Edit Invoices

You can edit unpaid, paid, partially paid, and recurring invoices, as needed. Note that you must remove payments from paid or partially paid invoices before you can edit them. Click the links below to jump to a specific invoice type.

In this article:

- Edit Unpaid Invoices
- Edit Partially Paid or Paid Invoices
- Edit Recurring Invoices

Edit Unpaid Invoices

Editing unpaid invoices is relatively straightforward and does not require additional steps. You simply make changes to the invoice and provide the updated copy to the Payer.

1. From the menu to the left, click **Accounting**.

2. Click **Income**.

3. Enter your Accounting PIN and click **Go**.

   > **Note:** If you do not have an Accounting PIN set, you are prompted to set one.

4. Use filters to locate the invoice to change.

5. Click the invoice to update. The View Invoice page opens.

6. Click the **Invoice Actions** drop-down menu and select **Edit Invoice**. The Edit Invoice page opens.

7. Make changes, as needed. For details, see **Create an Invoice**.

8. When finished, click **Update.** The Preview Invoice page opens.

9. Review the updated invoice details and make changes to the email (to the right), as needed.

10. Click **Re-Send Invoice**. The updated invoice is emailed to the Payer.

Return to Top

Edit Partially Paid or Paid Invoices

If you have recorded a payment on an invoice, you must first delete payments from it before you can change it. When you delete payments, the paid amount is automatically recorded on the Payer account as an account credit that can be applied towards the update invoice/future invoices. You can also record a refund instead. See **Record Refunds** for more information.

1. From the menu to the left, click **Accounting**.

2. Click **Income**.

3. Enter your Accounting PIN and click **Go**.

> **Note:** If you do not have an Accounting PIN set, you are prompted to set one.

4. Use filters to locate the invoice to change.

5. Click the invoice to update. The View Invoice page opens. You must either record a refund or delete payments.

6. Click the **Invoice Actions** drop-down menu and select **Delete Payments**.

7. At the Are You Sure prompt, click **Delete**.

8. Click the **Invoice Actions** drop-down menu and select **Edit Invoice**. The Edit Invoice page opens.

9. Make changes, as needed. For details, see **Create an Invoice**.

10. When finished, click **Update.** The Preview Invoice page opens.

11. Review the updated invoice details and make changes to the email (to the right), as needed.

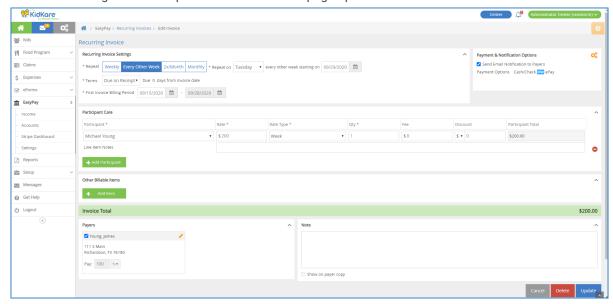12. Click **Re-Send Invoice**. The updated invoice is emailed to the Payer.

Return to Top

Edit Recurring Invoices

You can edit recurring invoices regardless of status.

1. From the menu to the left, click **Accounting**.

2. Click **Income**.

3. Enter your Accounting PIN and click **Go**.

> **Note:** If you do not have an Accounting PIN set, you are prompted to set one.

4. Click ▼ and select **Recurring Invoices**. The Recurring Invoices page opens.

5. Click the recurring invoice to update. The Edit Invoice page opens.

6. Make changes, as needed. For more information, see **Create Recurring Invoices**.

7. Click **Update**.

Note: If the recurring invoice you changed is at Draft status, click **Create**. This saves your changes and moves the recurring invoice to Active status.