

Expenses - Cancelling an Invoice and Updating the Description



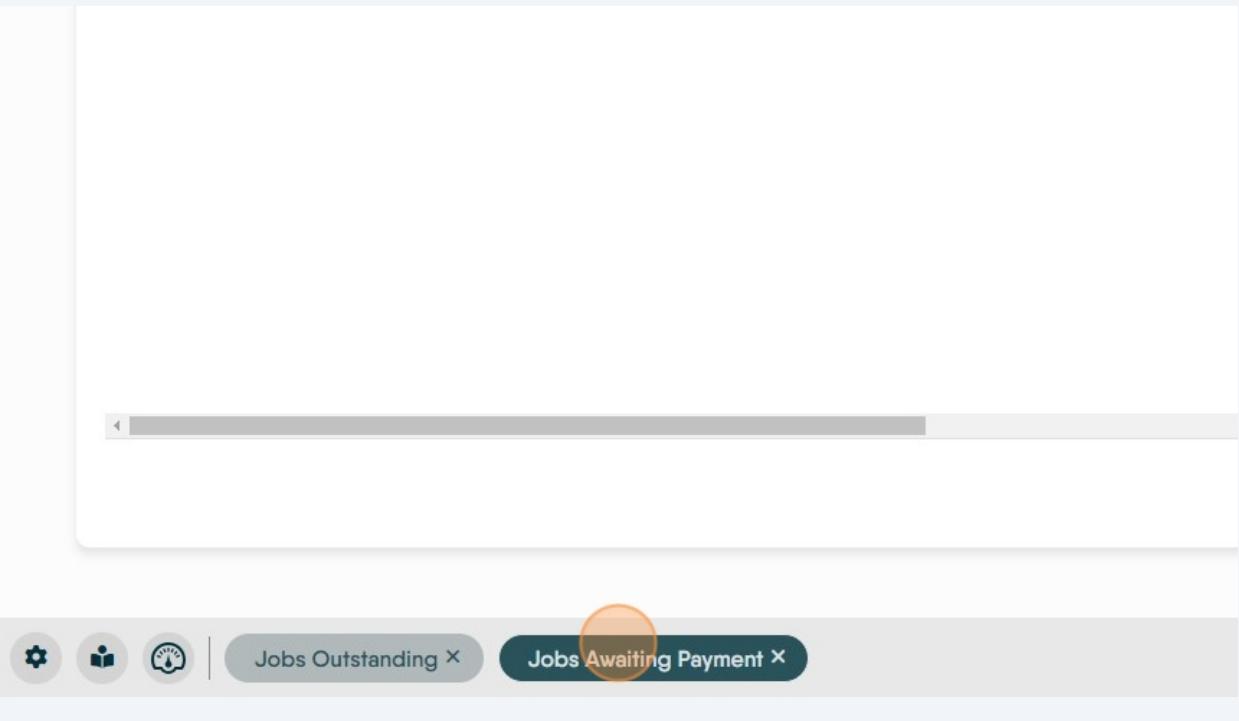
This guide provides a straightforward approach to cancelling an Expenses Invoice that has been charged to a Landlord and updating its description within the CRM system so the job can be re invoiced to the Landlord correctly.

