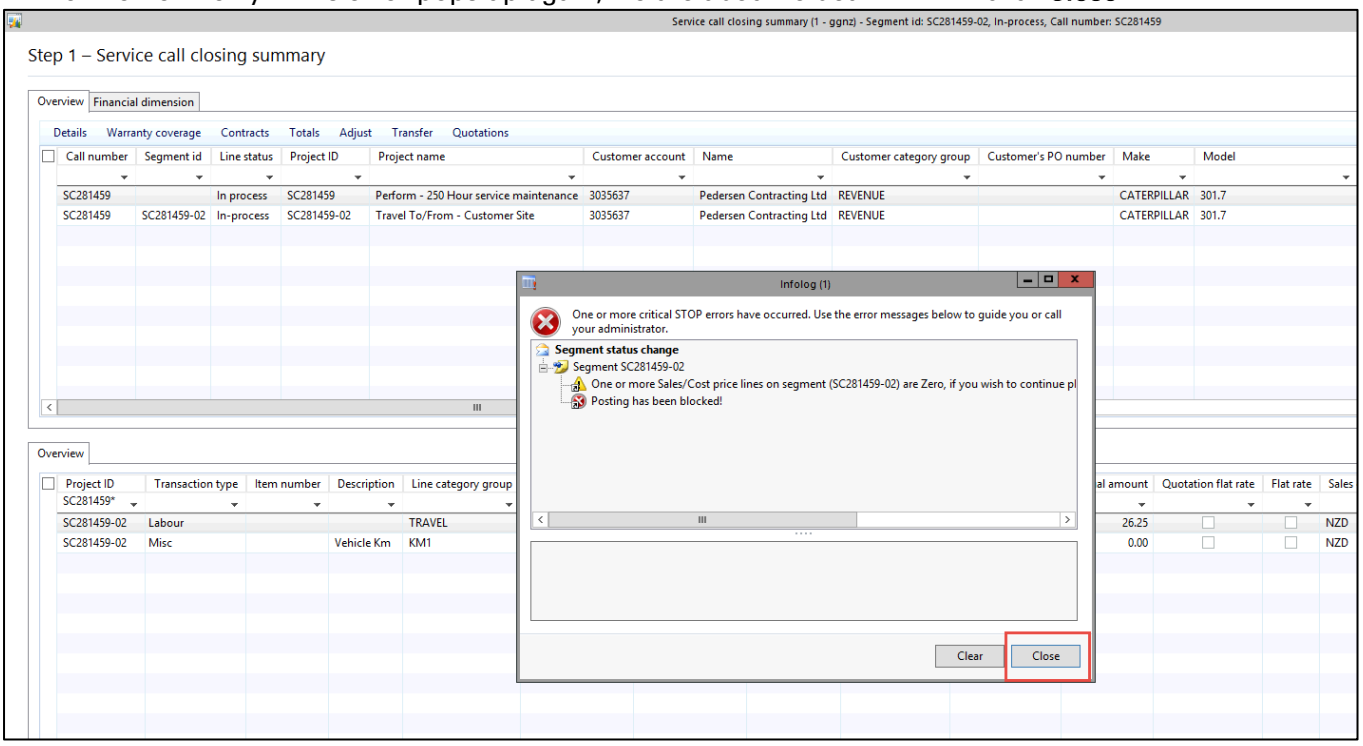
12. Now the new segment has populated its own segment number (04) and is now **In-process**



13. Tick the box next to the “old” segment (in this instance, it is segment 2)
14. Click **Service call closing summary** at the top

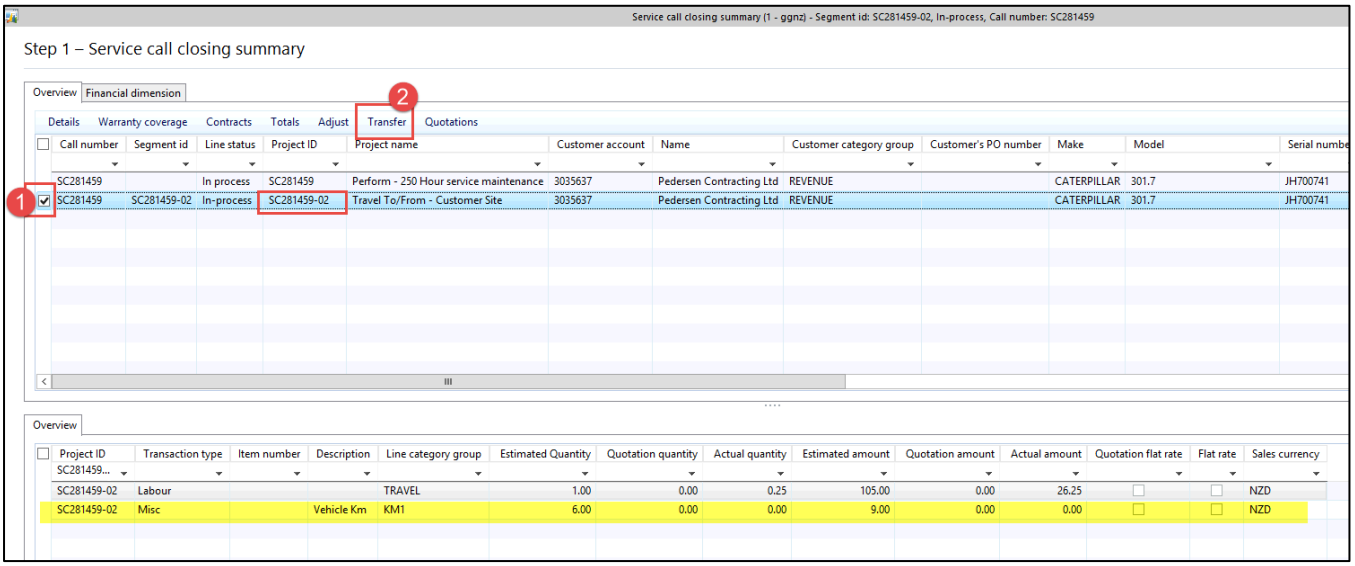


15. Do not worry if this error pops up again, we are about to deal with it > click **Close**

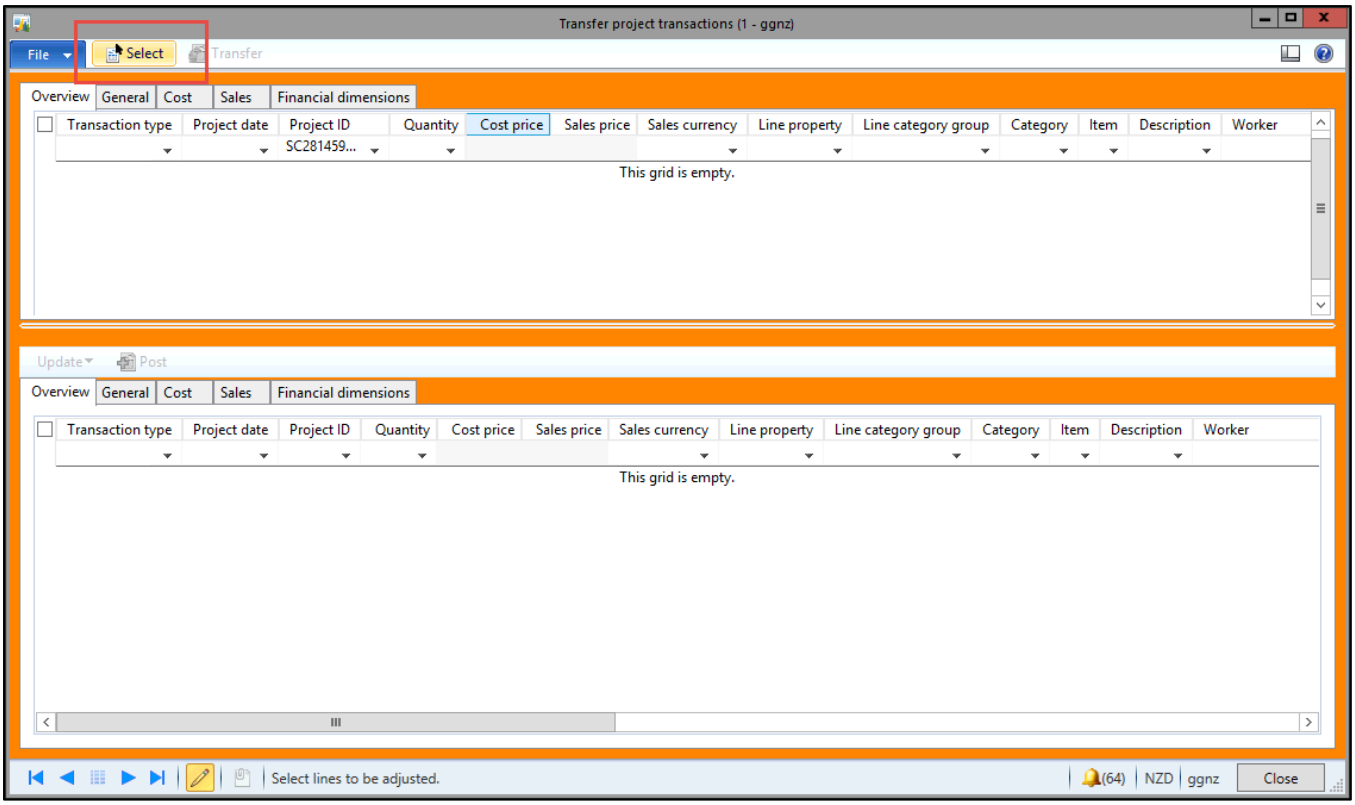


16. Tick the box next to the segment line that corresponds to the correct segment number (segment 2 for this example)

17. Also take note of what is in the below half of the closing summary screen, if there is a **Misc** line such as a KM1 (highlighted below) – this will need to be removed from the segment and put onto the new segment – we will come back to that after we have done the transfer.



