

# Expenses - Cancelling an Invoice and Updating the Description



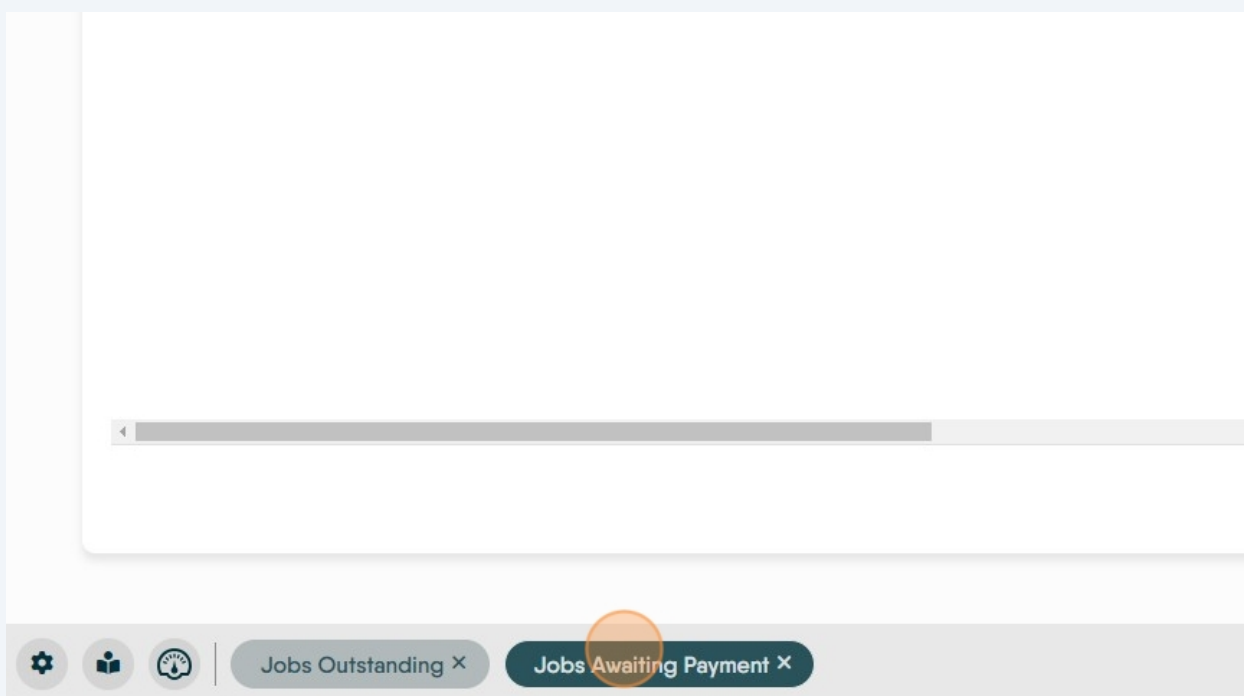
This guide provides a straightforward approach to cancelling an Expenses Invoice that has been charged to a Landlord and updating its description within the CRM system so the job can be re invoiced to the Landlord correctly.

