

Invoice Editor User Guide

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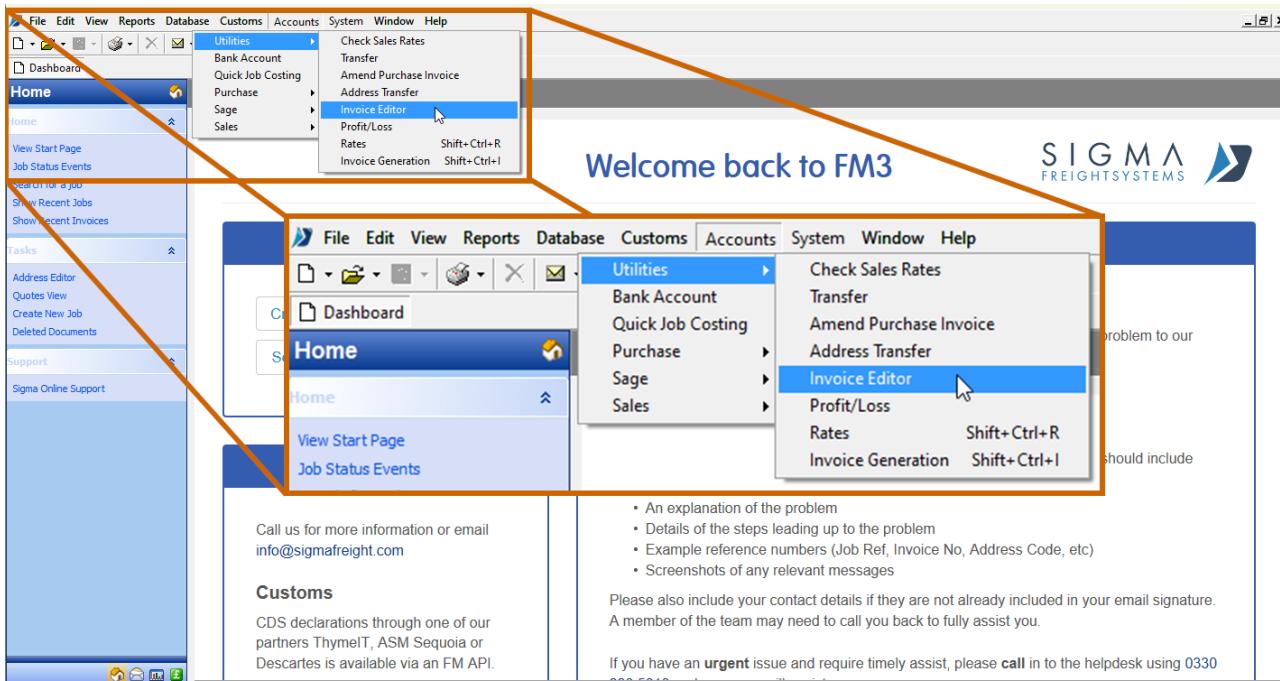
Table of Contents

| | |
|---------------------------------|----------|
| Invoice Editor | 3 |
| Invoice Header tab | 4 |
| Line Details tab | 5 |
| Additional Help | 5 |

