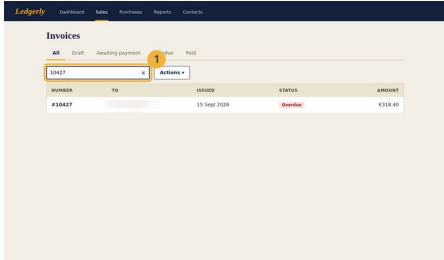
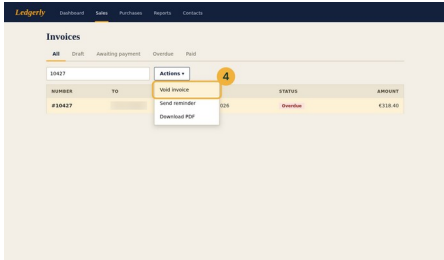
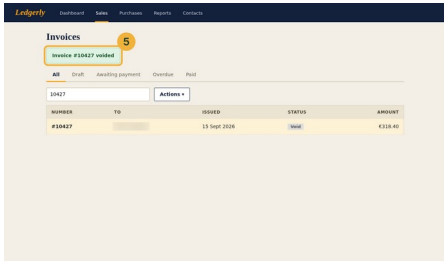


WI-12 Void an unpaid invoice in Ledgerly

Example work instruction for Northwind, a made-up company, from <https://stepkeep.app/guides/work-instructions>. Ledgerly is a demo app; customer names are blurred.

Trigger	A ticket says the customer cancelled and has not paid.
Scope	Invoices with the status Draft, Awaiting payment or Overdue.
Not for	Paid invoices. They get a refund (WI-13 Refund a paid invoice).
Prerequisites	The Finance role in Ledgerly, the invoice number, the ticket open.
Owner	Billing lead
Revision	Rev. 1 · 4 October 2026 · first version
Parent SOP	Billing corrections, step 3

Actions

No.	Action	Screenshot
1	In Search invoices , type the invoice number from the ticket. Only that invoice stays in the list.	
2	Click the invoice's row. The row is highlighted.	
3	Click Actions . A menu opens.	
4	Choose Void invoice .	
5	Check that the notice Invoice #... voided appears above the tabs and that the status reads Void, struck through.	

Expected result

The invoice reads Void. Reply in the ticket with the invoice number and close it.

If this happens

The red notice **is Paid and cannot be voided: issue a refund instead** means the customer has paid. Stop, change nothing, and follow WI-13 instead.

[Ledgerly](#)
[Dashboard](#)
[Sales](#)
[Purchase](#)
[Reports](#)
[Settings](#)

Invoices

#10428 is Paid and cannot be voided. Issue a refund instead.

1

All

Drift

Accounting payment

Overdue

Paid

10/03

Activate >

Invoice#	To	Invoice	Invoice#	Amount
#10428		10 Sept 2019	Paid	€1,240.00