- 1 Navigate to <https://crm.iamproperty.com/Dashboards/Accounts>

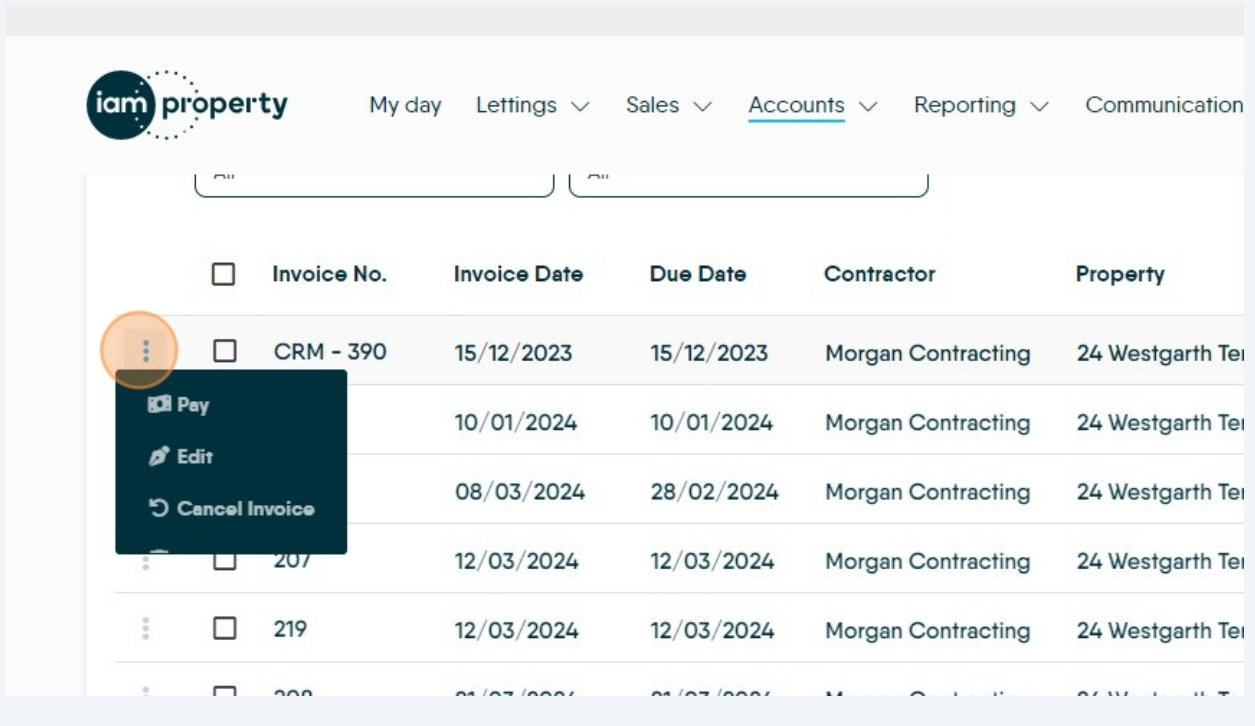


Alert! We are deleting and re invoicing an invoice raised in error. This should be a rare occurrence not a regular transaction.

- 2 Go to the Expenses tile, click the 3 line menu and select the Jobs Awaiting Payment option or if already open, pick from the tabs at the bottom of the screen.



