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# Invoice Editor User Guide

Last Modified: January, 2025  
Revision Number: 2

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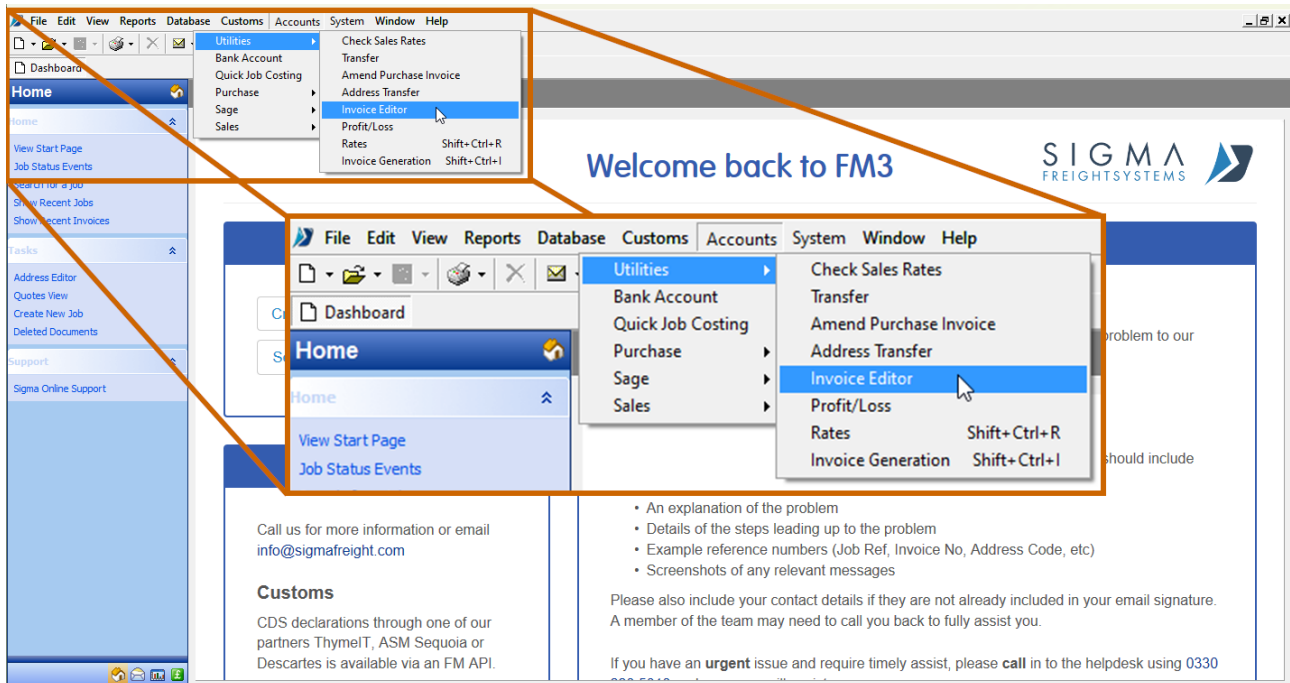
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# INVOICE EDITOR

On occasions, it is necessary to change a raised invoice. For this, we have provided a utility form to change invoice details and/or transaction (costings) line details.

To access this form: *FM Menu bar > Accounts > Utilities > Invoice Editor*



Dashboard > Accounts > Utilities > Invoice Editor

If you cannot see this option you may need to find someone with ADMIN access to do the changes required.

You will initially be presented with a blank form where you will need to enter the correct

**Invoice Type, Address Code and Invoice number:**

To see the rest of this form you will have to enter a valid **Invoice type, Address Code and Invoice number** and then press the 'Find Invoice' button.

## Invoice Header tab

**Invoice Editor**  
You may amend certain details of the "actual" invoice, but not all. If an invoice is raised in error, you may be best served to Credit it, and create a new one.

Type: Invoice AddressCode: CUPPB Invoice Number: INV000001 Batch: SLS000001 Date: 13/05/2022 Folio Number:   
Find Invoice

Header Details | Line Details

**Invoice Details**  
Address Code: CUPPB  
Invoice Date: 13/05/2022  
Type: Invoice Folio Number:   
Invoice Currency: GBP UNITED KINGDOM

**Batch Select**  
☒ Keep in Current batch SLS000001  
☐ Add to a new batch SLS000003  
☐ Add to an existing batch SLS000002

**Batch Details**  
 Batch Number: SLS000001  
 Items in batch: 4  
 Date Created: 13/05/2022 09:45:22  
 Created by: ADMIN  
 Home Amount: 39

Close

Invoice Editor > Header Details Tab

On the **Invoice header**, you are allowed to change the **Address Code**, **Invoice date** and **Invoice currency**. You can also **change the batch** that the invoice belongs to or move it to a new batch.

You can also change the invoice number if it is a purchase invoice.

Please note: If the batch is closed or already transferred to a third-party accounts package, you will get an appropriate warning message but can still proceed. It is presumed that whoever is using this utility form also has the access and knowledge to change the third-party accounts software to match the changes here and keep everything in step.

## Line Details tab

**Invoice Editor**  
You may amend certain details of the "actual" invoice, but not all. If an invoice is raised in error, you may be best served to Credit it, and create a new one.

Type: Invoice AddressCode: CUPPB Invoice Number: INV000001 Batch: SLS000001 Date: 13/05/2022 Folio Number:

Find Invoice

Header Details Line Details

Type: Invoice Invoice: INV000001

Invoice Amount: 0 GBP Original Value: 0 GBP Current value: 0 GBP  
Invoice Home Amount: 0 GBP

FileRef	ChgCode	ChgDesc	ChgAmount	ChgCurre	ChgROE	VatCode	VAT	Home Amount	Total	Charge Notes	InvCurre	InvAmount	HomeROE
AE000001	100	Airfreight	0.00	GBP	1.00	Z	0.00	0.00	0.00		GBP	0.00	1.00

Close

Invoice Editor &gt; Line Details Tab

By switching to the **Line Details tab** you will be able to **edit, add or delete costing lines** but please note that at least one costing line must be left against the invoice.

Any details changed, added or deleted here in the costings lines grid will result in the batch and costings total being updated.

## ADDITIONAL HELP

If you need additional guidance, please get in touch with us via email or telephone.

Tel: +44 (0) 330 223 5813

Email: [helpdesk@sigmafreight.com](mailto:helpdesk@sigmafreight.com)

Website: <https://www.sigmafreight.com/support/>