

Transactions

How to record and edit transactional information.

- [Recording the check-in transaction](#)
- [Editing a transaction](#)
- [Recording a transaction without a check-in](#)
- [Reversing a Transaction](#)

Recording the check-in transaction

All transactional information related to an appointment can be recorded when you check in a patient. This is described in detail in the [Checking In](#) section.

Editing a transaction

In Open ACU you cannot edit transactions, checkins or otherwise.

To edit a transaction you've already saved, first you'll need to reverse the check-in. Click the pencil icon next to the patient's name. In the pop-up that appears, check the box next to "Check Out This Transaction?" then click Remove Transaction. This will remove the payment transaction.

Reverse Check-In

☒ Check Out This Appointment?

Reversing this appointment checkin will also remove the payment transaction.

[111] Transaction

August 11, 2020, 11:13 am

ID	Description	Amt
245	Treatment	\$20.00
246	Amount Paid	(20.00)
Paid		\$20.00

🔍

Print Appointment

Remove Checkin

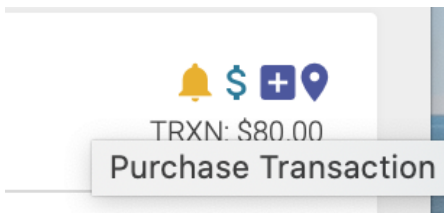
Add a Note...

Save Note

You can then check in the patient again and enter the correct transaction information.

Recording a transaction without a check-in

To record a transaction that isn't connected with an appointment, you'll use the Purchase Transaction option. Click on the blue dollar sign icon next to the date at the top of the day's appointments:



A popup modal will appear, where you will select the location, enter the customer's name, a description of the charge, the amount paid and the form of payment.

Create A Transaction

Location

Main Street

For Patient

Jiminy Cricket |James C Cricket| [jiminy@disney.com]

Description	Amount	
<div>Description of Charge</div>	<div>0.00</div>	<div></div>
Payment	<div>00.00</div>	

Tokens

Credits

Gift Certificate

Optional Note...

VISA

**1881: card on file

MasterCard

**5100: card on file

Check

Cash

Other

Pay

New Main

Charge In
Person
Card

☐ Save the customer card for later?

Cancel

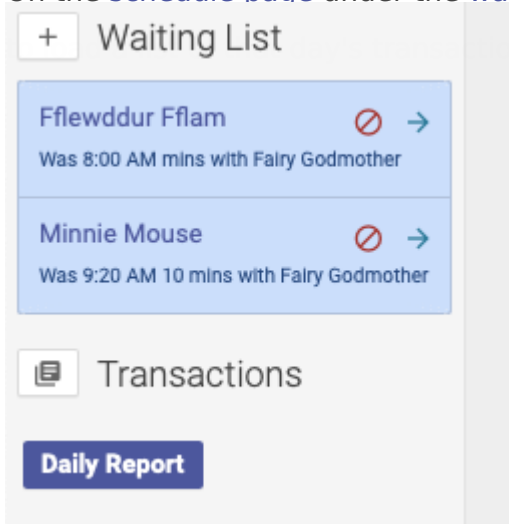
Purchase transactions will appear on the day's [Transaction Report](#) but not on the [Appointment Report](#).

Reversing a Transaction

Sometimes you create a transaction and there was an error or the credit card failed. In Open ACU you can reverse any transaction. **Just be aware that this process may be connected to credit card processing and your account may charge a fee for reversals. This goes for reversing checkin transactions as well.**

In Open ACU you cannot edit transactions, checkins or otherwise.

On the [schedule page](#) under the [waiting list](#) is a "Transactions" button. Click the button to the left



Blue items in the list are appointments. To reverse the transaction and [un-check the appointment](#) go to the appointment in the schedule to do so.

Gray items in the list are transactions. Click the pencil to see the transaction. It will show the details in a modal window.

Transaction Details



[349] Transaction

Fri, Dec 4 2020

Patient: Donald D Duck [dduck@disney.com]

ID	Description	Amt
769		(0.00)
770	5 Tokens	\$100.00
771	Amount Paid	(100.00)
Paid		\$100.00

[Print Receipt](#)[Reverse Transaction](#)

If you want to reverse the transaction, deleting it from the system, click "Reverse Transaction". This will remove the invoice and all its items from the records. It will also reverse any credit or token values for the patient.