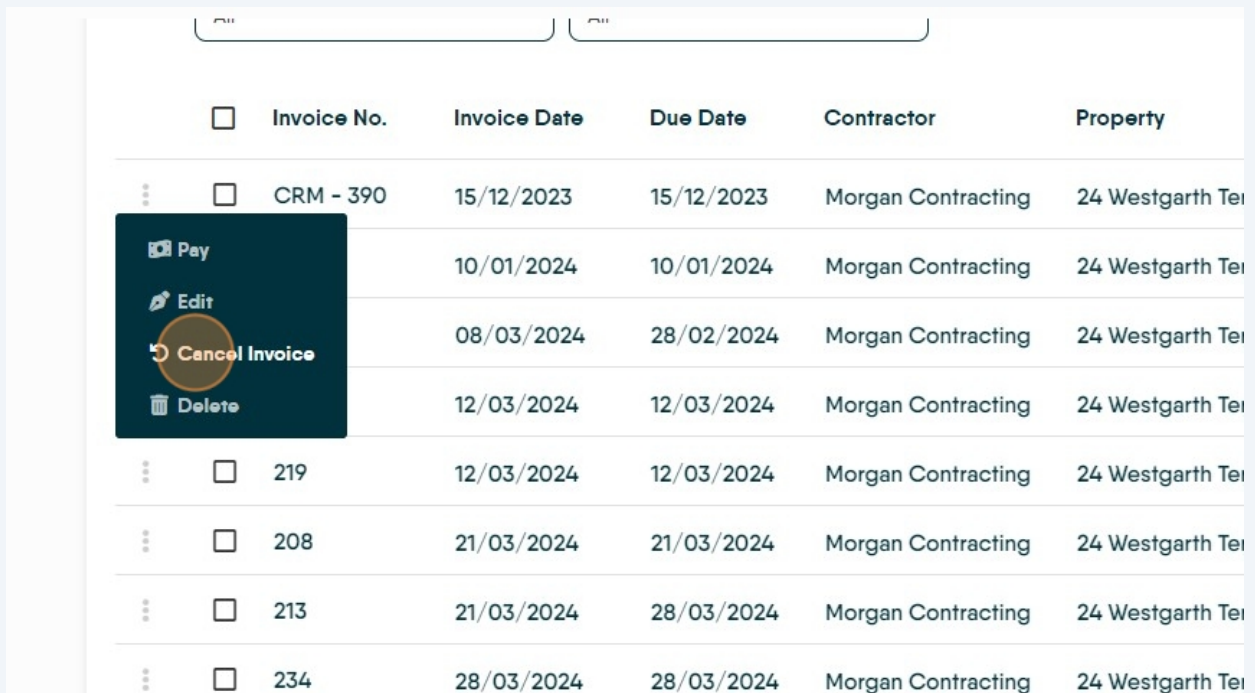
### 3 Click the 3 dot menu



The screenshot shows the 'iam property' interface with the 'Accounts' tab selected. A table lists invoices with columns: Invoice No., Invoice Date, Due Date, Contractor, and Property. A 3-dot menu is open for the first invoice (CRM - 390), showing options: Pay, Edit, and Cancel Invoice.

Invoice No.	Invoice Date	Due Date	Contractor	Property
CRM - 390	15/12/2023	15/12/2023	Morgan Contracting	24 Westgarth Ter
	10/01/2024	10/01/2024	Morgan Contracting	24 Westgarth Ter
	08/03/2024	28/02/2024	Morgan Contracting	24 Westgarth Ter
207	12/03/2024	12/03/2024	Morgan Contracting	24 Westgarth Ter
219	12/03/2024	12/03/2024	Morgan Contracting	24 Westgarth Ter
208	21/03/2024	21/03/2024	Morgan Contracting	24 Westgarth Ter
213	21/03/2024	28/03/2024	Morgan Contracting	24 Westgarth Ter
234	28/03/2024	28/03/2024	Morgan Contracting	24 Westgarth Ter

### 4 Click "Cancel Invoice"



The screenshot shows the same 'iam property' interface. The 3-dot menu for the first invoice is open, and the 'Cancel Invoice' option is highlighted with a red circle.

Invoice No.	Invoice Date	Due Date	Contractor	Property
CRM - 390	15/12/2023	15/12/2023	Morgan Contracting	24 Westgarth Ter
	10/01/2024	10/01/2024	Morgan Contracting	24 Westgarth Ter
	08/03/2024	28/02/2024	Morgan Contracting	24 Westgarth Ter
207	12/03/2024	12/03/2024	Morgan Contracting	24 Westgarth Ter
219	12/03/2024	12/03/2024	Morgan Contracting	24 Westgarth Ter
208	21/03/2024	21/03/2024	Morgan Contracting	24 Westgarth Ter
213	21/03/2024	28/03/2024	Morgan Contracting	24 Westgarth Ter
234	28/03/2024	28/03/2024	Morgan Contracting	24 Westgarth Ter

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Click "Confirm" this will cancel the charge to the Landlord and add the job to 'Jobs Outstanding' to be re charged to the Landlord.

15/12/2023	Morgan Contracting	24 Westgarth Terrace, Darlington	Radiators not heating up tested again
10/01/2024	Morgan Contracting	24 Westgarth Terrace, Darlington	Lounge lights not working
28/02/2024	Morgan Contracting	24 Westgarth Terrace, Darlington	ghjghjhg
12/03/2024			has no heating checked pressure
12/03/2024			Leaking radiator no heating
21/03/2024			cleaning
28/03/2024	Morgan Contracting	24 Westgarth Terrace, Darlington	notes field 1
28/03/2024	Morgan Contracting	24 Westgarth Terrace, Darlington	no heating
28/03/2024	Morgan Contracting	24 Westgarth Terrace, Darlington	Notes 1, created when the job is initial...
13/03/2024	Morgan Contracting	24 Westgarth Terrace, Darlington	leaky radiator in bathroom

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Click "Jobs Outstanding"

