

Job Invoicing/Sales Summary Issues

04/14/2026 10:01 am EDT

Job Invoicing/Sales Summary issues

What types of issues are covered by this document:

- Customer says job invoices have an incorrect value and need to be changed.
- Customer says they need to make changes to the job to correct invoicing.
- Customer says the job wants to bill for an incorrect amount.
- Customer says the job sales summary is incorrect.
- Any type of issue related to changes needed to job install items, material lists, rmr, invoices, or sales summary.

Customer's often reach out regarding trouble with job billing. The specific scenario is often unique, but at its core the customer usually needs to change an existing job invoice, create a new job invoice for a different amount than the job currently wants to bill for, or fix the job sales summary.

Note that customers often say job billing is wrong when it doesn't match what they need it to be in the real world. This does not necessarily mean the job has a data error. The job may be billing correctly based on the information it was given, but the customer simply hasn't entered the correct information.

Our goal is not to try to force the job to bill the way the customer wants. Our goal is to address the customer's data entry issues so they can bill/rebill the job however they need to.

Each job billing issue is unique, but here are some common troubleshooting steps:

- If an existing invoice is wrong it cannot be fixed. It must be credited off in its entirety and a new invoice created for the correct amount. Partial credits create problems in the jobs sales summary and billing.
- Remember all job credits must be created through the job invoices screen, not the customer account, and they must be for the full amount of the invoice.
- If an invoice needs to be credited off but there is a payment on it, the payment must be removed first.
- Items that have already been billed cannot be edited, a locked job cannot be unlocked if it has already been billed. This does not mean the job billing values cannot be fixed, it just means change orders must be used to correct the amounts.
- If there is a problem with the job sales summary compare the job sales summary values to the actual billable amounts entered to the job, and actual invoice and credit amounts tied to the job. Do the math. The customer often says these values are incorrect when in fact they match the data that has been entered. If the sales summary truly does not match the actual billable amounts/invoice/credits then data work is needed to correct the sales summary. Data work would be performed on the sales summary itself, not the job billable items/invoices/credits.

Correcting job invoicing can be an in-depth process with many steps. It is okay to send a case to level 2 if you are unsure how to correct it. A job billing issue sent to level 2 may or may not require data work. Level 2 will help the customer

correct the job through the front end wherever possible.
