# **Knowledge Base**



#### Introduction

**Note:** Invoices that have a payment against them cannot be edited or voided unless the payment is firstly removed from the Invoice. This is a restriction from the Xero system. Refer to this link for more information on removing payments.

To get started, navigate to either the job invoices page (refer to the Job Actions section for more information) or to the Reports > Invoices page from the top navigation menu.

### **Editing Draft Invoices**

• From the list of invoices, click on any draft invoice in the list and the invoice edit page will open.



Note, when clicking on the row from the list to open the edit page, you can click on any column
where there is not a link, i.e. do not click on the PDF link, the Xero link or the Job Link
(Reports>Invoices page) if you want to open the edit page. You will see the following screen when
you open the draft invoice for editing:



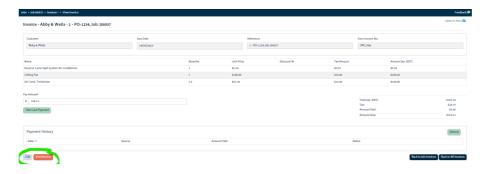
• From this screen, make any changes required. You then have the option to Approve, Save, Delete or Cancel. Refer to Create Invoices for more information on these options.

## **Editing Approved Invoices**

From the list of invoices, click on any approved invoice in the list and the invoice edit page will
open.



Note, when clicking on the row from the list to open the edit page, you can click on any column
where there is not a link, i.e. do not click on the PDF link, the Xero link or the Job Link
(Reports>Invoices page) if you want to open the edit page. You will see the following screen when
you open the draft invoice for editing:



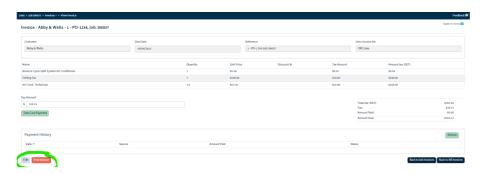
• Click on the Edit button to open the edit screen for the approved invoice:



 Make the required changes and then hit Save. This will update the approved invoice in both Gojee and Xero.

#### **Voiding Approved Invoices**

• From the list of invoices, click on any approved invoice in the list and the invoice edit page will open.



• Click on the Void Invoice button. The invoice will be marked as voided in both Xero and Gojee. The Invoice will still be visible in Gojee against the job, but the invoice amount will not contribute to any job totals.



Next: Take Payment for an Invoice.