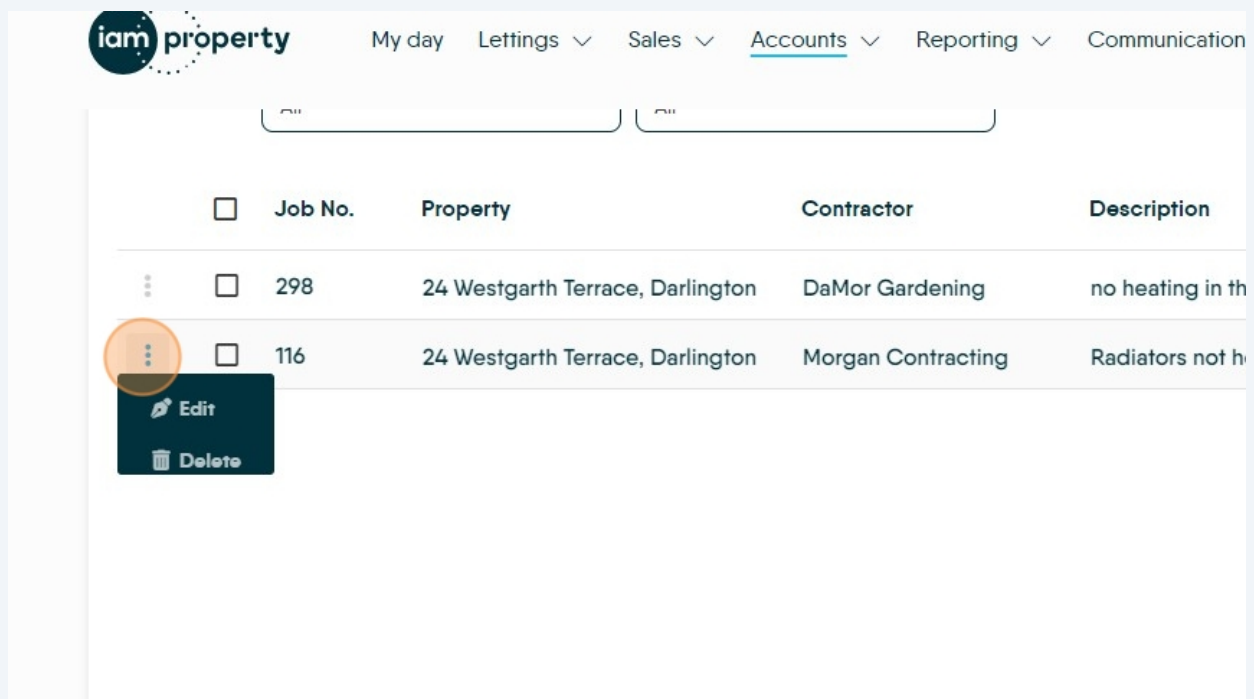
...	<input type="checkbox"/>	208	21/03/2024	21/03/2024	Morgan Contracting	24 Westgarth Terrace, Darlington
...	<input type="checkbox"/>	213	21/03/2024	28/03/2024	Morgan Contracting	24 Westgarth Terrace, Darlington
...	<input type="checkbox"/>	234	28/03/2024	28/03/2024	Morgan Contracting	24 Westgarth Terrace, Darlington
...	<input type="checkbox"/>	239	28/03/2024	28/03/2024	Morgan Contracting	24 Westgarth Terrace, Darlington
...	<input type="checkbox"/>	227	19/04/2024	13/03/2024	Morgan Contracting	24 Westgarth Terrace, Darlington
...	<input type="checkbox"/>	256	07/05/2024	13/05/2024	Morgan Contracting	Natwest 28 Mark