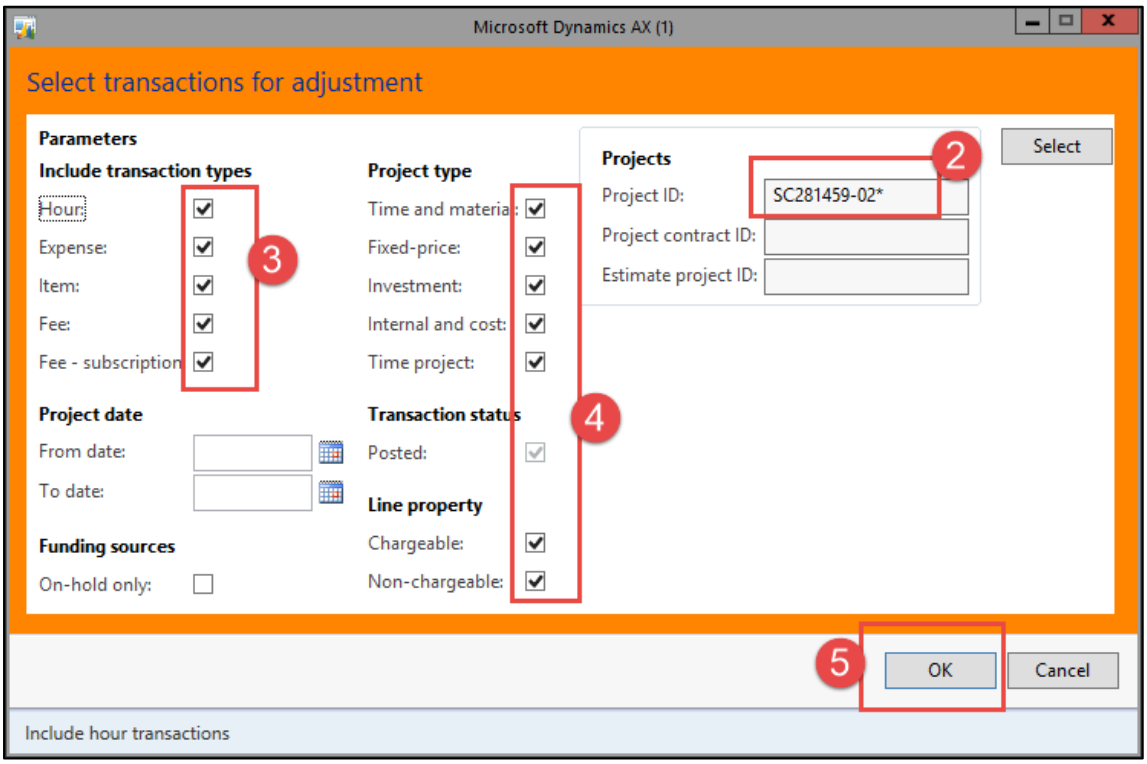
18. Click **Select**



19. Make sure that the **Project ID** shows the correct segment number that you are transferring from.

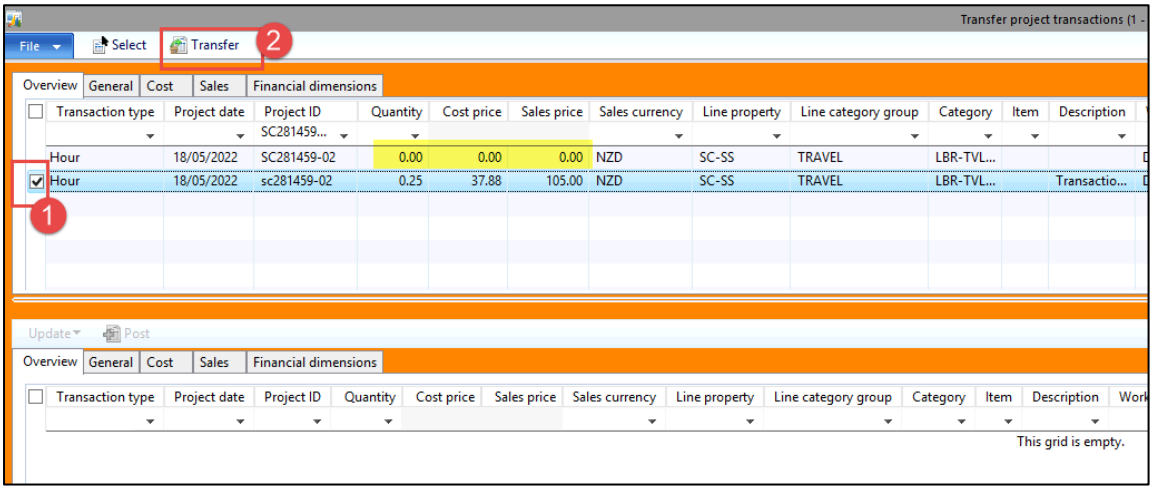
20. All boxes need to be ticked

21. Click **OK**



22. You will see all the transactions on that segment including the one that has no cost/sales price. We need to leave that one behind, so ONLY tick the one that shows the pricing

