

Edit an Invoice

Last Modified on 12/04/2024 1:58 pm EST

An Invoice may be edited if the following conditions are true:

- No payments have been applied to the invoice.
- The invoice has not been mailed or emailed to the customer.
- The user has permissions for editing invoices.

To edit an Invoice, you must first access the customer record.

From the main menu, arrive at the Customers list with this path: CRM > Customers.

The Customers list is displayed. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.

Customer #	Name	Address	City	State	Balance Due	Total RMR
3654	Holmes Fans	10556 Washington Street	Chagrin Falls	OH	\$0.00	\$0.00
3652	Cactus World	3601 Saguaro Street	Tucson	AZ	\$0.00	\$0.00
3606	Smith, Aaron	123 Main St	Columbus	OH	\$182.81	\$30.00
3504	Allen Automotive Services	634 Morgan Street	Cincinnati	OH	\$182.81	\$30.00
3502	Tesay	Address1	City	OH	\$0.00	\$0.00
3499	Edwards Security	345 Main Street	Columbus	OH	\$221.47	\$55.00
3498	Crafted Crates	233 Widmore Ave	Columbus	OH	\$222.56	\$30.00

The Customer record is displayed. Click on the Invoices tab. A list of all invoices for the customer will be shown in the grid area. In the Invoice # column, click on the hyperlink of the invoice you want to edit.

Invoice #	Invoice Date	Due Date	PO Number	Total Amount	Amount Due
21446	Mar 22, 2022	Mar 22, 2022	84412	\$58.30	\$58.30

The Invoice is displayed. At the upper right of the page, click the **Edit** button.

Manual Invoice 21448

Emily Wood #3719-01 Emily Wood - 45722 Chandler

Invoice Amount: \$58.30
Balance Due: \$58.30
0 Payments = \$0.00
0 Credits = \$0.00

Category: 400 SVC
PO Number: 84412
Work Order: -
Invoice Date: March 22, 2022
Due Date: March 22, 2022
Contact: Emily Wood
Billing Address: 45722 Chandler

Sales Tax: MI - 6.0000%
Term: Due on Receipt
Salesperson: Kathy Ackerman
Delivery Method: Print
Originally Delivered: -
Sales Package: None

Items: 1

Item Part Code	Item Description	Qty	Rate	Taxable	Sales Tax Code	Amount
Service Fee-Taxable	Site Survey	1	\$55.00	YES	MI	\$55.00

1 - 1 of 1 Items Refresh

The Invoice is displayed in edit mode. Make the necessary changes, and when finished, click the **Save** button at the upper right of the page.

Manual Invoice 21448

Emily Wood #3719-01 Emily Wood - 45722 Chandler

Invoice Amount: \$58.30
Balance Due: \$58.30
0 Payments = \$0.00
0 Credits = \$0.00

Site: #3719-01 Emily Wood
Billing Address: 45722 Chandler
Warehouse:
Category: 400 SVC
Sales Tax: MI
COGS Account:
PO Number: 84412
Term: Due on Receipt
Invoice Date: 3/22/2022
Salesperson: Kathy Ackerman
Due Date: 3/22/2022
Delivery Method: Print
Contact: Emily Wood
Sales Package:
Save Cancel

Items: 1

Item Part Code	Item Description	Qty	Rate	Taxable	Sales Tax Code	Amount			
Service Fee-Taxable	Site Survey	1	\$55.00	YES	MI	\$55.00			Site

1 - 1 of 1 Items