Correct Data without Deleting History

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Overview

This guide will help you correct master or transaction data using the safest auditable method available.

The corrected state is achieved with the original and correction relationship retained.

Who can do this

You need access to View and record-specific update/reversal authority; deletion requires separate clear approval.

Before you start

Identify original stable ID, error, downstream dependencies, correct result, period/status, physical/external effects, evidence, and approver.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Open the original record through its inquiry/history and use supported Update, Cancel, Reverse, Inactive, or replacement workflow.

Correct Data without Deleting History

Step 1: Preserve original evidence and full dependency chain

Step 2: Update only non-substantive fields where safe

Step 3: Set unused masters inactive/retired instead of deleting

Step 4: Reverse/cancel posted economic events and create one correct replacement

Step 5: Correct external accepted records using provider/statutory procedure

Step 6: Reconcile all downstream stock, party, payment, tax, and ledger effects

Check your work

History shows who changed what and all source/subledger/ledger/external controls compare and confirm.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Never use undocumented offsets to conceal errors.
- Do not delete a dependent or externally accepted record to force correction.

Related guides

- Resolve a Referenced or Dependent Record Error
- Prevent and Resolve Duplicate Transactions
- Transaction Status and Lifecycle Reference

What to do next

> **Resolve a Referenced or Dependent Record Error**.

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