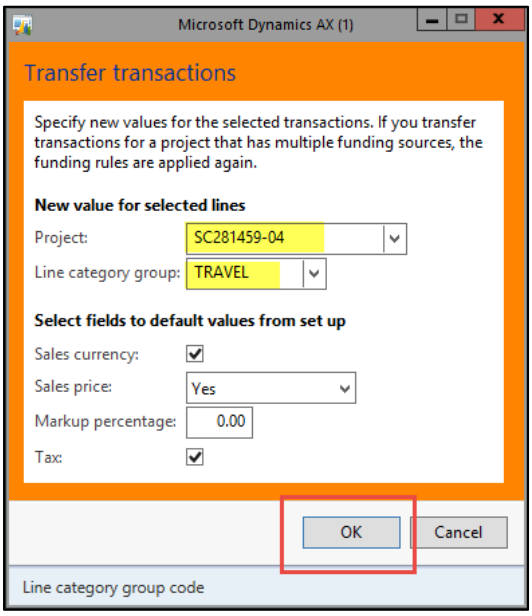
23. Click **Transfer**



24. In the **Transfer transactions** box, enter in the new segment number (for this example, it is segment 4)

25. Enter in the **Line category group**

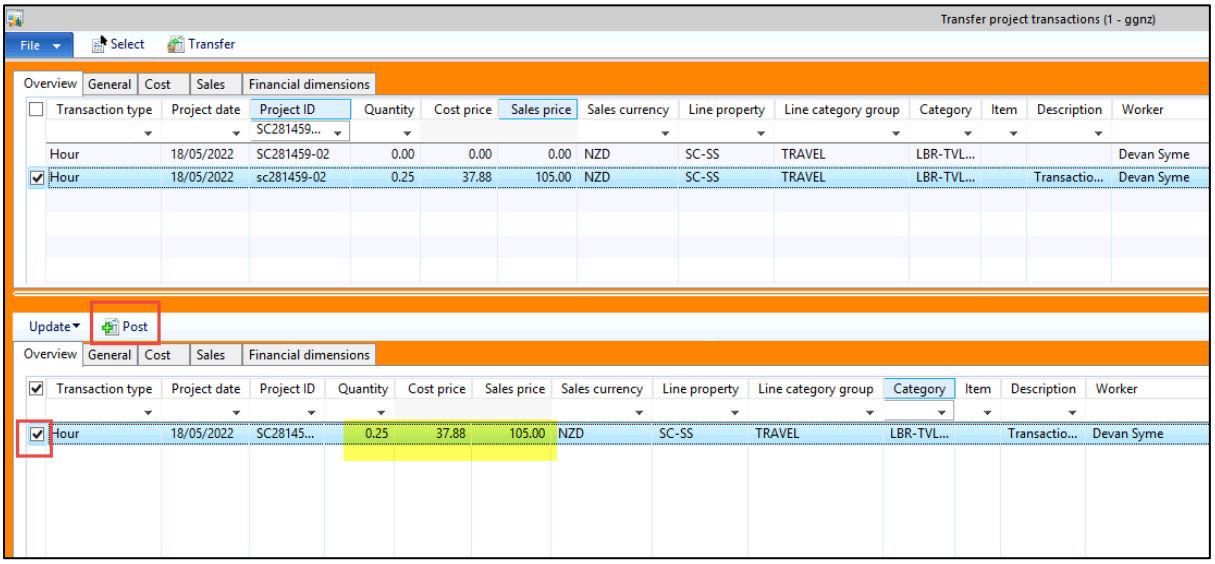
26. Click **OK**



27. The transaction/s you are transferring, will now show up in the second half of the transfer window, ready to post.

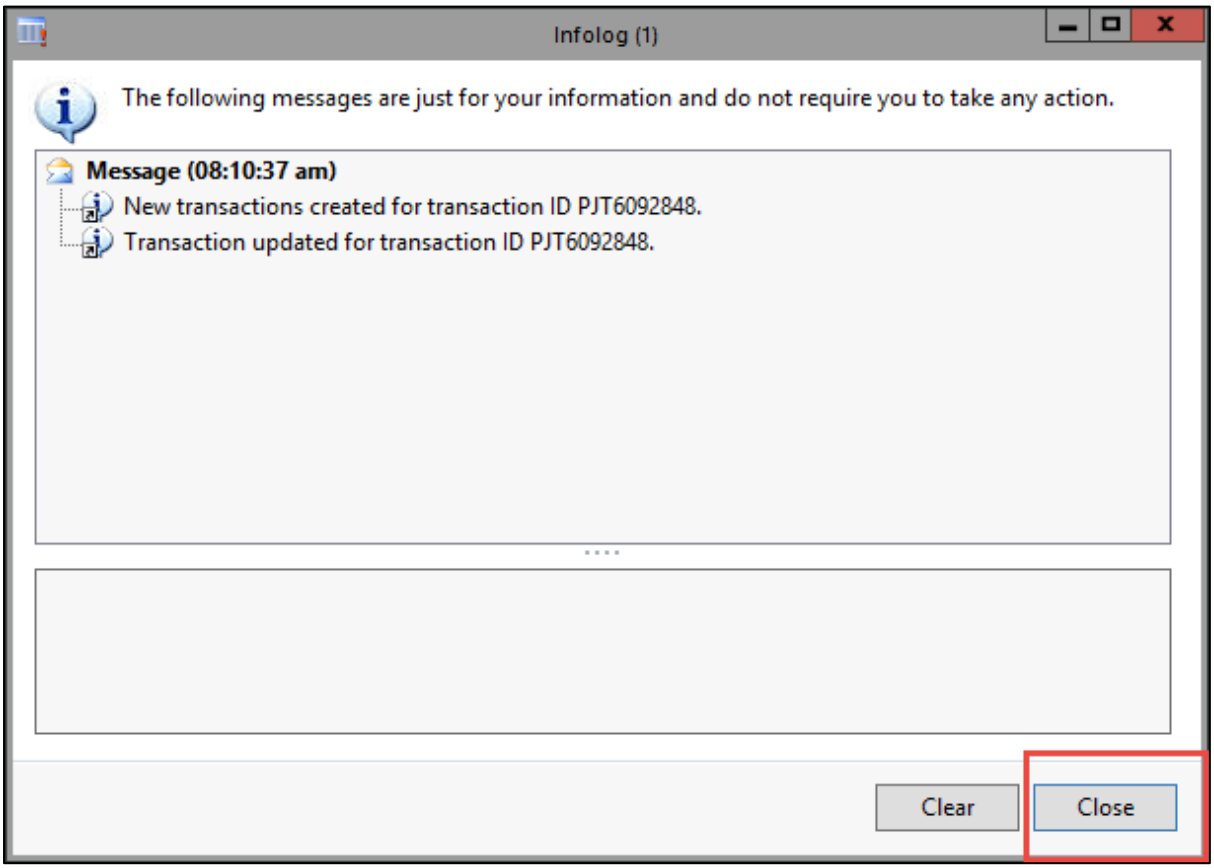
28. Make sure that there is a cost and sales price showing > if there is, then tick the box next to the line

29. Click **Post**

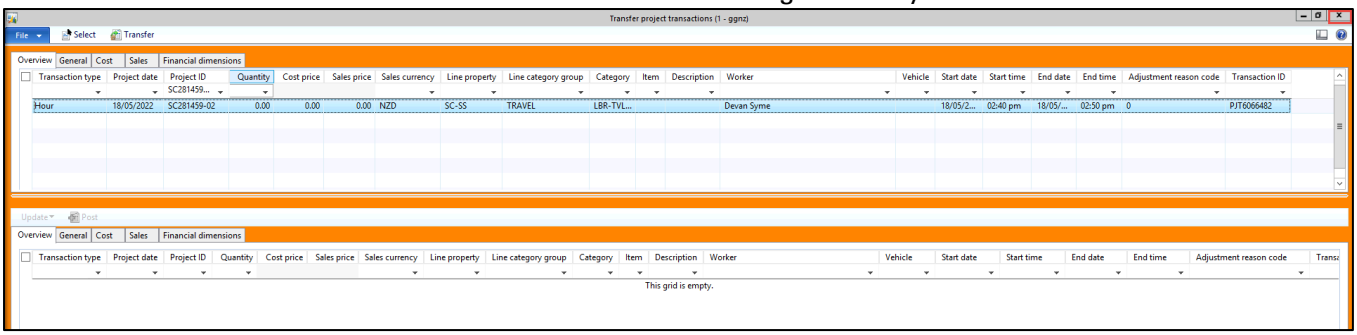


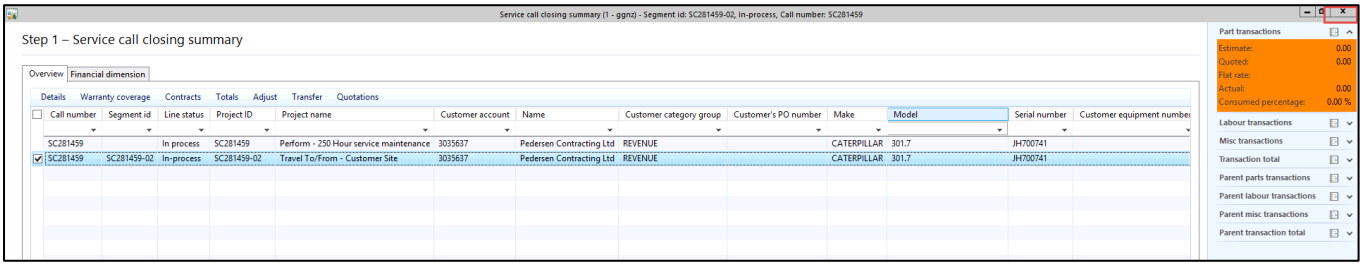
30. You should then see this screen essentially telling you that the transfer was successful

31. Click **Close**



32. You can now close the transfer window and the closing summary window

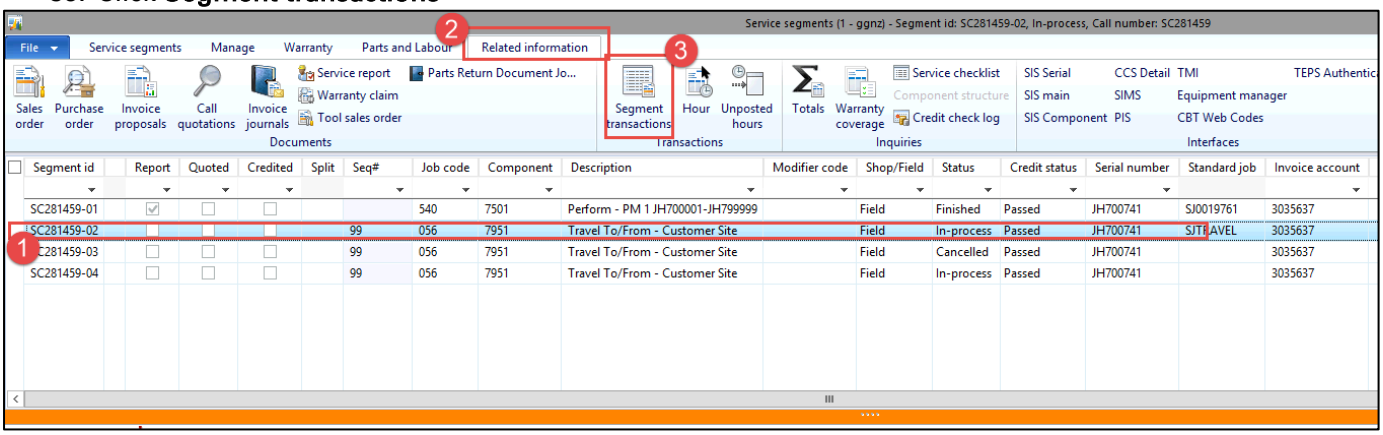




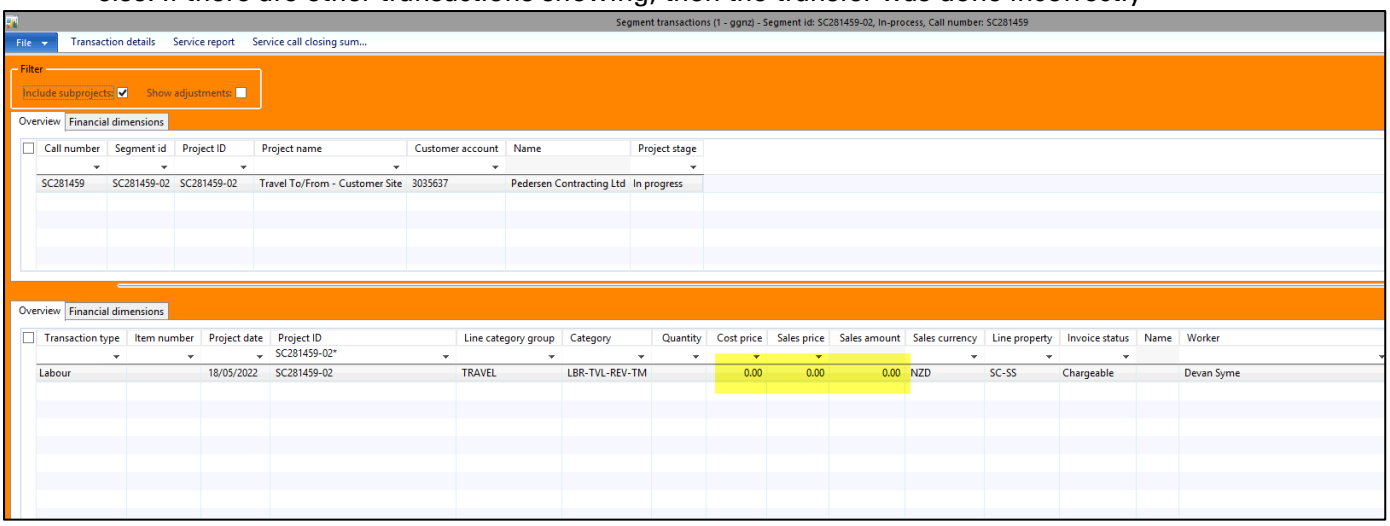
33. If you want to double check that the process has been done correctly, select the old segment

