

Copying a Works Order to a different Budget Year

1 - When setting up the Works Order in question, ensure that there are no costs against that Works Order. Select the budget in the current year just to complete the Works Order. Then fill out all the other relevant information that is needed.

DO NOT ISSUE, only **SAVE** the Works Order.

2- Once you have saved the Works Order, head back to the Works Order list and tick directly to the left of the Works Order you want to use. Once you have ticked the one you need, press **Duplicate** at the bottom of the table.

The screenshot shows the 'All Works Orders for Budget Year 2020' window. The table contains the following data:

WO No	Date	Sub Budget	T	Description	Call Ref	B Code	Staff/Contrator	Ap	Crr	Iss	FP	Comm. Cost
888901	09/01/2020	Site Four	R	123	0	GB1	Grounds Budget					
888900	09/01/2020		R	SPLIT: Test	0	KBY	Maintenance Tear					
888899	09/01/2020	Site Four	R	Test	0	KBY	Maintenance Tear					
888895	06/01/2020	Site 1	R	Test	0	FSH	Grounds Budget					£375.00
888894	16/12/2019	Site Four	R	Test	0	FSH	Maintenance Tear					£20.00
888893	19/11/2019	Site 1	R	Order new doors for	0	FSH	Arctica					£53.00

The 'Duplicate' button in the bottom toolbar is circled in red. The toolbar also includes buttons for Add, Delete, Show All, Show Subset, Query, Order By, Print Options, Report, and Home.

3) The following window will now appear. Simply choose the 2021 budget year and the budgets you need to associate this Works Order with. Press **OK** once complete.

The dialog box titled 'Duplicate 1 Works Order to:' contains the following fields:

- Year: 2020
- Main Budget: Maintenance Budget
- Sub Budget: Site Four

Buttons for 'OK' and 'Cancel' are located at the bottom of the dialog.

As soon as you press ok, it will then take you to the 2021 Budget Year list, showing your Works Order there.

You may now enter any costs on this Works Order.