

How to Adjust Submitted Proposals and Invoices

Web Application

Adjustments might need to be made if the incorrect information was added or the PO/Invoice was rejected. An Invoice can be adjusted up until the Customer approval. A Proposal can be adjusted until it has been invoiced. See the following steps on how to make adjustments and resubmit the PO/Invoice.

Step 1

Locate the Proposal or Invoice


1. Navigate to your Manage Invoices or Proposals module.
2. Select the Invoice/Proposal ID or click “View Details”

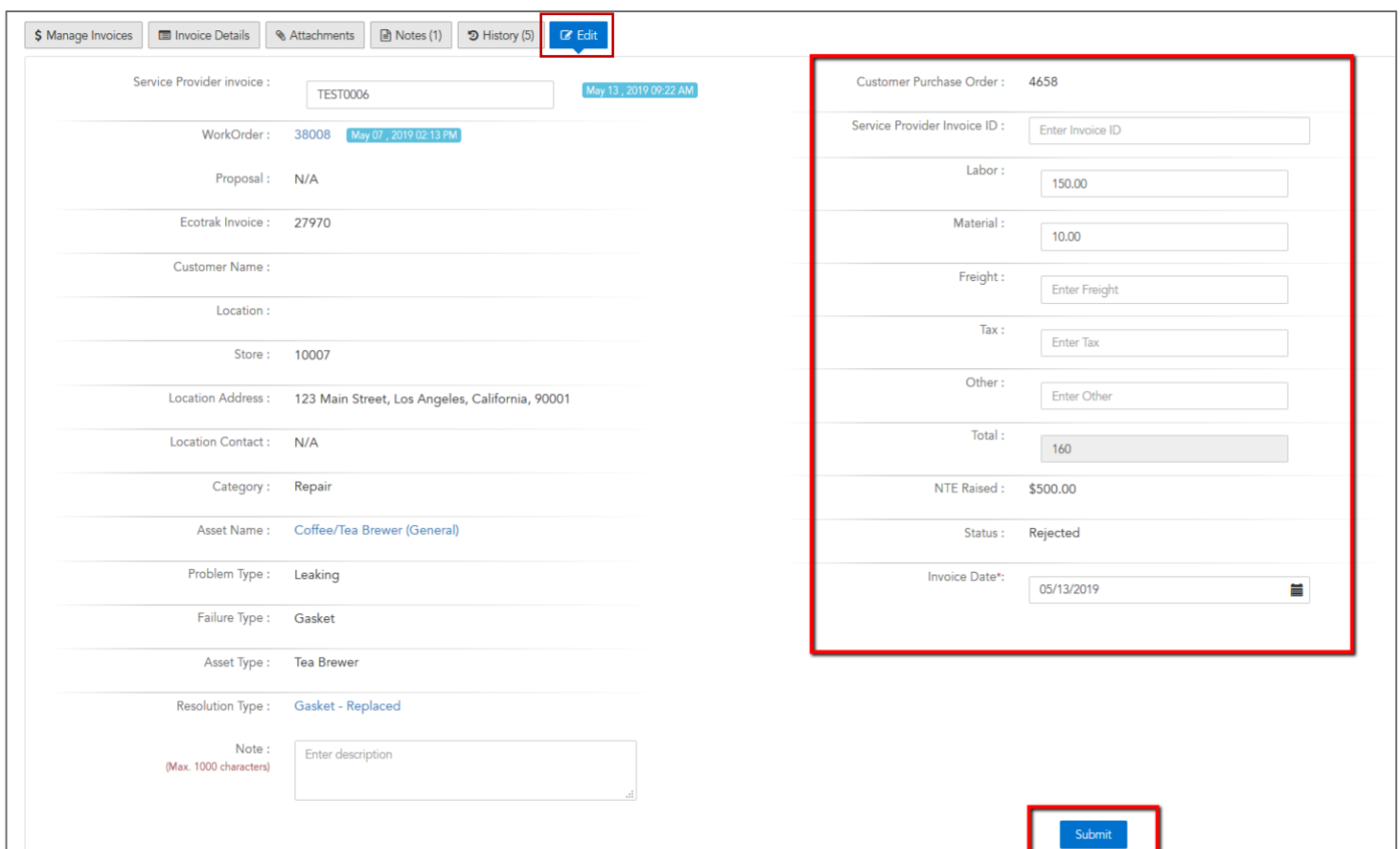


27539	37868	TEST123454
28250	38400	TEST0009
28080	38401	TEST0008
27971	38390	TEST0007

Step 2

Edit and Resubmit

1. Click the “Edit” button on the top right of the invoice page 
2. Once in edit mode, make changes to the costs as needed
3. Once the changes have been made click “Submit”
 - Note: You can also adjust the Invoice/Proposal attachment but inactivating the original attachment and uploading a new one



Service Provider invoice : TEST0006 May 13, 2019 09:22 AM

WorkOrder : 38008 May 07, 2019 02:13 PM

Proposal : N/A

Ecotrak Invoice : 27970

Customer Name :

Location :

Store : 10007

Location Address : 123 Main Street, Los Angeles, California, 90001

Location Contact : N/A

Category : Repair

Asset Name : Coffee/Tea Brewer (General)

Problem Type : Leaking

Failure Type : Gasket

Asset Type : Tea Brewer

Resolution Type : Gasket - Replaced

Note : (Max. 1000 characters)

Customer Purchase Order : 4658

Service Provider Invoice ID :

Labor :

Material :

Freight :

Tax :

Other :

Total :

NTE Raised : \$500.00

Status : Rejected

Invoice Date* :