

Nuts & Bolts

Merging Invoices



This is a visual walkthrough showing how to combine invoices in Xero.

If you're using an integrated time tracking system like Harvest to generate invoices, occasionally you may have created multiple draft invoices for the same client that you'd like to merge. Or perhaps you have two approved quotes that you'd like to combine into one invoice. Here's how you can do it:

Only invoices within the same status tab can be selected for merging. If you need to create a combined invoice from two different statuses, like an Approved invoice and a Draft invoice, copy the Approved invoice as a draft first.

Created by
Jennifer Rivera



Invoices

New Invoice

New Credit Note

Send Statements

Import

Export

Invoice Reminders

All

Draft (3)

Awaiting Approval (0)

Awaiting Payment (9)

Paid

Repeating

Submit for approval

Approve

Delete

Print

Email

Copy to...

2 items selected | 6,788.38 USD

<input type="checkbox"/>	Number	Ref	To	Date	Due Date
<input checked="" type="checkbox"/>	INV-0041	P/O CRM08-12	Ridgeway University	Aug 25, 2022	Sep 8, 2022
<input checked="" type="checkbox"/>	INV-0040	Monthly support	Ridgeway University	Aug 3, 2022	Aug 18, 2022
<input type="checkbox"/>	INV-0039	Monthly support	Hamilton Smith Ltd	Aug 3, 2022	Aug 18, 2022

Select the two invoices you would like to combine and then click “Copy To...”.

invoice ▾ New Credit Note Send Statements Import Export Invoice Reminders: Off

Draft (3) Awaiting Approval

Draft Invoice Saved - City Limou
View Invoice

approval Approve Delete

Ref	Due
P/O CRM08-12	6,187.50
Monthly support	600.88
	273.13

Copy & merge into a new... ✕

Invoice

Merge all contents into one for:

Ridgeway University

Ridgeway University

Purchase Order

Bill

Cancel Copy & merge

Under the “Invoice” selection, choose the client name and then select Copy & Merge.

New Invoice

To	Date	Due Date	Invoice #	Reference	Branding				
Ridgeway University	Aug 25, 2022	Sep 8, 2022	INV-0042		Standard				Preview

[Add last items](#)

USD United States Dollar Amounts are Tax Exclusive

Item	Description	Qty	Unit Price	Disc %	Account	Tax Rate	Region	Amount USD	
::	Onsite Management for CRM Project	1.00	5,663.62		400 - Sales	Tax on Sales (9.25%)	West Coast	5,663.62	×
::	Monthly Desktop/network support via email & phone	1.00	550.00		400 - Sales	Tax on Sales (9.25%)	West Coast	550.00	×

[Add a new line](#)

Subtotal 6,213.62
Total Sales Tax 9.25% 574.76

TOTAL 6,788.38

[Save](#) [Approve](#) [Cancel](#)

A new invoice will be created with line items selected from both invoices, based on the original date order of the invoices.

History & Notes

[Add Note](#)

Sales overview >

Invoices

New Invoice ▾

New Credit Note

Send Statements

Import

Export

● Invoice Reminders: Off

All

Draft (4)

Awaiting Approval (0)

Awaiting Payment (9)

Paid

Repeating



Draft Invoice Saved - Ridgeway University - Due 8/09/2022 - Total 6,264.50

[View Invoice](#)

Submit for approval

Approve

Delete

Print

Email

Copy to...

2 items selected | 6,264.50 USD ?

Search

<input type="checkbox"/>	Number	Ref	To	Date ▾	Due Date	Due
<input type="checkbox"/>	INV-0042	August charges merged	Ridgeway University	Aug 25, 2022	Sep 8, 2022	6,264.50
<input checked="" type="checkbox"/>	INV-0041	P/O CRM08-12	Ridgeway University	Aug 25, 2022	Sep 8, 2022	5,663.62
<input checked="" type="checkbox"/>	INV-0040	Monthly support	Ridgeway University	Aug 3, 2022	Aug 18, 2022	600.88
<input type="checkbox"/>	INV-0039	Monthly support	Hamilton Smith Ltd	Aug 3, 2022	Aug 18, 2022	550.00

Delete the original invoice drafts, as well as any approved invoices that were copied to Draft.

For more time-saving invoicing tips, check out our blog post - [Your Guide to Xero Tips: Eight Ways to Make Invoicing a Breeze.](#)

Check out our growing library of [Xero tips and tricks](#) as well [our small business guides to hiring, taxes and more!](#)

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