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Manage Invoice Actions and Activity Tracking

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Billing rarely goes perfectly every time, so Kilo GMS gives you tools to correct and document invoices after the fact. You can **reopen** a closed invoice to fix payment errors, add client-facing **notes** to explain discounts or special circumstances, and review the **Activity** log to see every change made to an invoice. This article covers all three.

What You Can Do with Invoice Actions

- Reopen a closed invoice to correct a payment error
 - Void a payment, collect with a different method, or edit the due date and amount after reopening
 - Add notes to an invoice that athletes see on their emailed copy
 - Document discounts, service breakdowns, or reminders directly on the invoice
 - Audit every change to an invoice in the Activity log
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How to Reopen a Closed Invoice

Use this when an invoice was processed incorrectly, for example, charged to **Cash** when it should have been **Credit Card**.

1. Go to the **Invoices** tab and select the specific invoice.
 2. Click the blue **Action** button and select **Refund**. Confirm the refund to proceed.
 3. Click the blue **Action** button again and select **Reopen**. Auto-pay is automatically disabled for the reopened invoice.
 4. Check the invoice status:
 - Invoices with past due dates are marked **Past Due**
 - Invoices with future dates are marked **Upcoming**
 5. Take your next step: **Void** the payment, **Collect** using a different method, or **Edit** the due date and amount.
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How to Add Notes to an Invoice

Invoice notes let you add context, clarity, and communication directly on the invoice, whether it's a personalized message, a breakdown of services, or a special reminder.

Important: invoice notes are client-facing. Athletes see your notes at the bottom of the invoice when they receive an emailed copy, including when they request a copy through the Athlete App.

1. Log in to your admin or staff account at app.usekilo.com.
2. Go to the **Invoices** section.
3. Click the blue **Action** button next to the invoice you want to update.
4. Click **Edit**.
5. Click the **Notes** tab at the top, next to **Info**.
6. Type your message in the notes field.
7. Click **Save**.

When an athlete requests a copy of the invoice via the Athlete App, the email they receive includes both the invoice and your notes, giving them a clear record of their charges and any relevant context in one place.

Example: A note explaining that a 10% discount was applied to a retail item, so the athlete understands why the total differs from the listed price.

How to Track Invoice Activity

Every change to an invoice is recorded so you can maintain a clear financial timeline.

1. Open the invoice.
2. Scroll to the **Activity** section.

The Activity log shows all edits, including who reopened the invoice, when notes were added, and any changes to the amount.

Reopen vs. Notes vs. Activity: Quick Reference

	Reopen	Notes	Activity
Purpose	Correct a payment error on a closed invoice	Explain charges, discounts, or reminders	Audit every change to the invoice
Who sees it	Staff (resulting status visible to athlete)	Athletes, on their emailed invoice copy	Staff only
Where to find it	Blue Action button on the invoice	Notes tab in the invoice editor	Activity section on the invoice
Editable?	Follow with Void, Collect, or Edit	Yes, edit and save again	No, it's an automatic log

Frequently Asked Questions

How do I fix an invoice that was paid with the wrong payment method?

Refund the invoice, then reopen it and collect with the correct method. Open the invoice, use the blue Action button to Refund, then use it again to Reopen. Once reopened, choose Collect and select the right payment method.

Will my athletes see the notes I add to an invoice?

Yes. Invoice notes are client-facing. Athletes see them at the bottom of their invoice whenever they receive an emailed copy, including copies they request through the Athlete App. Keep notes professional and athlete-appropriate.

Why did auto-pay turn off on an invoice I reopened?

Auto-pay is automatically disabled whenever an invoice is reopened. This prevents the system from re-collecting the payment while you're still correcting it. Once the invoice is sorted out, collect it manually or with the athlete's preferred method.

What status will a reopened invoice have?

It depends on the due date. Reopened invoices with past due dates are marked Past Due, and invoices with future dates are marked Upcoming.

How can I see who changed an invoice?

Check the Activity section on the invoice. It logs every edit, including who reopened the invoice, when notes were added, and any amount changes.

Can I add a note explaining a discount on an athlete's invoice?

Yes, and it's one of the best uses of invoice notes. Edit the invoice, open the Notes tab, and describe the discount. The athlete sees the explanation on their emailed copy, which prevents confusion about why the total changed.

Helpful Tips

- Always refund before reopening; the reopen option follows the refund in the workflow
- Write invoice notes as if the athlete will read them, because they will
- Use notes proactively whenever a charge deviates from the norm; a one-line explanation prevents a support conversation later
- Check the Activity log first when investigating a billing question; it usually answers "what happened and who did it" immediately
- After reopening an invoice, remember auto-pay is off; collect the payment manually so the invoice doesn't sit unpaid

When This Feature Is Most Helpful

- **A payment was recorded with the wrong method:** refund, reopen, and collect with the correct one
- **You gave a one-off discount:** add a note so the athlete's emailed invoice explains the adjusted total

- **An athlete disputes a charge:** the Activity log and notes give you a complete record of what changed and why
- **A reopened invoice needs different terms:** edit the due date or amount before collecting
- **You're reconciling billing at month end:** the Activity log provides the audit trail for any invoice that was touched

If you have questions about invoice actions and activity tracking in Kilo GMS, our Support team is happy to help. Reach us at **hello@usekilo.com**.

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