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

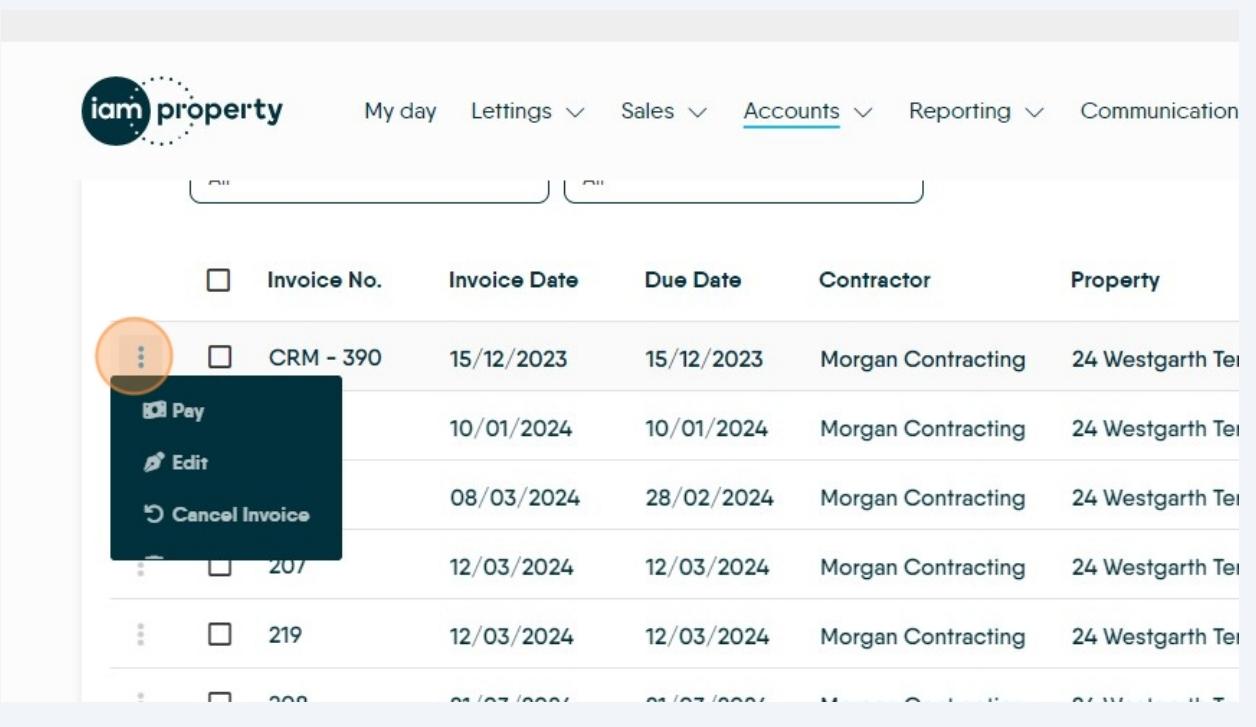


Alert! We are deleting and re invoicing an invoice raised in error. This should be a rare occurrence not a regular transaction.

- 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.

