PUT A WORK TASK ON ACCOUNTING HOLD

Provides guidance on how to put a work task on Accounting Hold in Facilities Connect.

DIRECTIONS:

1. From the Facilities Connect Home Screen:
   1. Click on Tasks section.

2. Upon clicking, the Tasks screen will open:
   2. Click on the All Tasks report.
PUT A WORK TASK ON ACCOUNTING HOLD

DIRECTIONS:

3. Upon tapping, the All Tasks screen will open. Because of the size of the report, the default view will be blank.
   3a. Enter criteria in any of the search fields beneath each of the column headers.
   3b. Initiate the search by pressing the Enter key.

4. Once you locate the appropriate Work Task:
   4. Click on the Task Name to open.
PUT A WORK TASK ON ACCOUNTING HOLD

DIRECTIONS:

Upon clicking, the **Work Task record** will open in a new window:

1. **Click on the Job Cost tab.**

From the Job Cost tab:

1. **Scroll down to the Job Cost Billing section.**
PUT A WORK TASK ON ACCOUNTING HOLD

DIRECTIONS:

7

In the Job Cost Billing section:

7a  Click on the Billing Status drop down arrow.

7b  Click on Accounting Hold.

7c  Click on Save.
PUT A WORK TASK ON ACCOUNTING HOLD

DIRECTIONS:

8 Next, document the reason you are placing this work task on account hold:

8 Click on the Notes & Documents tab.

From the Notes & Document screen, locate the Comments section:

9 Click on the Add button.
PUT A WORK TASK ON ACCOUNTING HOLD

DIRECTIONS:

10 A new Comment window opens:

10a Type your comment.

10a Click on Create.

Upon clicking, the Comment window closes.

From the Work Task record:

11 Click on Save & Close.