34. Related info tab at the top

35. Click **Segment transactions**



36. There should only be the transaction with the zero cost/sales price showing and nothing else. If there are other transactions showing, then the transfer was done incorrectly

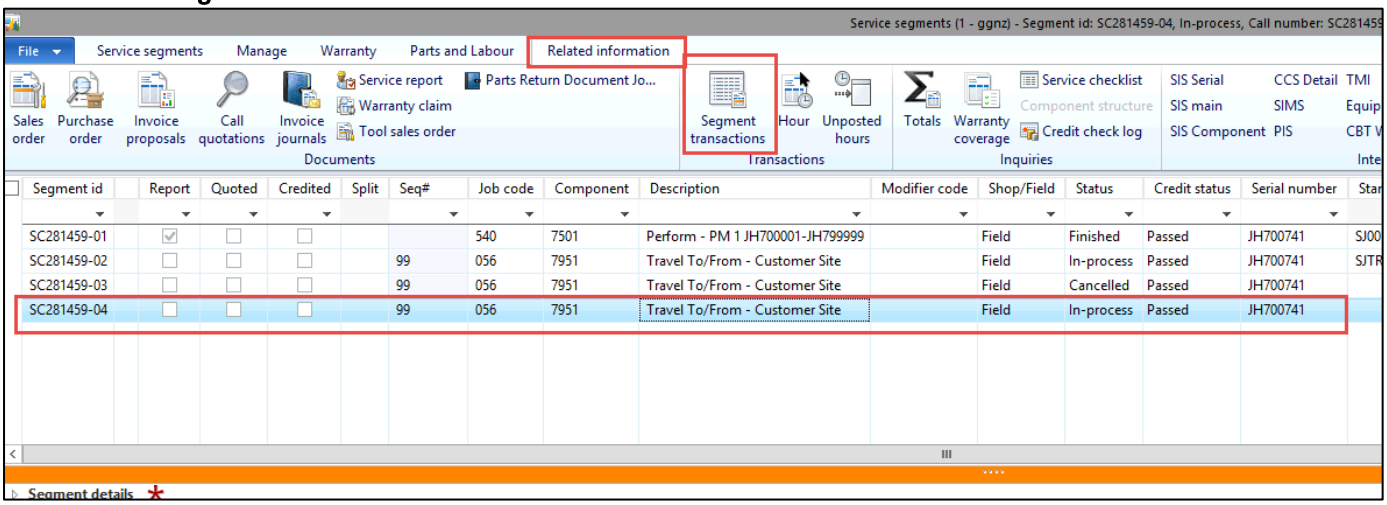


37. Close the transactions window

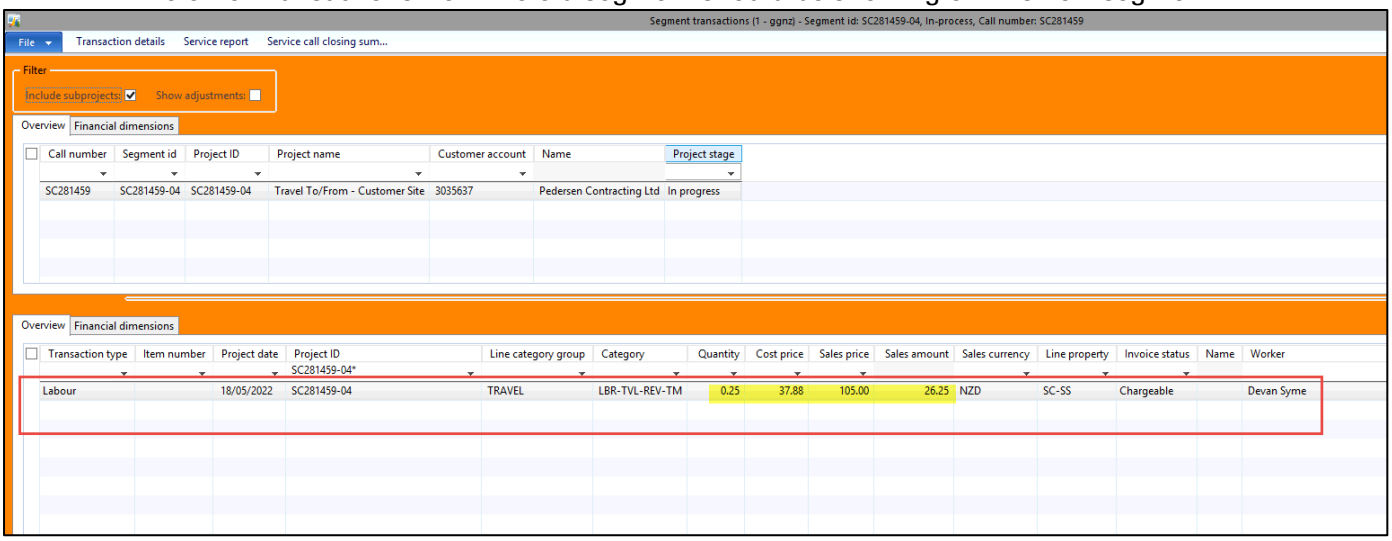
38. Now select the new segment

39. Related info tab at the top

40. Click **Segment transactions**



41. All the other transactions from the old segment should be showing on this new segment



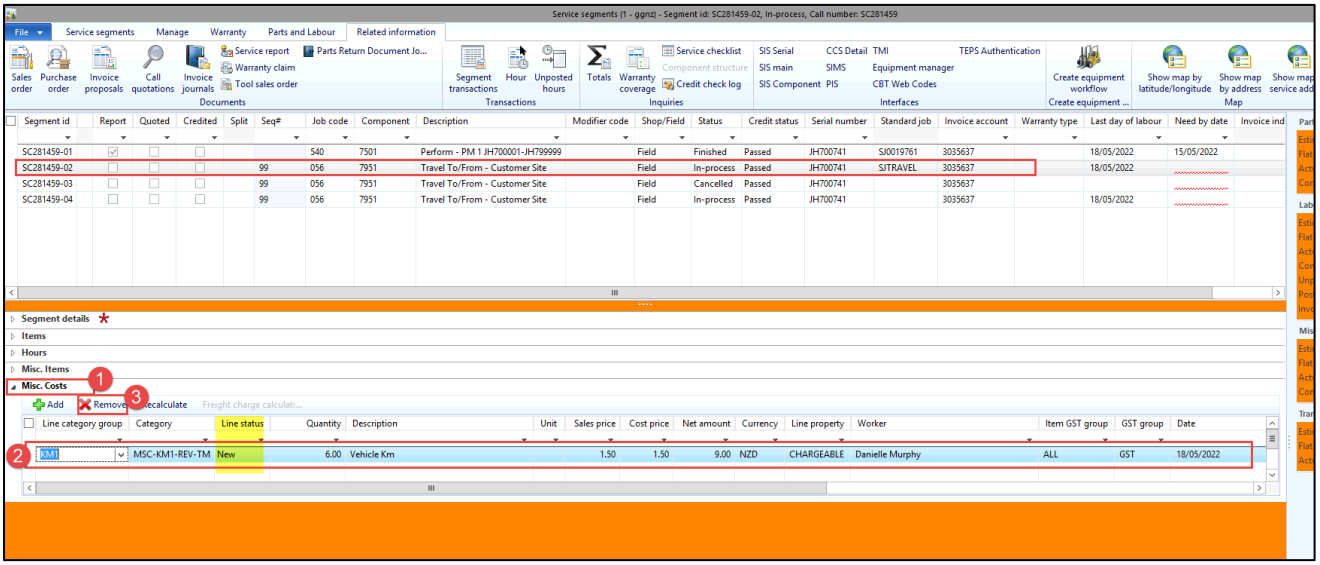
42. Close the transactions window

43. Select the old segment again

44. We need to remove the Misc Cost line (only if it the **Line Status** does not say **posted) >** take note of all the details for the line because you will need to add it to the new segment later.