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*

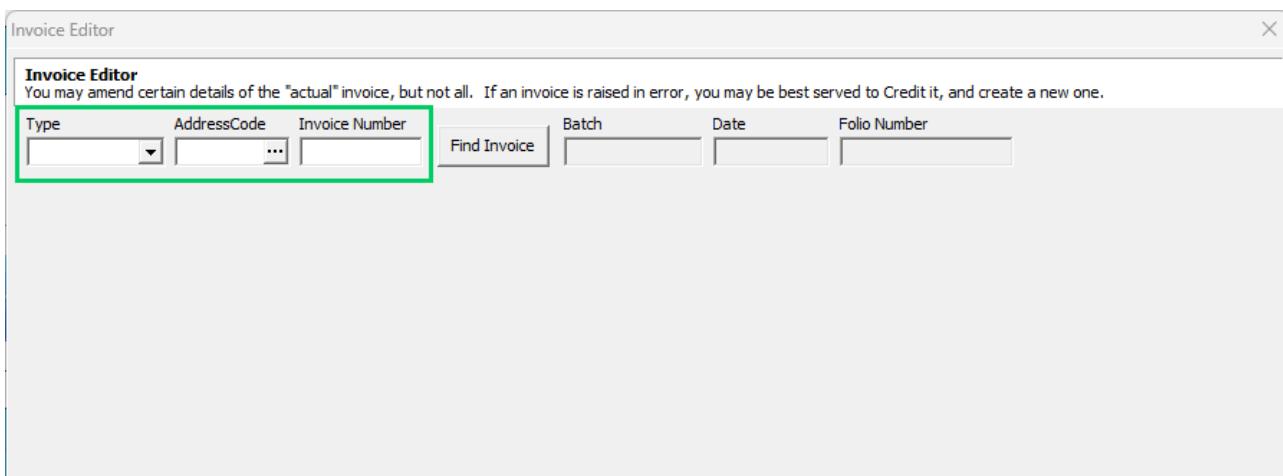


Dashboard > Accounts > Utilities > Invoice Editor

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

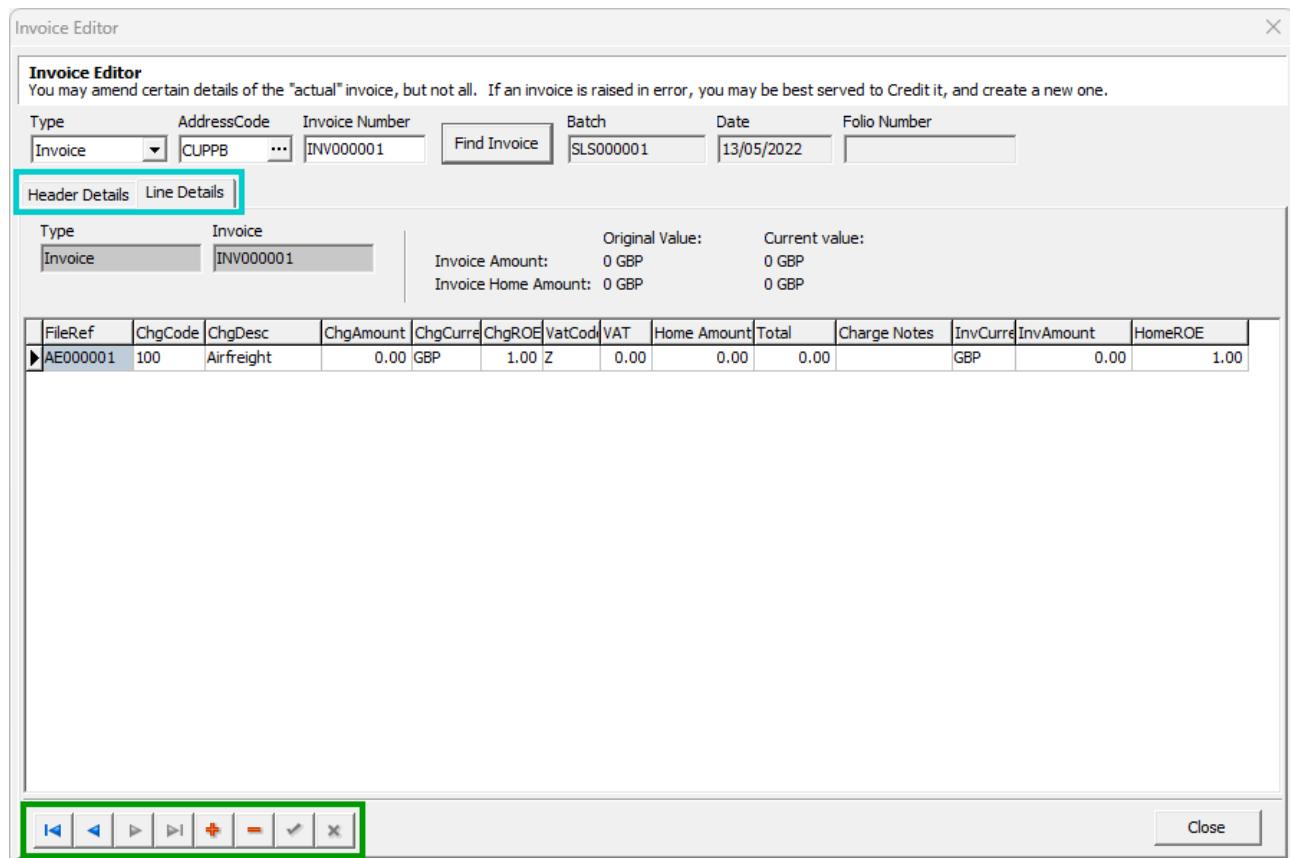
Invoice Editor > Header Details Tab

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 > 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.

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Email: helpdesk@sigmafreight.com

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