Deleting a transaction

How you delete transactions (such as invoices, quotes, credit notes, journals and purchases) is similar across all transaction types in AccountRight. You open the transaction and select **Delete** from the **Edit** menu (you can also right-click in the transaction window and select the delete option). When you delete a transaction, it's permanently removed from your records. **Need to delete a pay?** See Changing a recorded pay .

There are a number of restrictions when deleting transactions. Your security preferences and user role must allow deleting, the transaction can't be in a locked period and the transaction must be in your current financial year. There are also some restrictions depending on the type of transaction you're deleting, these are explained below.

Also, you can only delete a transaction if your security preferences allow transactions to be changed. A changeable transaction is identified by a blue zoom arrow 🔵 next to it.

Follow the procedure below to:

- delete sales, including invoices, orders, quotes and credit notes
- delete purchases, including bills, orders, received items, quotes and debit notes
- delete spend money and receive money transactions
- delete journals, including general journals and account transfers.

To allow transactions to be deleted

To allow transactions to be deleted

If your user role allows you to change preferences, you can change this option at any time.

1. Go to the **Setup** menu and select **Preferences**.

   > **Preferences option greyed-out?** Your user role needs to be set up with permission to set preferences. If you need to regularly change preferences, ask your administrator to add this permission to your user role.

2. Select the **Security** tab,

3. Deselect the **Transactions CAN'T be Changed; They Must be reversed** option.
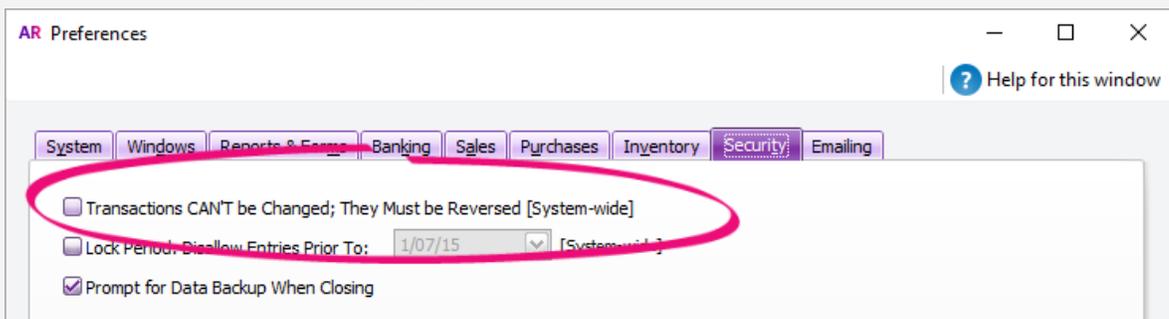
To delete a transaction

To delete a transaction

1. Find and display the transaction in its original transaction window.
2. Go to the **Edit** menu and choose **Delete [...]**. For example, if you want to delete a sale, choose **Delete Sale**. The transaction will be removed permanently from your record. If you only have the option to **Reverse** the transaction, change the preference as described above.
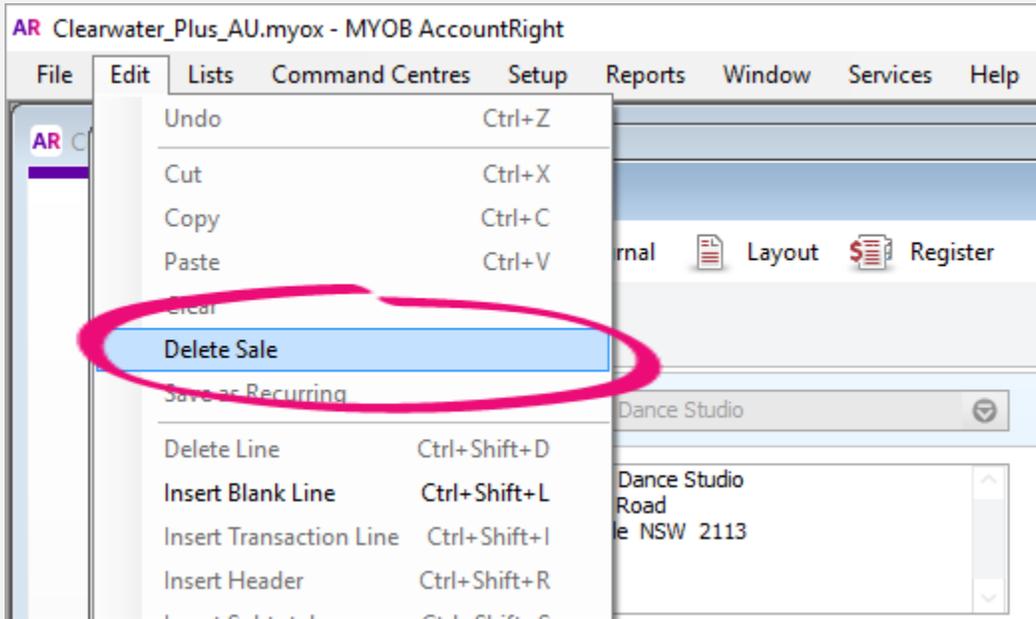
> **Delete [...] greyed-out?** Your user role needs to be set up with permission to delete transactions. If you need to regularly change transactions, ask your administrator to add this permission to your user role.

Important information about different transaction types

Sales transactions

Purchase transactions (Not Basics)

Grouped receipts that have been deposited

Reconciled transactions

GST and activity statement reporting (Australia)

GST reporting (New Zealand)

Insufficient on-hand item quantities (Not Basics)

General journals

FAQs

Why is a transaction's zoom arrow shaded?

I want to remove transactions from my print or email list

I can't delete a purchase as there's insufficient stock on-hand

How do I delete a payment applied to a sale or purchase?

How do I delete a payroll transaction?

Related topics

Deleting an invoice, quote or order

Deleting a record

Deleting an account

Deleting a recurring transaction

Changing a transaction

Reversing a transaction

From the community

DANGEROUS read only users also can delete invoices from the tray except can hide bank feed transactions
Account Right - Delete Purchase
Recurring Transactions can you delete more than one transaction at a time
Deleting Transaction
Delete Payment

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