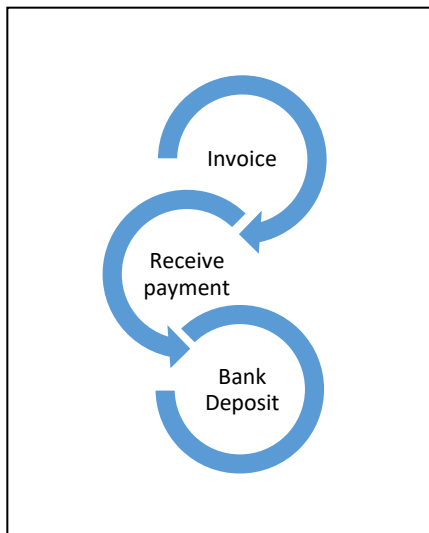


## Unwinding Sales Transactions

### Chapter 3



Sometimes you need to unwind a sales transaction in order to delete it or to make changes. If you or your students find yourself in this situation, here are a few possible scenarios and solutions.

Action	What happens
Try to delete an invoice that has a payment applied	Can delete an invoice with a payment attached; QBO will un-apply the payment and leave a credit balance in the customer account.
Try to correct an invoice that has a payment applied	You can edit/change an invoice with a payment applied; QBO will just leave a debit (unpaid) balance or a credit (un-applied) balance on the customer account. If the correction reduces the invoice amount below the amount paid, the <b>payment</b> form will automatically change. Any payment over the invoice amount will show as a credit.
Try to delete or correct a payment that has been deposited	<p>Will get an error message:</p> <div style="border: 1px solid red; padding: 5px; margin: 10px 0;"> <p><b>! Something's not quite right</b></p> <p>This transaction has been deposited. If you want to change or delete it, you must edit the deposit it appears on and remove it first.</p> </div> <p>Delete deposit (or remove the selected payment from the deposit), make corrections, and re-deposit.</p>

NOTE: In practice, once an invoice has been sent to a customer, you should not delete or change the invoice. Instead, a credit memo should be issued.

- *Updated: July 15, 2021*