45. Select the Misc cost line

46. Click **remove**

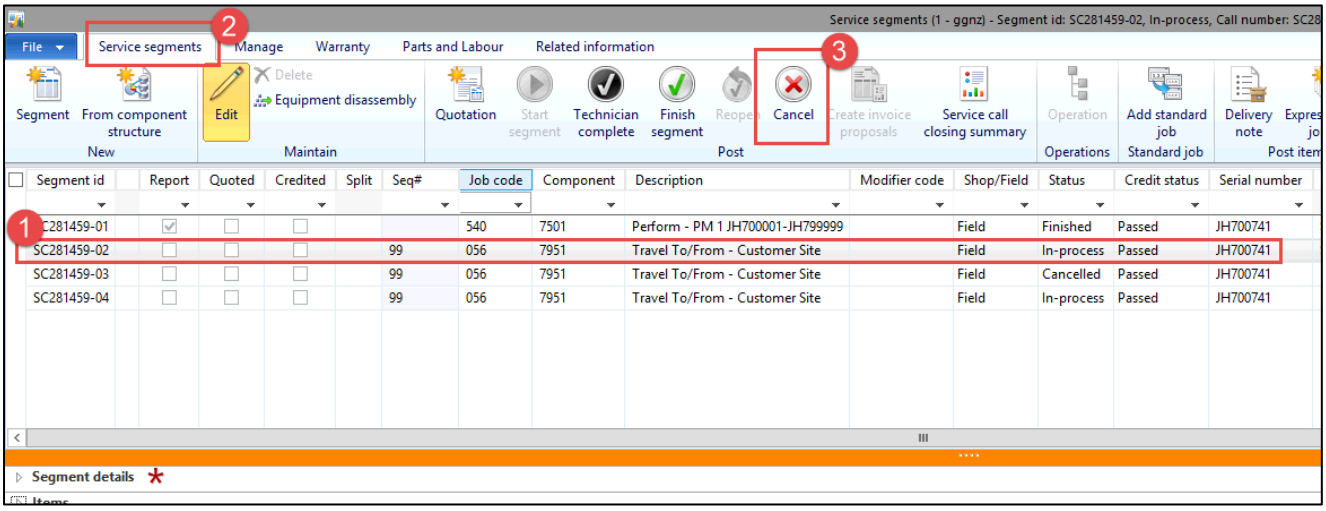


47. You should now be able to cancel the old segment

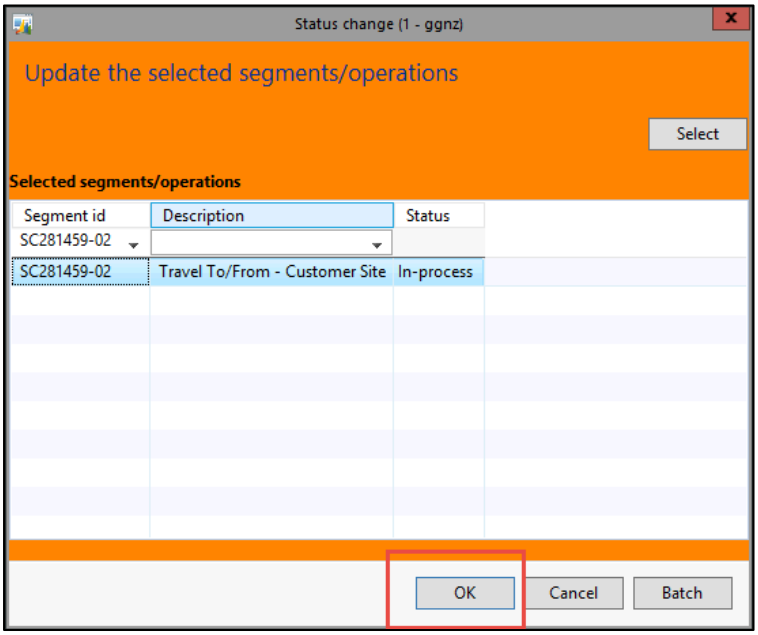
48. Select the old segment

49. Service segments tab

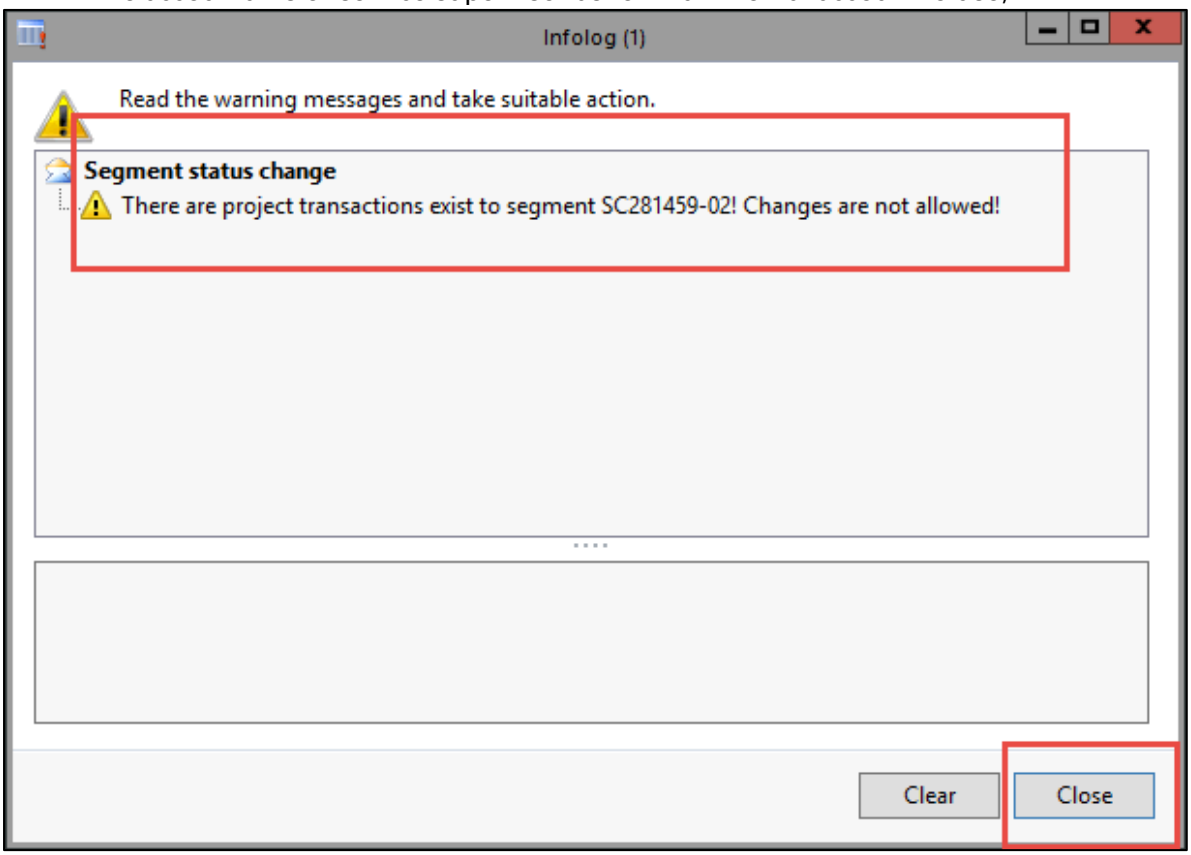
50. Click **Cancel**



51. Click **OK**



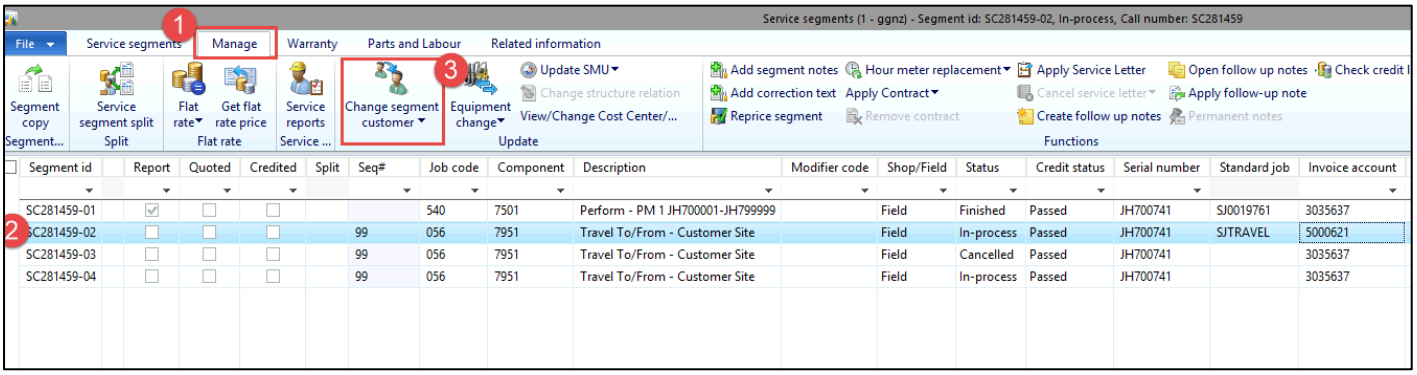
52. If you run into the below error, then you cannot cancel the segment. You will need to change the invoice customer to an internal account then invoice it for zero. (Check with the accountants or service supervisor as to what internal account to use)



