

## Ability to Modify Invoiced Jobs

<b>Prepared By:</b>	Rasiga Priya M
<b>Designed By:</b>	Aneeshwaran
<b>Feature requested by:</b>	Ramya Krishnan, Preetha
<b>Stakeholder:</b>	Channel blinds
<b>Ticket ID:</b>	#REQ-I2022
<b>Date:</b>	NOV 13, 2025

**Prototype:**

[Figma Link](#)

## 1. Overview

This feature provides administrators the ability to control whether a user can edit job and price-related details **after a job has been invoiced, and payment has been allocated**. This is applicable for split invoicing as well.

## Permission Setting

Located under: **Settings** → **User & Roles** → **Permission Level**

**Permission Name:** *Edit Job After Invoicing with a tooltip*

**Values:** Enable / Disable

Settings > User & roles > Permission level

Search

Permission level name: **Manager** Description: Sample description Default opening module: Dashboard

Section	Toggle	Permissions
Job section	<input checked="" type="checkbox"/>	Full access
Contact info	<input type="checkbox"/>	View, Create, Edit, Delete
Tasks	<input type="checkbox"/>	View, Create, Edit, Delete
Check list	<input type="checkbox"/>	View, Create
Reports access	<input type="checkbox"/>	Full access
Search fields filter	<input type="checkbox"/>	All accounts, Assigned accou...
Appointments	<input type="checkbox"/>	View, Create, Edit, Delete
Payments	<input type="checkbox"/>	View, Create, Edit, Delete
Terms and Conditions	<input type="checkbox"/>	View, Create, Edit, delete
Multi-contact	<input type="checkbox"/>	View, Create, Edit, delete
Price details	<input checked="" type="checkbox"/>	Full access
Total cost price	<input type="checkbox"/>	View, Edit
Delivery cost	<input type="checkbox"/>	View, Edit
List net price	<input type="checkbox"/>	View
Gross price	<input type="checkbox"/>	View, Edit
Total paid	<input type="checkbox"/>	View
Amount outstanding	<input type="checkbox"/>	View

Enables price-related changes even after invoicing and payment allocation

Save Cancel

Settings > User & roles > Permission level

Search

Permission level name: **Manager** Description: Sample description Default opening module: Dashboard

Section	Toggle	Permissions
Job section	<input checked="" type="checkbox"/>	Full access
Contact info	<input type="checkbox"/>	View, Create, Edit, Delete
Tasks	<input type="checkbox"/>	View, Create, Edit, Delete
Check list	<input type="checkbox"/>	View, Create
Reports access	<input type="checkbox"/>	Full access
Search fields filter	<input type="checkbox"/>	All accounts, Assigned accou...
Appointments	<input type="checkbox"/>	View, Create, Edit, Delete
Payments	<input type="checkbox"/>	View, Create, Edit, Delete
Terms and Conditions	<input type="checkbox"/>	View, Create, Edit, delete
Multi-contact	<input type="checkbox"/>	View, Create, Edit, delete
Price details	<input checked="" type="checkbox"/>	Full access
Total cost price	<input type="checkbox"/>	View, Edit
Delivery cost	<input type="checkbox"/>	View, Edit
List net price	<input type="checkbox"/>	View
Gross price	<input type="checkbox"/>	View, Edit
Total paid	<input type="checkbox"/>	View
Amount outstanding	<input type="checkbox"/>	View