Jobs Outstanding X

Jobs Awaiting Payment X

7 Find and select the expense to be re invoiced to the Landlord.

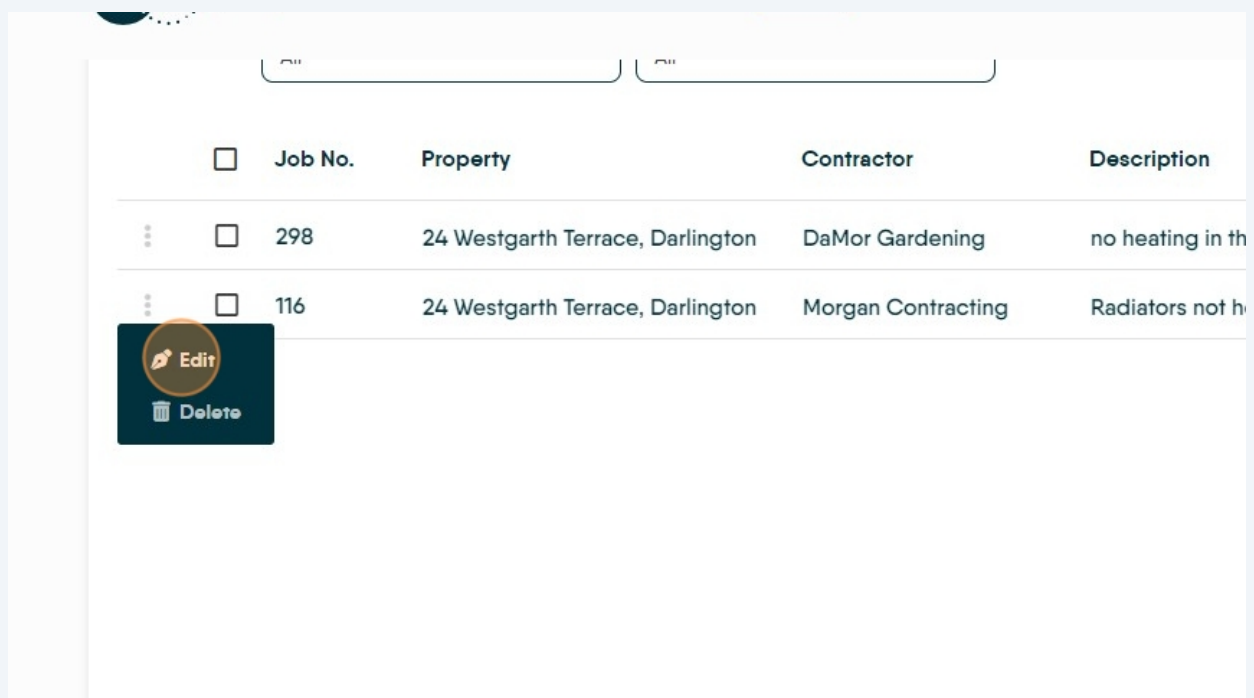


iam property My day Lettings Sales Accounts Reporting Communication

<input type="checkbox"/>	Job No.	Property	Contractor	Description
<input type="checkbox"/>	298	24 Westgarth Terrace, Darlington	DaMor Gardening	no heating in th
<input type="checkbox"/>	116	24 Westgarth Terrace, Darlington	Morgan Contracting	Radiators not h