53. Go to the **Manage** tab

54. Click **Change segment customer**

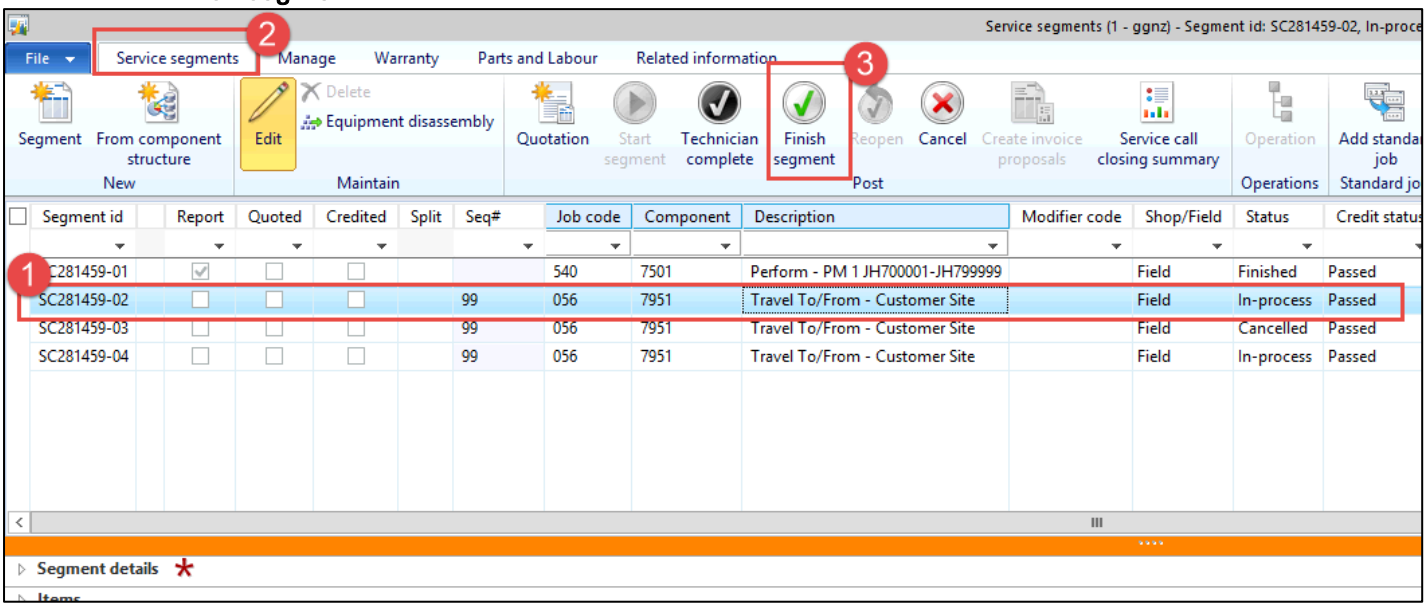
55. Enter in the internal account number > click **OK**