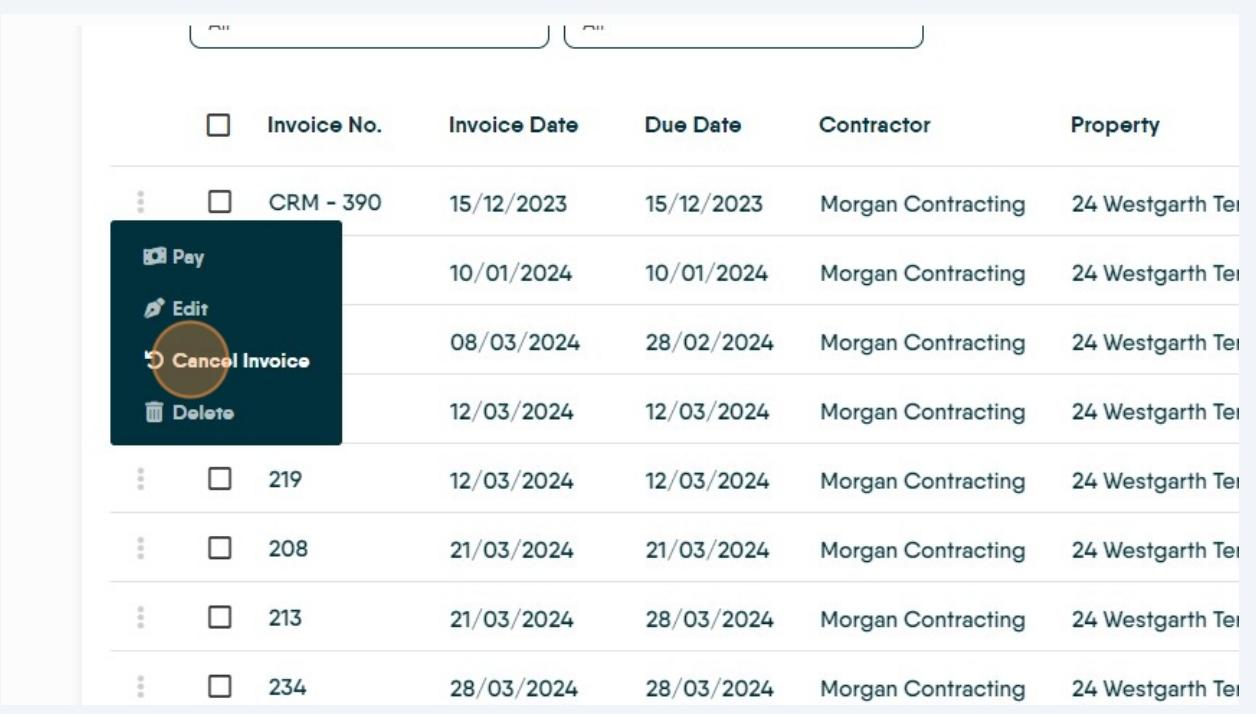


3 Click the 3 dot menu



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

4 Click "Cancel Invoice"



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

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

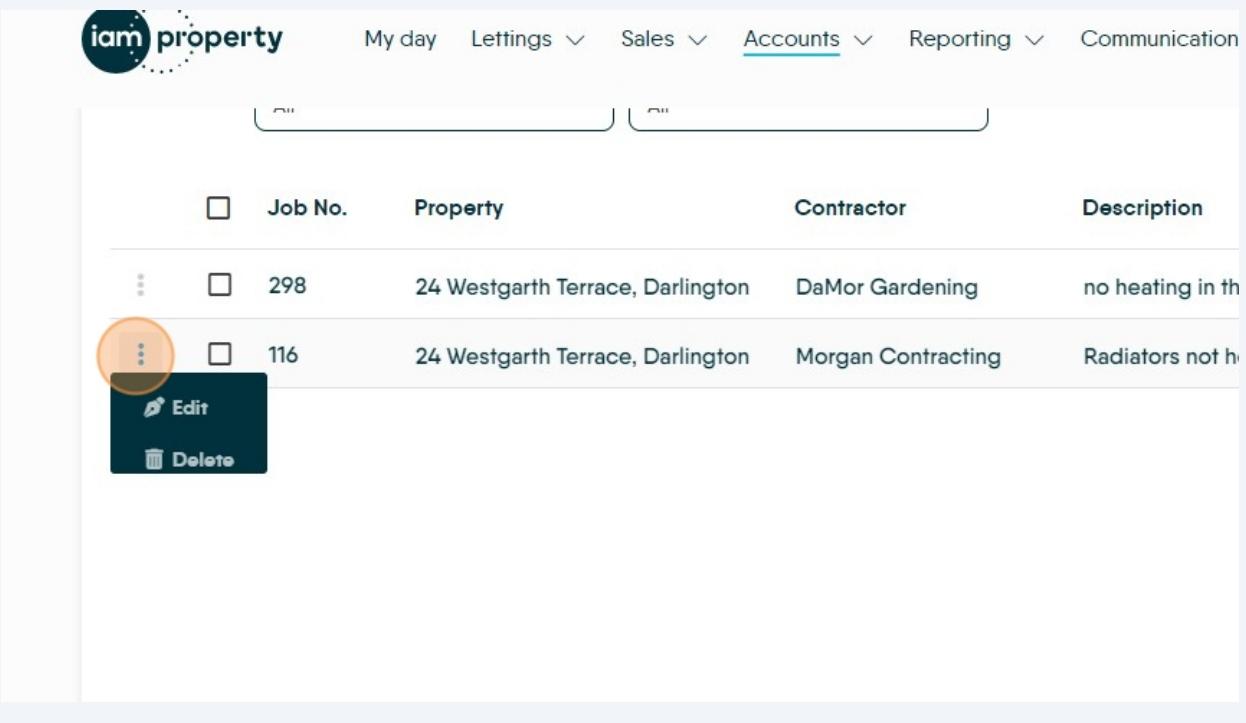
15/12/2023	Morgan Contracting	24 Westgarth Terrace, Darlington	Radiators not heating up tested again
10/01/2024	Morgan Contracting	24 Westgarth Terrace, Darlington	Lounge lights not working
28/02/2024	Morgan Contracting	24 Westgarth Terrace, Darlington	ghjghjhg
12/03/2024			has no heating checked pressure
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

6 Click "Jobs Outstanding"

...	<input type="checkbox"/>	208	21/03/2024	21/03/2024	Morgan Contracting	24 Westgarth Ter...
...	<input type="checkbox"/>	213	21/03/2024	28/03/2024	Morgan Contracting	24 Westgarth Ter...
...	<input type="checkbox"/>	234	28/03/2024	28/03/2024	Morgan Contracting	24 Westgarth Ter...
...	<input type="checkbox"/>	239	28/03/2024	28/03/2024	Morgan Contracting	24 Westgarth Ter...
...	<input type="checkbox"/>	227	19/04/2024	13/03/2024	Morgan Contracting	24 Westgarth Ter...
...	<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.



