



Optimize Fleet Productivity

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How do I correct mistakes on a Fuel Transaction?

The method used to correct the transactions will depend on the Record Posted status of the Fuel transaction.

The easiest time to correct mistakes on a Fuel transaction is before the transaction is posted. Take the time to review and audit transactions before saving and posting them.

To correct *un-posted* fuel transactions:

Fuel transactions that are not posted indicate that the costs & quantities disbursed on the fuel transactions **have not** yet been posted against the Equipment or Inventory tables. You can still modify any field for that transaction.

1. Access the Fuel Entry screen.
2. Click to select the Fuel Transaction to modify.
3. Tab to the field(s) you want to modify and make changes as desired.
4. Verify the edited Fuel transaction contains the correct information before you click the Save and Post icon. CFAWin will post all fuel transactions upon saving if the user has posting access rights.
5. Click the Save and Post icon.

NOTE: An empty box in the Posted Record column indicates the transaction row(s) has/have **not** been saved and posted. These rows can be modified or deleted.

To correct *saved and posted* fuel transactions:

Saved transactions have *already* updated the Equipment Master and Fuel Transaction tables with cost and quantity information, and **cannot** be edited or **deleted**. You **must credit** these transactions to avoid discrepancies between fuel transactions and the Equipment and Inventory tables.

1. Access the Fuel Entry screen.
2. Press <F9> on your keyboard to Switch Data View to view all Fuel transactions.
3. Click to select the Fuel Transaction that contains the mistake.
4. Click the Credit (green minus sign) icon or use the hot-key Ctrl+R.
5. Click the Save and Post (diskette) icon or (Ctrl+S) to post the credit and cancel out the costs & quantities of the credited line.
6. Click the Credit icon to insert a new entry. Make necessary adjustments to the equipment number, meter reading, fuel quantity, usage, etc.
7. Verify the edited Fuel transaction contains the correct information before you click the Save and Post icon. CFAWin will post all fuel transactions upon saving if the user has posting access rights.
8. Click the Save and Post icon.

NOTE: Any discrepancies with the Fuel Cost will need to be adjusted appropriately where CFAWin obtains the Fuel Unit Price information (i.e., Fuel/Fluid Rate Table, Inventory Table, or fuel system) prior to inserting a new entry.

Any adjustments made to Fuel Unit Price for the purposes of crediting should be changed back to the current Unit Price once the credit has been posted.