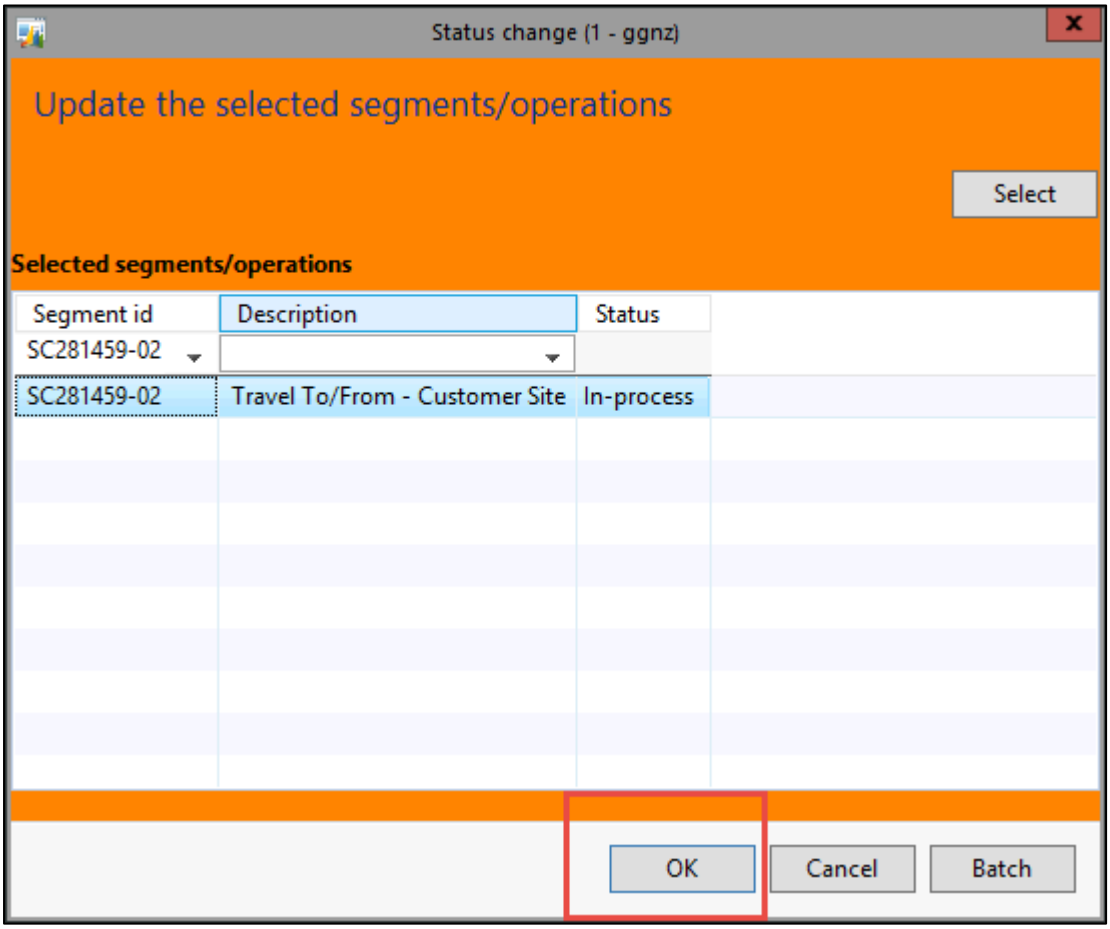
56. Select the old segment

57. **Service segments** tab

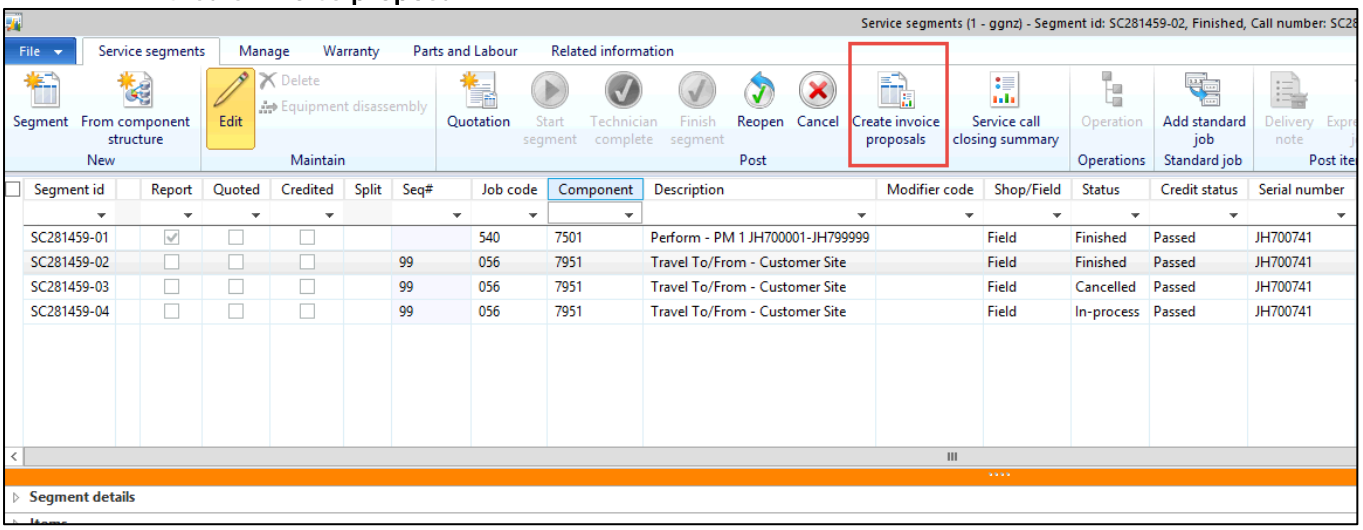
58. Click **Finish segment**



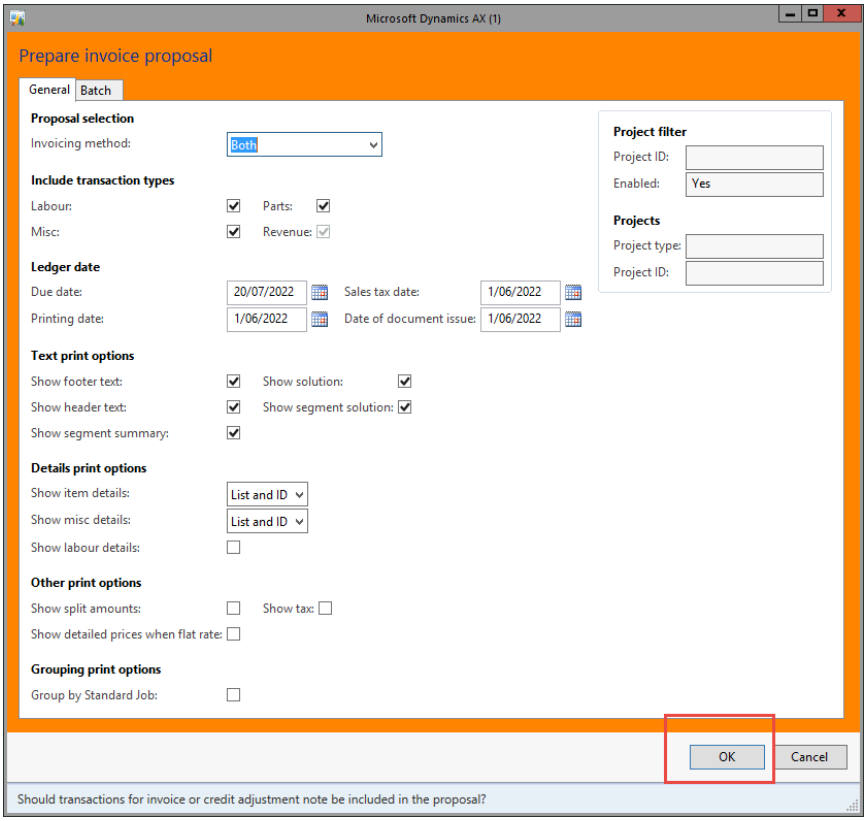
59. Click **OK**



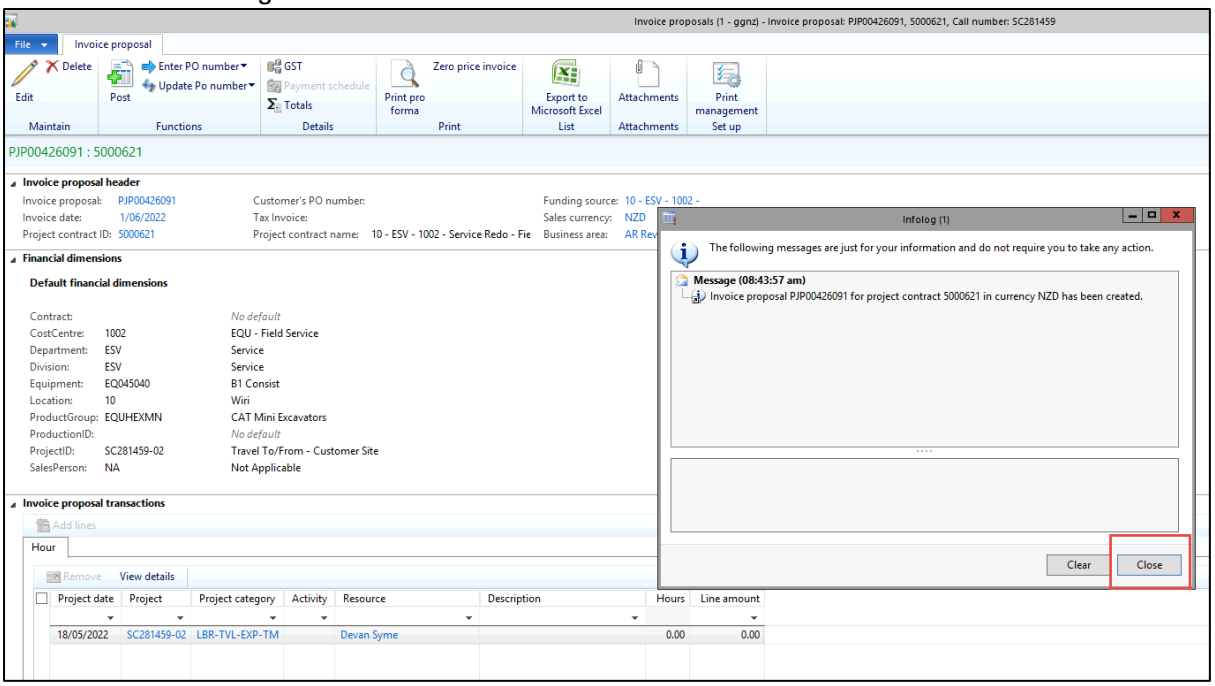
60. Click **Create invoice proposal**



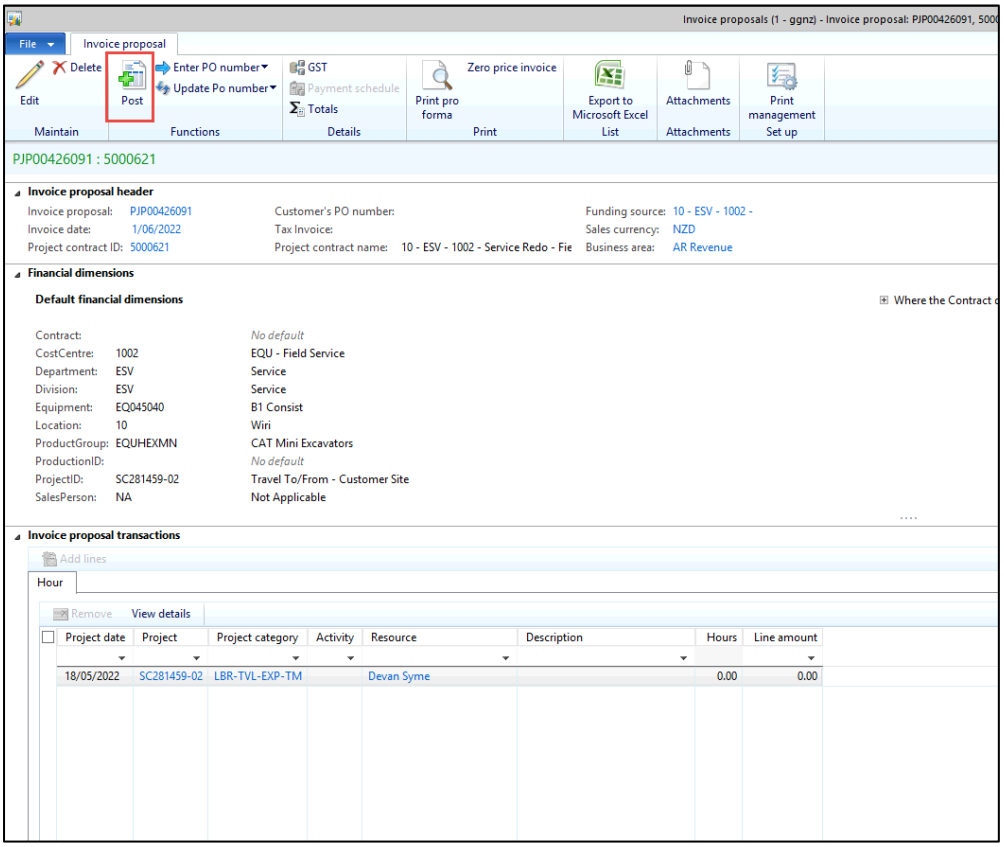
61. Click **OK**



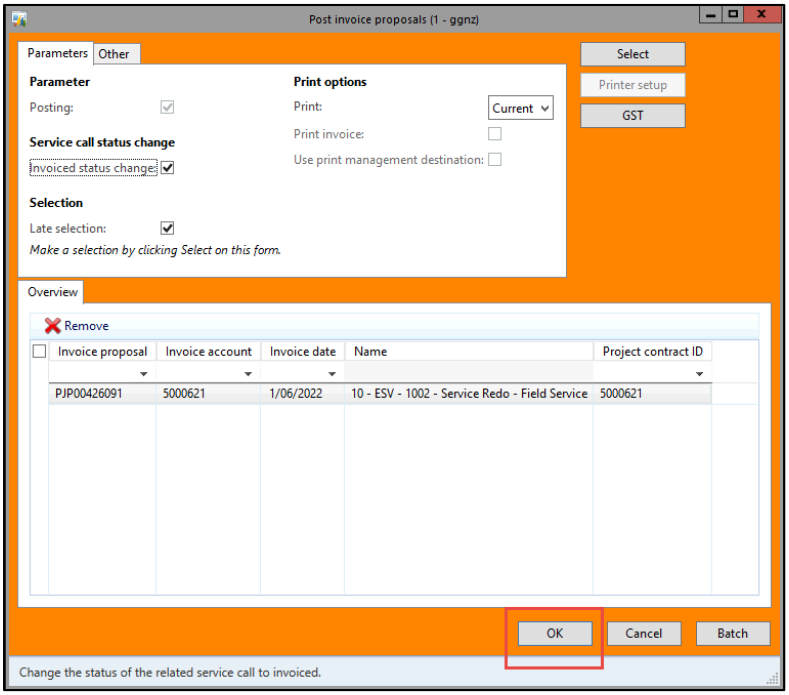
62. Invoice proposal has now been created and it should only show the zero line > click **Close** on the Infolog box