The screenshot shows a software interface for managing expenses. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts' (which is underlined, indicating it's the active tab), 'Reporting', and 'Communication'. Below the navigation is a search bar with two dropdown menus. The main content area is a table with the following columns: 'Job No.', 'Property', 'Contractor', and 'Description'. There are two rows of data. The second row (Job No. 116) has a context menu open, with the 'Edit' option highlighted and circled in orange. The 'Delete' option is also visible in the menu.

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

8 Click "Edit"

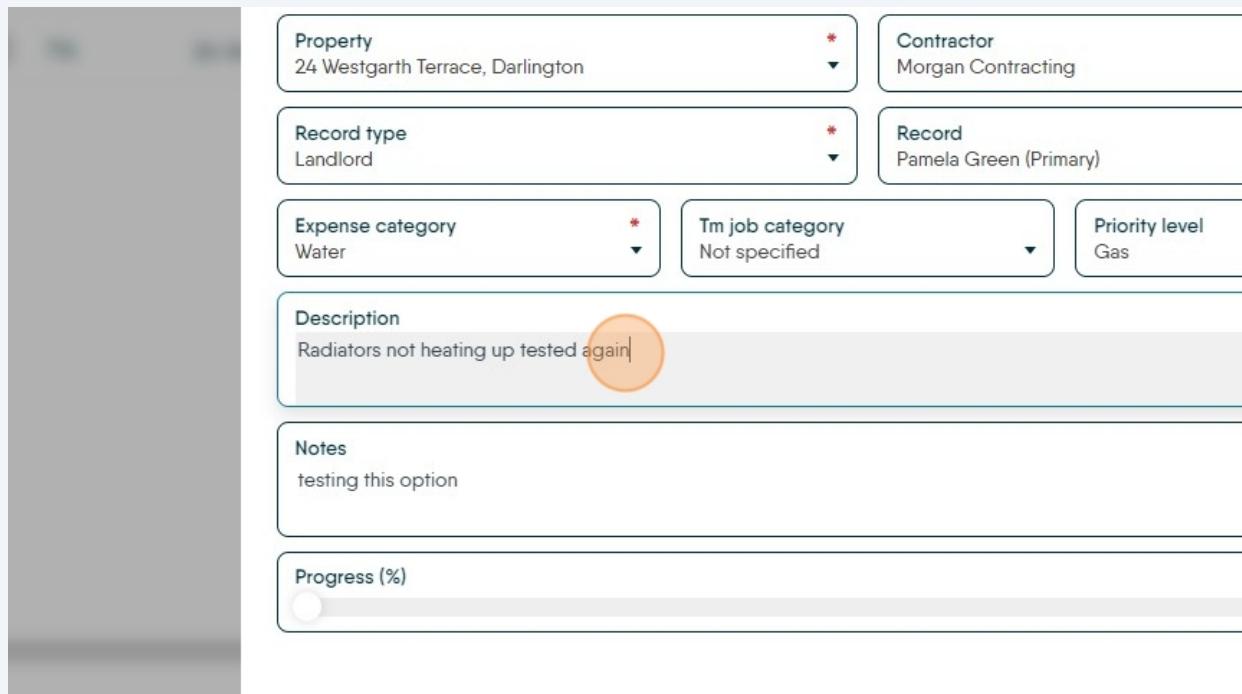


The screenshot shows the same software interface as the previous one, but with a slight difference. The context menu for the second expense (Job No. 116) is still open, and the 'Edit' option is still highlighted and circled in orange. The 'Delete' option is also visible in the menu.

9

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.



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 Radiators not heating up tested again		
Notes testing this option		
Progress (%)		

10

Navigate to the Payment tab and Invoice the job as usual

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

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