

Enterprise - How to Recast an Invoice

Last Modified on 04/21/2021 12:47 pm CDT

What Does it Mean to Recast an Invoice?

Recasting an invoice will update any non financial data such as; department name, supervisor name, PO number (from assignment), cost center (from timecard), job title, employee name, report to, remit address, payment address, payment term code, due date, etc.

How to Recast an Invoice

Recast invoice example:

For example, in the invoice preview below, we can see that the invoice is addressed to: Leenane Manufacturing 4236 1st Ave. Eagan, MN 55121

Leenane Manufacturing (Primary)
4236 1st Ave. ID: 4295011181
Eagan, MN 55121
(651) 885-7444

Scheduled for: 02/17/2016
Daily Standup Meeting

tasks appointments social email

visifile
details
defaults
documents
integrations
invoice history
invoice details
invoice setup
evaluations
messages
payment history
tasks
search

employee
customer
order
assignment
contact
pay / bill
reports
hrcenter
all options

Report Viewer
Staffing Company 569 Staffing Street
AnyTown, USA 11236

INVOICE

| | | |
|---|---------------------------|---------------------------|
| Leenane Manufacturing 4236 1st Ave. Eagan, MN 55121 | Invoice Date 2/17/2016 | Invoice # 46547 |
| | Customer # 4295011181 | Invoice Amt \$4,223.20 |
| | PO Number | |

Terms: Payment Past Due 20 Days After Invoice Date:

| Employee | Description | Reg Hrs | Rate | OT Hrs | OT Rate | Total |
|------------------|------------------------|---------|---------|--------|---------|----------|
| | WeekendDate: 2/14/2016 | | | | | |
| Boone, Jim | Misc. Labor | 40.00 | \$13.59 | 0.00 | \$20.39 | \$543.60 |
| Cameron, Charles | Machine Operator | 40.00 | \$16.99 | 0.00 | \$25.48 | \$679.60 |
| Klay, Ariel | Misc. Labor | 40.00 | \$13.59 | 0.00 | \$20.39 | \$543.60 |
| Larson, Craig | Machine Operator | 40.00 | \$16.99 | 0.00 | \$25.48 | \$679.60 |

We then discover this is where their main office is located, but that invoices should be sent to: 2379 Hamilton Ave. Maplewood, MN 55109

Step 1: Correct the Information on the Customer/Order/Assignment

Based on our example above, we are going to update the billing address but you may need to add or update a PO number, department name, etc.

Navigate to the details page of the customer record, and update the billing address:

The screenshot shows a software interface for customer management. On the left is a navigation menu with 'details' selected. The main area is divided into three sections: 'customer information', 'contact information', and 'customer status'. The 'billing address' section is highlighted with a red box. It contains fields for Attention To, Street (2379 Hamilton Ave.), Street 2, City (Maplewood), State (MN), Zip (55109-___), and Country (United States of America).

| Section | Field | Value |
|----------------------|-----------------|--------------------------|
| customer information | Customer Name | Leenane Manufacturing |
| | Department | Primary |
| | Customer ID | 4295011181 |
| | Parent ID | |
| contact information | Street | 4236 1st Ave. |
| | Street 2 | |
| | City | Eagan |
| | State | MN |
| | Zip | 55121-___ |
| | Country | United States of America |
| customer status | Status | A Active |
| | Activation Date | 1/14/2016 |
| | Date Created | 1/14/2016 11:14:00 AM |
| billing address | Attention To | |
| | Street | 2379 Hamilton Ave. |
| | Street 2 | |
| | City | Maplewood |
| | State | MN |
| | Zip | 55109-___ |

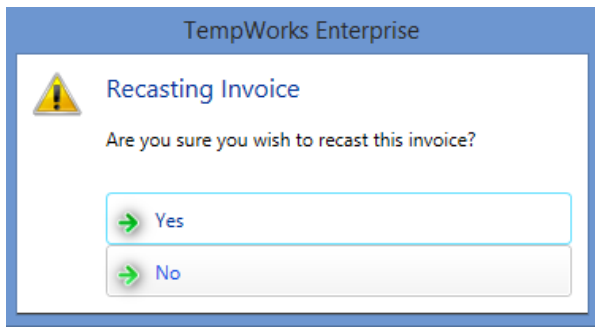
Step 2: Recast the Invoice

After saving changes, navigate back to the invoice details page of the invoice with the incorrect address. Once there, expand the actions menu and select to recast invoice.

The screenshot shows an invoice details page for 'Leenane Manufacturing (Primary)'. The header includes the company name, address (4236 1st Ave., Eagan, MN 55121), phone number ((651) 885-7444), and ID (4295011181). A search bar at the top contains 'Search for Employees, Customers, Orders, etc.'. The 'tasks' menu is open, and the 'Recast Invoice' option is highlighted with a red box. Other options include 'Edit Invoice', 'Recalculate Taxes/Surcharges', 'Void Invoice', 'Edit Invoice Header', 'Mark as Do Not Email', 'Merge Invoice', 'New Message', 'View Invoice Payments', 'Email Invoice', 'Preview Invoice', 'Print', and 'View Customer'. The invoice details show 'Scheduled for: 02/17/2016', 'Daily Standup Meeting', 'Invoice Number', 'Invoice Date 2/17', and 'Owed Balance \$4,223.20'. A table of items is visible with columns for 'item', 'quantity', and 'rate'. The 'Recast Invoice' option is highlighted with a red box.

| item | quantity | rate |
|-----------|----------|---------|
| Reg Hours | 40.00 | \$13.59 |
| Reg Hours | 40.00 | \$16.99 |
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| Reg Hours | 40.00 | \$16.99 |
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| Reg Hours | 40.00 | \$13.59 |
| Reg Hours | 40.00 | \$13.59 |

Upon selection, a recasting invoice window will immediately open asking you to confirm that you would like to recast this invoice. Select yes to proceed.



The invoice will immediately be updated to reflect the changes made to the address.

Leenane Manufacturing (Primary)
Scheduled for: 02/17/2016 Daily Standup Meeting

4236 1st Ave. ID: 4295011181
 Eagan, MN 55121
 (651) 885-7444

2379 Hamilton Ave.
 Maplewood, MN, 55109

Invoice Number 46547 Weekend Bill 2/14/2016
 Invoice Date 2/17/2016 Pay Date

visifile
 details
 defaults
 documents
 integrations
 invoice history
invoice detail
 invoice setup
 evaluations
 messages
 payment history
 tasks
 search

Leenane Manufacturing

Staffing Company 569 Staffing Street
AnyTown, USA 11236

Leenane Manufacturing
 2379 Hamilton Ave.
 Maplewood, MN 55109

INVOICE

| | | | |
|---------------------|------------|--------------------|------------|
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| Customer # | 4295011181 | Invoice Amt | \$4,223.20 |
| PO Number | | | |

Terms: Payment Past Due 20 Days After Invoice Date:

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