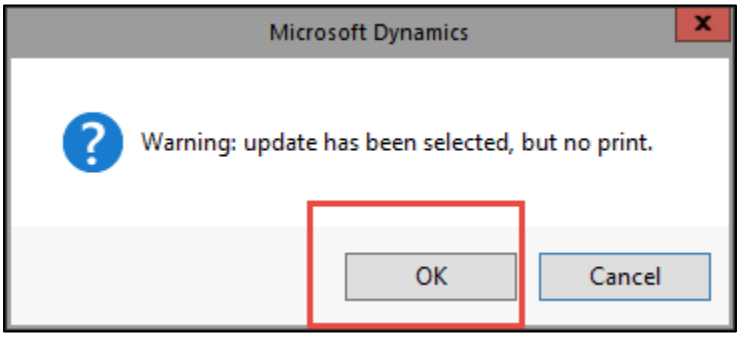
63. Click **Post**



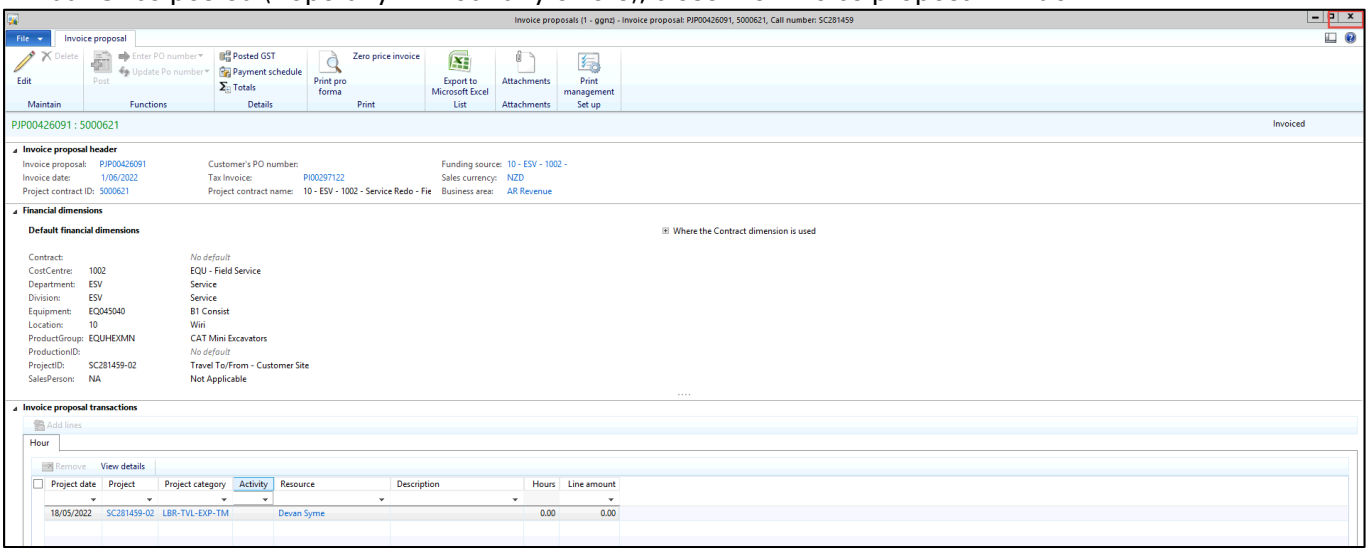
64. Click **OK**



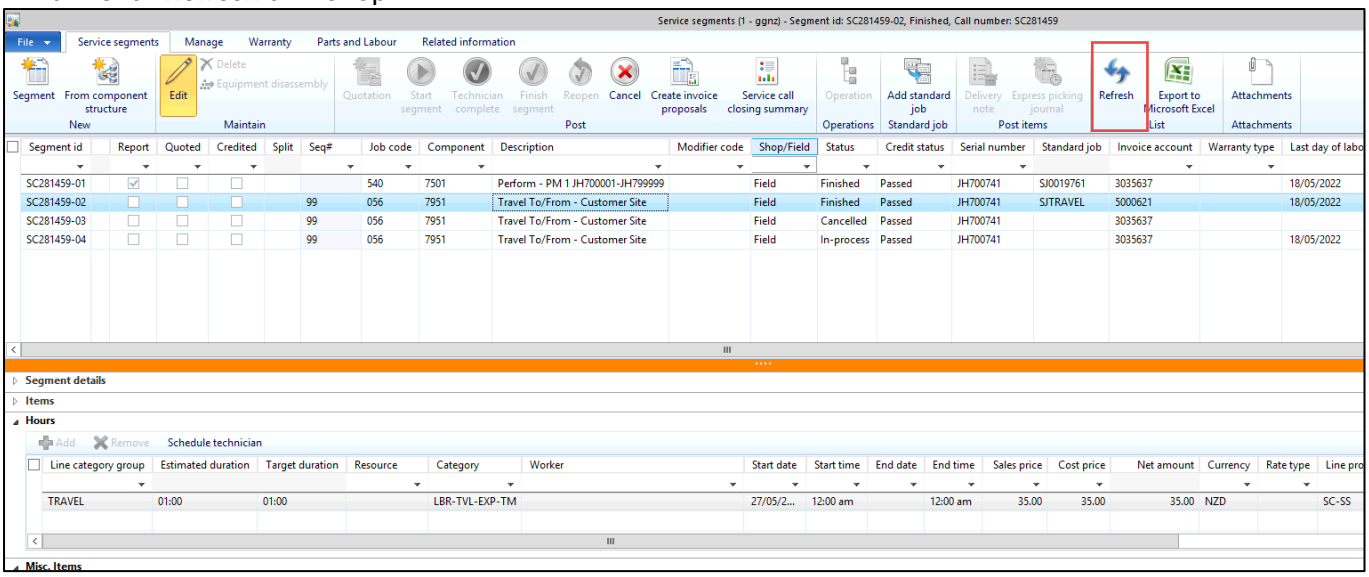
65. Click **OK**



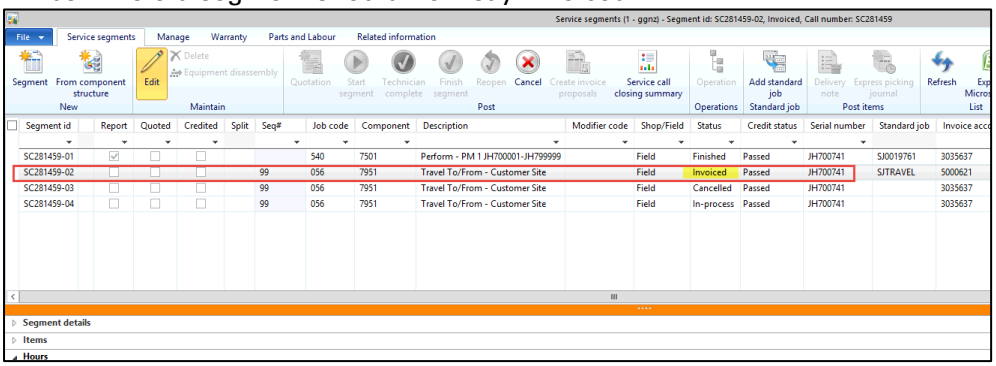
66. Once posted (hopefully without any errors), close the invoice proposal window



67. Click **Refresh** at the top



68. The old segment should now say invoiced

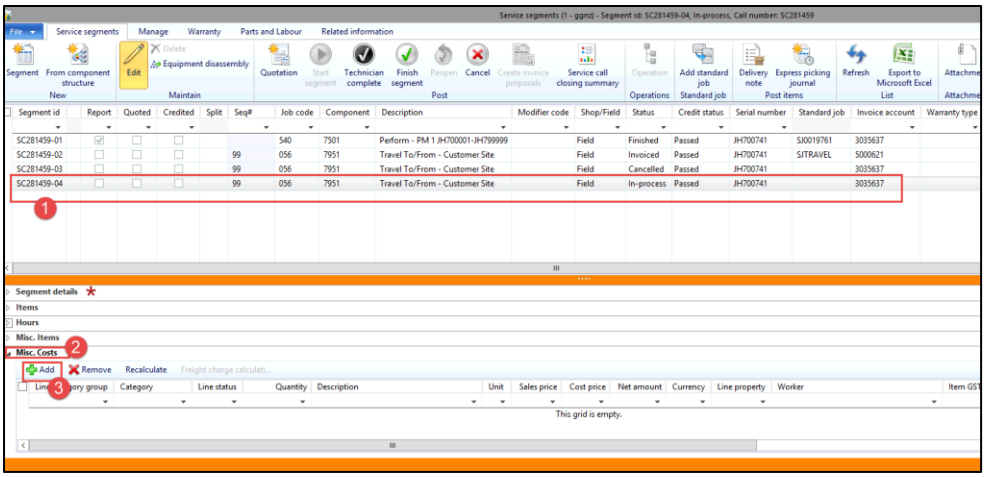
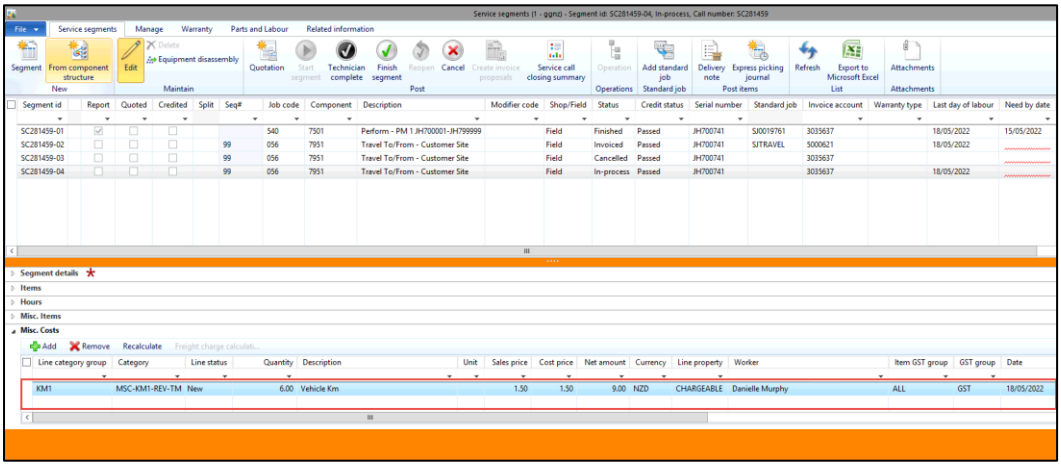


69. You now need to add the misc cost line to the new segment

70. Select the new segment

71. Expand **Misc Costs**

72. Click **Add**



73. Misc Cost line is now added