

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.

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**.

Invoice Details - Invoice #10038

Little Rainstorms
1212 Loop Twelve
Dallas, TX 75080
Tax ID:

Billed To:
Keith Test
1101 East Arapaho Road
Dubliss, OH 45121

Invoice Date: 09/28/2020
Terms: Due on Receipt
Billing Period: 09/28/2020 - 10/09/2020
Payment Options: Cash/Check ePay

PARTICIPANT	RATE	RATE TYPE	QTY	FEE	DISCOUNT	TOTAL
IEFFxyTest 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

NOTES:
How are you liking EasyPay?

Payment Summary

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.

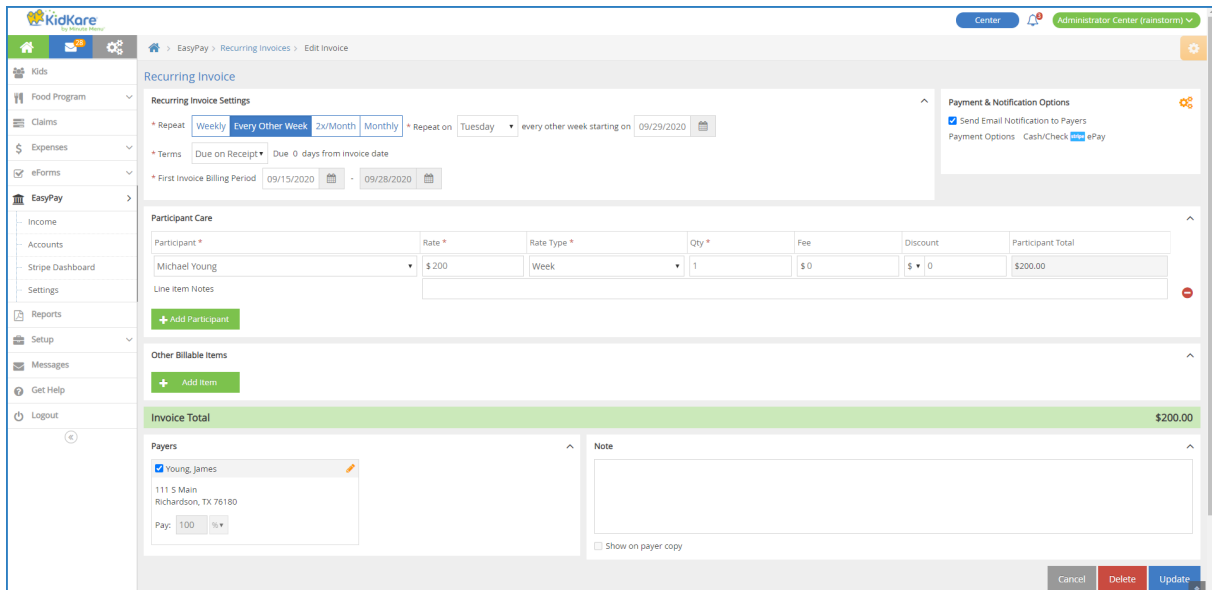
Edit Recurring Invoices

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 shows the 'Edit Invoice' page in the KidKare system. The left sidebar contains a navigation menu with categories like Kids, Food Program, Claims, Expenses, eForms, and EasyPay. The main content area is titled 'Recurring Invoice' and includes sections for 'Recurring Invoice Settings', 'Participant Care', 'Other Billable Items', and 'Invoice Total'. The 'Recurring Invoice Settings' section has tabs for 'Weekly', 'Every Other Week', '2x/Month', and 'Monthly', with 'Every Other Week' selected. It also shows repeat frequency, terms, and first invoice billing period. The 'Participant Care' section displays a table with columns for Participant, Rate, Rate Type, Qty, Fee, Discount, and Participant Total. The 'Invoice Total' section shows a total of \$200.00. At the bottom, there are fields for Payers and a Note, along with 'Cancel', 'Delete', and 'Update' buttons.

Participant *	Rate *	Rate Type *	Qty *	Fee	Discount	Participant Total
Michael Young	\$ 200	Week	1	\$ 0	\$ 0	\$200.00

Invoice Total	
	\$200.00

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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