



# Unable to Edit a Transaction in Search/Edit Transactions in Strata Master

## Summary

Some transactions can be edited in the Search/Edit Transactions screen. When clicking on the transaction, a pop up box will show editable fields. This article will assist clarify when you cannot edit the fields you wish to edit.

If a required field is not editable in this screen, you can generally do so with Journals.

## Overview

The editing of fields can be divided into 4 categories -

- Fields editable for all time.
- Fields editable up to Annual Rollover of a Plan.
- Fields are only editable with journals.
- Unpaid invoices.

Once the Annual Rollover is processed, many fields are then locked in the search/edit transaction screen, and then require journals to adjust. Find the Financial Year End in the Corp screen.

The screenshot shows a software window titled "Strata Plan 3333 - Read Only Mode". It contains several input fields and a table. The "Financial year end" field is highlighted with a red box.

This plan is managed	
Registered lots	4
Total lots	4
Residential lots	0
Commercial lots	0
Primary lots	4
Utility lots	0
Retirement lots	0
Other lots	0

Note that any changes made through the search/edit transactions screen will be reflected in the Audit Trail report.

## Fields Editable for All Time

Fields that can be edited for all time are generally those listed below. Note there can be variations in this -

- Descriptions of invoices and payments
- Invoice numbers
- Descriptions of levies, levy receipts and owners corp receipts
- Descriptions of Journals
- Cancelled transactions

The screenshot shows the 'Edit Transaction' window with the following data:

Read only values			
Plan no.	3333	Type	Invoice
Due date	31/01/2021	User	TEST
Amount	120.00	Status	Paid
Tran. date	29/01/2021		
GST	10.91	Date entered	05/04/2022 04:14:41 PM
Dr account	Maint Grounds--Lawns & Gardening - Admin		
Cr account	Creditors--Other--Admin - Admin		
Editable values			
Description	Lawnmowing Jan 2021		Invoice no
			3211

Transaction is in a completed financial year.

## Fields Editable Up to Rollover of a Plan

The following fields are editable in this screen until a relevant Plan has been 'rolled over' to its new financial year. Once the financial year rolls over, the fields are in the read only values section. The transactions can be edited after rollover however, using journals.

- Expense accounts with the same gst code in Chart of Accounts
- Expense accounts with the same Fund eg Admin or Sinking Fund
- Income accounts for standard accounts such as status certificate fees and strata inspection fees.

This screenshot is identical to the one above, but with the 'Dr account' field ('Maint Grounds--Lawns & Gardening - Admin') highlighted with a green border, indicating it is currently editable.

## Fields Only Editable With Journals

Some items are prohibited from being changed in this screen by legislation. The following changes require journal entries to edit anything but the basic details -

- Accounts where the 2 involved accounts have different gst codes in Chart of Accounts.
- Accounts where the 2 involved accounts are in different Funds eg Admin or Sinking.
- Dates of transactions.

**Edit Transaction**

EXIT [Refresh] [Save]

Read only values

Plan no. 3333    Type Invoice    Due date 31/01/2021    User TEST

Amount 120.00    Status Paid    Tran. date 29/01/2021

GST 10.91    Date entered 05/04/2022 04:14:41 PM

Dr account Maint Grounds--Lawns & Gardening - Admin

Cr account Creditors--Other--Admin - Admin

Editable values

Description Lawnmowing Jan 2021    Invoice no 3211

Transaction is in a completed financial year.

## Unpaid Invoices

Unpaid invoices are changed in the Creditor Invoices screen. There is a note to this effect in the Editable values section as below.

**Edit Transaction**

EXIT [Refresh] [Save]

Read only values

Plan no. 5555    Type Invoice    Due date 31/08/2021    User TEST

Amount 350.00    Status On Hold    Tran. date 02/09/2021

GST NIL    Date entered 05/04/2022 11:07:50 AM

Dr account Maint Bldg--Pest/Vermin Control - Admin

Cr account Creditors--Other--Admin - Admin

Editable values

Description Pest Control August 2021    Invoice no 9876

Account still unpaid - use invoice entry to change.

## Related Articles

[Journals to Correct GST on Payments](#)

[Journals to Correct GST on Receipts](#)

[Check Chart of Accounts for GST Codes](#)

[Move Transaction From One Fund to Another](#)

[Change the Date of a Transaction](#)

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