Edit job after invoicing ⓘ

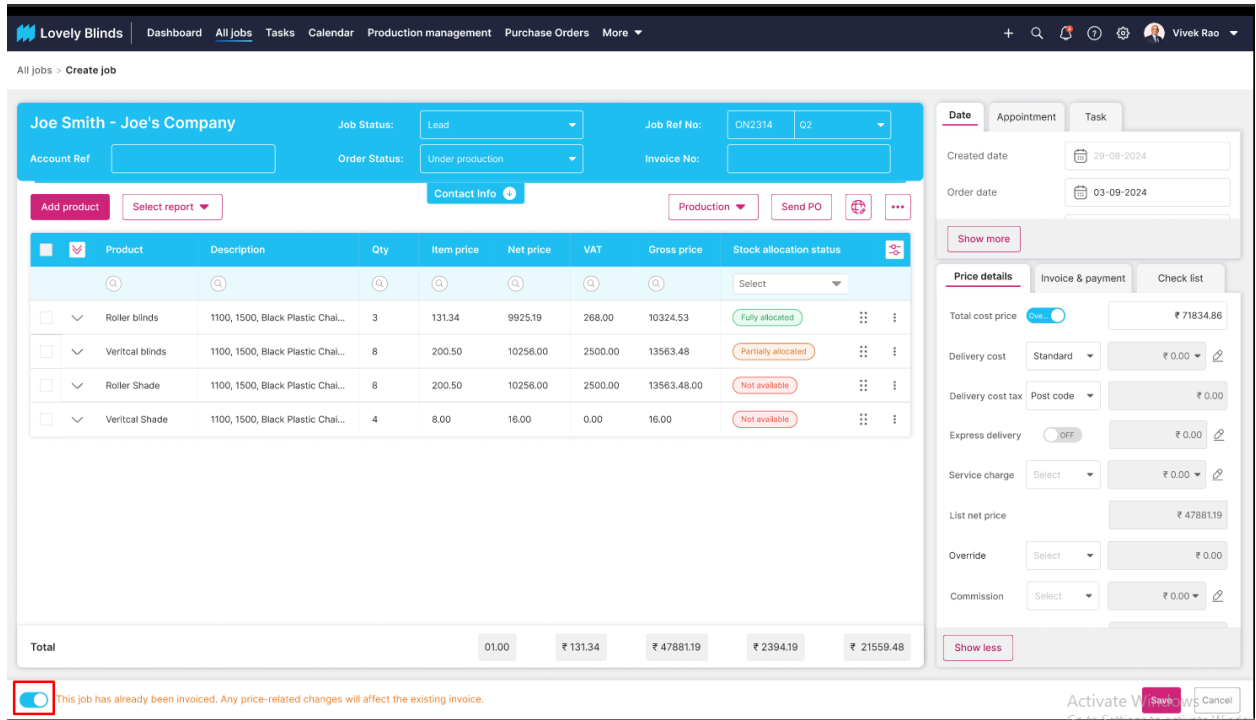
Enable Disable

Save Cancel

- **If Enabled:**

- New toggle appears inside the job screen *Allow editing this job after invoicing*
- Toggle is active only for users with permission.

- On enabling, the job becomes fully editable despite invoicing and payment allocation.
- **If Disable:**
  - Toggle is visible but disabled (greyed out).
  - Job stays locked after invoicing/payment allocation. (Existing functionality)



**Joe Smith - Joe's Company**

Job Status: Lead Job Ref No: ON2314 Q2

Account Ref:  Order Status: Under production Invoice No:

Product	Description	Qty	Item price	Net price	VAT	Gross price	Stock allocation status
Roller blinds	1100, 1500, Black Plastic Chal...	3	131.34	9925.19	268.00	10324.53	Fully allocated
Vertical blinds	1100, 1500, Black Plastic Chal...	8	200.50	10256.00	2500.00	13563.48	Partially allocated
Roller Shade	1100, 1500, Black Plastic Chal...	8	200.50	10256.00	2500.00	13563.48.00	Not available
Vertical Shade	1100, 1500, Black Plastic Chal...	4	8.00	16.00	0.00	16.00	Not available

**Total** 01.00 ₹ 131.34 ₹ 47881.19 ₹ 2394.19 ₹ 21559.48

This job has already been invoiced. Any price-related changes will affect the existing invoice.

## Job Page Behavior

By default, the toggle on the job page will remain off. Users with the required permission can turn it on to edit the job.

### When Permission is Enabled

- After invoicing:
  - All editable fields become active once the toggle is ON.
  - Items can be added/removed.

