Understanding document status

Getting started

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Understanding document status

What Draft, Submitted, Cancelled, Paid, Overdue and the other labels mean, and how to correct a mistake.

Beginner · About 8 minutes · Version 1.0 · Updated 17 November 2026

Overview

Transactions, such as invoices, move through stages. The label next to the record's name tells you which one it is in.

The three stages

Stage	What it means	Can you edit it?	In your books?
Draft	Saved, not final	Yes	No
Submitted	Final and posted	No	Yes
Cancelled	Reversed	No	Reversed

Submitted documents are locked on purpose, so your records can be trusted and audited.

Other labels you will see

- On invoices: **Unpaid**, **Partly Paid**, **Paid**, **Overdue**, **Return**, **Credit Note Issued**.
- On orders: **To Deliver and Bill**, **To Bill**, **Completed**, **Closed**.
- On leads: **Open**, **Replied**, **Opportunity**.

Steps: correct a mistake in a submitted document

1. Open the document.
2. If it has linked documents (for example a payment), cancel or unlink those first, using the **Connections** tab.
3. Click the **Cancel** button (or **...**, then **Cancel**) and confirm.
4. Click **Amend**. A new draft copy appears with the old number plus a suffix.
5. Correct it and submit again.

For small changes, such as a customer's address, many documents let you update a few fields without cancelling. Look for fields that are not greyed out.

Practical example

An invoice was raised at the wrong price. The accountant cancels it, clicks **Amend**, corrects the rate, and submits. The history shows the original, the cancellation and the amended invoice, so the audit trail is complete.

Important notes

- **Do not** delete submitted documents to hide mistakes. Cancel and amend.
- A document linked to others cannot be cancelled until those are cancelled.

Common mistakes

- Submitting before checking. Review the totals and taxes first.
- Trying to edit a submitted document and not realising it is locked.

Next steps

Read Importing data.

Related documentation

- List views and form views
- Creating a sales invoice
- Invoice submission errors