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.

Customers Sites Systems											
Search Customers	Add Customer	Export to Excel			Master Cus	tomers NO Te	erminated Customers	Custom Grid Layout			
Drag a column header and drop it here to group by that column											
Customer #↓ :	Name	÷	Address	:	City :	State :	Balance Due	Total RMR			
3654	Holmes Fans		10556 Washington Street		Chagrin Falls	он	\$0.00	\$0.00			
3652	Cactus World		3601 Saguaro Street		Tucson	AZ	\$0.00	\$0.00			
3505	Smith, Aaron		123 Main St		Columbus	ОН	\$182.81	\$30.00			
3504	Allen Automotive Services		634 Morgan Street		Cincinnati	ОН	\$182.81	\$30.00			
3502	Tesay		Address1		City	ОН	\$0.00	\$0.00			
3499	Edwards Security		345 Main Street		Columbus	ОН	\$221.47	\$55.00			
3498	Crafted Crates		233 Widmore Ave		Columbus	ОН	\$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.

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					Total Balanc		\$0				Plymou	Chandler th, MI 48170 58-4646			Salespersor Last Statemen	t	wn		
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	21448				Mar 22, 2022		Mar 22, 2022		84412		\$58.30			\$58.30		\$	Paylnv	pice	
	н 4	1	н														1-1of1	items 🕃	Refresh

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

< Manual Invoice 214	48				\$ Make a Payr	nent	Deliver	🧨 Edit	ž≣ Tasks	History	More	
Emily Wood V #3719-01 Emily Wood - 45722 Chandler												
Invoice Amount \$58.50 • 0 Payments = \$0.00 • 0 Credits = \$0.00	Estance Due \$58.50 • Due today	1	Category PO Number Work Order Invoice Date Due Date Contact Billing Address	400 SVC 84412 - March 22, Emily Woo 45722 Ch	, 2022 od		Deliv Original	Term alesperson	MI - 6.0000% Due on Receipt Kathy Ackerman Print - None			
Items Parts Memo 1 0	Payments Credits Tax 0 0	Emails General Ledger	Part Ledger									
Export to Excel										Item \$5	55.00	
Item Part Code	Item Description				c	Dty	Rate	Taxable	Sales Tax Code	Amount		
 Emily Wood - 45722 Chandler, M 	н											
Service Fee-Taxable	Site Survey					1	\$55.00	YES	М	\$	\$55.00	
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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										🧭 Save	X Cancel	
Emily Wood V #3719-01 Emily Wood - 45722 Chandler												
Invoice Amount \$58.30 • 0 Payments = \$0.00 • 0 Credits = \$0.00	Balance Due \$58.30 • Due today	100%	Site - Category PO Number Invoice Date - Due Date Contact	#3719-01 Emily V 400 SVC 84412 3/22/2022 3/22/2022 Emily Wood	Nood - V	Billing Address Sales Tax Term Salesperson Delivery Method Sales Package	• Due on Re	veceipt v	Warehouse COGS Account		•	
1 Parts Memo 0 + Add Items											Items \$55.00	
Item Part Code	Item Description				Qty	Rate	Taxable	Sales Tax Code	Amount			
Emily Wood - 45722 Chandler, MI												
Service Fee-Taxable	Site Survey				1	\$55.00	YES	MI	\$55.00	î (6 Site	
H 4 1 > H										1	-1 of 1 items	