Edit  
Delete

8 Click "Edit"



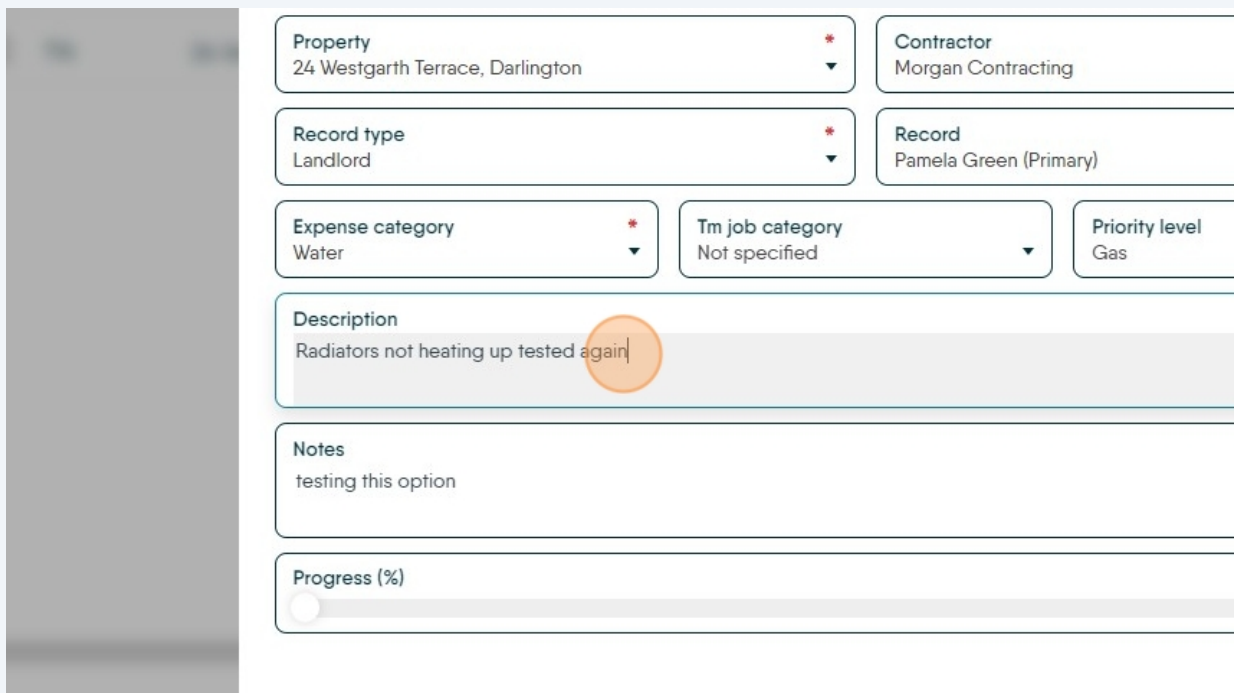
<input type="checkbox"/>	Job No.	Property	Contractor	Description
<input type="checkbox"/>	298	24 Westgarth Terrace, Darlington	DaMor Gardening	no heating in th
<input type="checkbox"/>	116	24 Westgarth Terrace, Darlington	Morgan Contracting	Radiators not h

Edit  
Delete

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If needed we can edit the description of the job. Other options can be edited in this screen as well.

Click the "Description" field. Add the new description.



The screenshot shows a web application interface for managing a job. On the left is a dark sidebar. The main content area contains a form with several sections:

- Property:** 24 Westgarth Terrace, Darlington (with a red asterisk and a dropdown arrow).
- Contractor:** Morgan Contracting.
- Record type:** Landlord (with a red asterisk and a dropdown arrow).
- Record:** Pamela Green (Primary).
- Expense category:** Water (with a red asterisk and a dropdown arrow).
- Tm job category:** Not specified (with a dropdown arrow).
- Priority level:** Gas.
- Description:** Radiators not heating up tested again (with an orange circle highlighting the text).
- Notes:** testing this option.
- Progress (%):** A progress bar with a slider handle.

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Navigate to the Payment tab and Invoice the job as usual

**11** Click "Save" to add the job to Jobs Awaiting Payment.

The screenshot shows a web application interface for managing jobs. At the top, there are four tabs: 'Details', 'Attachments', 'Info', and 'Payment'. The 'Details' tab is active. Below the tabs, the form is organized into several sections. The first section contains two dropdown menus: 'Property' (with the value '24 Westgarth Terrace, Darlington') and 'Contractor' (with the value 'Morgan Contracting'). The second section contains two more dropdown menus: 'Record type' (with the value 'Landlord') and 'Record' (with the value 'Pamela Green (Primary)'). The third section contains three dropdown menus: 'Expense category' (with the value 'Water'), 'Tm job category' (with the value 'Not specified'), and 'Priority level' (with the value 'Gas'). Below these is a text area for 'Description' with the placeholder text 'new description in here'. Underneath the description is a 'Notes' section with the text 'testing this option'. At the bottom of the form is a 'Progress (%)' section with a progress bar and the value '0 %'. At the very bottom of the form, there are four buttons: 'Cancel', 'Another', 'Save', and 'Save & pay now'. The 'Save' button is highlighted with an orange circle.

Details Attachments Info Payment

Property  
24 Westgarth Terrace, Darlington

Contractor  
Morgan Contracting

Record type  
Landlord

Record  
Pamela Green (Primary)

Expense category  
Water

Tm job category  
Not specified

Priority level  
Gas

Description  
new description in here

Notes  
testing this option

Progress (%) 0 %

Cancel Another Save Save & pay now