- Item price, product quantity, surcharge, VAT, and discounts become editable.
- Payments and invoices remain unchanged unless a re-invoice is carried out.
- Footer message remains:
 

*“This job has already been invoiced. Any price-related changes will affect the existing invoice.”*

**Joe Smith - Joe's Company** Job Status:  Job Ref No: ON2314 Q2

Account Ref:  Order Status:  Invoice No:

Product	Description	Qty	Item price	Net price	VAT	Gross price	Stock allocation status	
<input type="checkbox"/>	Roller blinds	1100, 1500, Black Plastic Chal...	3	131.34	9925.19	268.00	10324.53	Fully allocated
<input type="checkbox"/>	Vertical blinds	1100, 1500, Black Plastic Chal...	8	200.50	10256.00	2500.00	13563.48	Partially allocated
<input type="checkbox"/>	Roller Shade	1100, 1500, Black Plastic Chal...	8	200.50	10256.00	2500.00	13563.48.00	Not available
<input type="checkbox"/>	Vertical Shade	1100, 1500, Black Plastic Chal...	4	8.00	16.00	0.00	16.00	Not available
<b>Total</b>				01.00	₹ 131.34	₹ 47881.19	₹ 2394.19	₹ 21559.48

Enable the toggle to make any price-related changes even after invoicing and payment allocation

Fauxwood shutter info Production ✕

Product status:  Recipe name:   Not Rec.

Unit type:

Quantity:


Supplier:

Width:

Drop:

Location:

Shutter material <sup>ⓘ</sup>:



**▼ Dates**

Created date:

Production date:

**▼ Price details**

Cost price:  ON

Discount \$:

Net price:

GST:  ON

Total gross price:

## When Permission is Disabled

- The toggle will not appear
- All job fields remain locked.
- No changes to item pricing or adding new items.

**Lovely Blinds** | Dashboard | All Jobs | Tasks | Calendar | Production management | Purchase orders | More

All jobs > Create job

**Joe Smith - Joe's Company** | Job Status: Lead | Job Ref No: ON2314 | Q2 | Order Status: Under production | Invoice No:

Product	Description	Qty	Item price	Net price	VAT	Gross price	Stock allocation status
Roller blinds	1100, 1500, Black Plastic Chal...	3	131.34	9925.19	268.00	10324.53	Fully allocated
Vertical blinds	1100, 1500, Black Plastic Chal...	8	200.50	10256.00	2500.00	13563.48	Partially allocated
Roller Shade	1100, 1500, Black Plastic Chal...	8	200.50	10256.00	2500.00	13563.48.00	Not available
Vertical Shade	1100, 1500, Black Plastic Chal...	4	8.00	16.00	0.00	16.00	Not available

**Total** | 01.00 | ₹ 131.34 | ₹ 47881.19 | ₹ 2394.19 | ₹ 21559.48

The job has been invoiced and payment recorded, so price-related edits are no longer allowed.

**Lovely Blinds** | Dashboard | All Jobs | Tasks | Calendar | Production management | Purchase orders | More

All jobs > Create job

**Fauxwood shutter info** | Production

Product status: Select status | Recipe name: Standard | Not Real

Unit type: mm | Quantity: 1 | Supplier: Arena | Width: 1500 | Drop: 2000 | Location: Hall | Shutter material: Select

**Dates**  
Created date: 03-05-2024 | Production date: 03-05-2024

**Price details**  
Cost price: 2300.50\$ | Discount \$: 8783.94\$ | Net price: 11084.44\$ | GST: 0% | Total gross price: 11084.44\$

The job has been invoiced and payment recorded, so price-related edits are no longer allowed.

As discussed on call,

A **Master** role needs to be created above **Super Admin**.

Only users with the **Master** role will have full administrative control.

**Super Admin** will be treated as a configurable role, and its permissions can be modified. The **Master** role will not be listed in the Roles screen, as it is restricted to admin users only.