

Reversing an Invoice

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Reversing an Invoice

Invoices can only be reversed when there are no allocations linked to them. Therefore, any invoice you wish to reverse should appear in the 'Invoices and Credits' section of a patient record under the Unpaid tab.

The process to follow is:

(If you know the invoice number involved, you can skip directly to step 5 by using the Advanced Search feature and in the Financial section, entering the invoice number)

1. Search for a patient.
 2. Click Show.
 3. In the Main Menu, click **Invoices & Credits**.
 4. Select the **Unpaid** tab from the banner.
 5. Click the **Show** button next to the required invoice.
 6. Confirm that there are no allocations to any of the items. If there are allocations, you will need to re-allocate those payments before proceeding.
 7. Click the **Reverse** button just below the banner.
 8. You will be required to provide a reason for the reversal ([Global Setting: Force Reversal Reason Invoices](#))
 9. Click the **Yes** button to complete the process.
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