

Edit Invoices

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CST

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.

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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.

Participant *	Rate *	Rate Type *	Qty *	Fee	Discount	Participant Total
Baby Carrot	\$15.3	Hour	43	\$0	\$ 0	\$657.90

7. Make changes, as needed. For details, see [Create Invoices](#).
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.

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**.

The screenshot displays the 'View Invoice' page in the EasyPay system. On the left, a sidebar menu shows 'EasyPay' > 'Invoices' > 'View Invoice'. The main content area shows 'Invoice Details - Invoice #10038' for 'Little Rainstorms'. A green 'Paid' banner is visible. The invoice is for 'Keith Test' and 'IEFFExy/Test KSarg'. The invoice date is 09/28/2020, and the terms are 'Due on Receipt'. The payment method is 'Cash/Check'. The invoice summary shows a total of \$962.50, with a balance due of \$0.00. A table below the summary shows the payment amount of \$962.50 on 09/28/2020 via Cash.

PARTICIPANT	RATE	RATE TYPE	QTY	FEE	DISCOUNT	TOTAL
IEFFExy/Test KSarg	\$575.00	Week	2	\$100.00	25.00%	\$962.50
TOTAL						\$962.50
CREDIT APPLIED						\$0.00
PAYMENTS MADE						(-) \$962.50
BALANCE DUE						\$0.00
CREDIT BALANCE						\$100.00

DATE	PAYMENT AMOUNT	PAYMENT METHOD	BALANCE
09/28/2020	\$962.50	Cash	\$0.00

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 Invoices](#).
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.

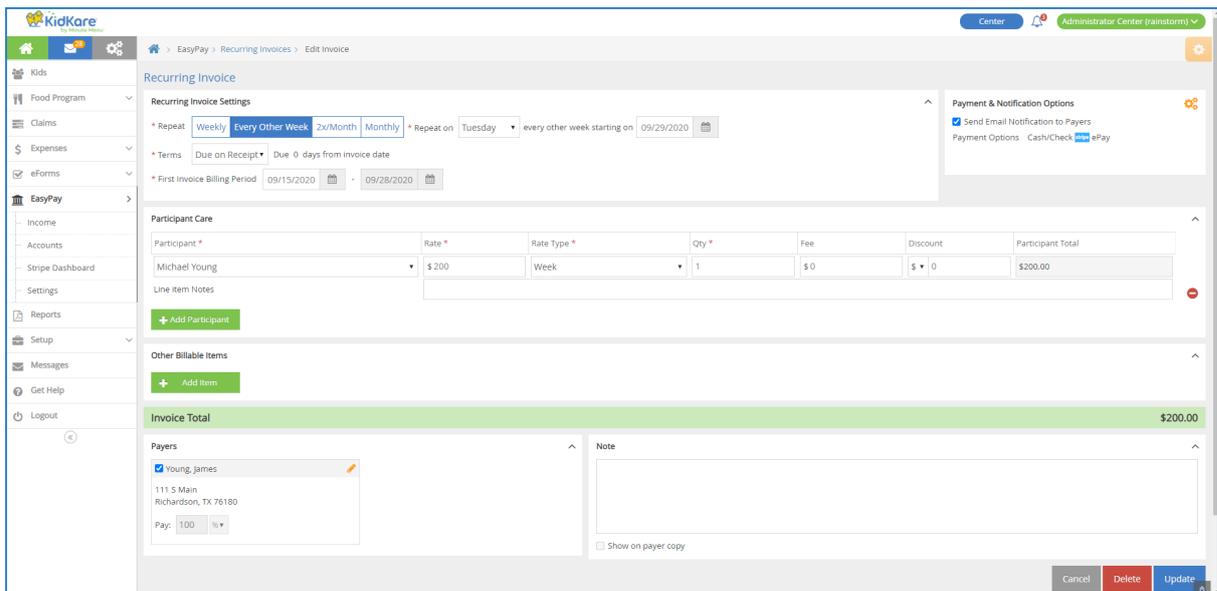
Edit Recurring Invoices

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.



The screenshot displays the 'Edit Invoice' interface for a recurring invoice. The left sidebar contains navigation options like Kids, Food Program, Claims, Expenses, eForms, EasyPay, Income, Accounts, Reports, Setup, Messages, Get Help, and Logout. The main content area is titled 'Recurring Invoice' and includes sections for 'Recurring Invoice Settings', 'Participant Care', 'Other Billable Items', 'Invoice Total', 'Payers', and 'Note'. The 'Recurring Invoice Settings' section shows repeat frequency set to 'Every Other Week', repeating on 'Tuesday', and starting on '09/29/2020'. The 'Participant Care' section features a table with one entry for 'Michael Young' with a rate of '\$200' and a total of '\$200.00'. The 'Invoice Total' is displayed as '\$200.00'. The 'Payers' section lists 'Young, James' with a 100% payment rate. The 'Note' field is currently empty.

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.

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