

Appointment Notes on Invoices

When you check in a patient and record their transaction, any notes you record in the Add a Note field will appear on the printable invoice, which can be viewed by patients:

Checkin & Payment

For Grumpy The Dwarf

At 11:10 AM

Q X

Check In + Payment

Check In Only

Charges	Amount	+
acupuncture Treatment	20	+
Past Due	25	
Payment Total	45.00	

Buy Tokens

\$ Buy Credits

Add A Note...

Appointment Notes:

Check

Save

Sunshine Acupuncture
123 Main Street Nashville TN 37216
(615) 319-0316
artdudejoe@icloud.com

Patient: Grumpy The Dwarf
grumpy@disney.com
(615) 555-1212

Description	Amount
acupuncture Treatment	\$ 20.00
Past Due	\$ 25.00
Amount Paid	\$ 45.00
Total	\$ 45.00
Credit Applied	\$ 25.00

Payment Method
Check

NOTE:

This note appears on the invoice

Hiding appointment notes

If you do NOT want these notes to appear on invoices, you can change this setting on your [Settings](#) page, in the Basics section - just click the Hide Appointment Notes on Invoices box:

Basics

- ☒ **Active:**
Patients can make appointments
- ☒ **No Reminder Emails:**
Stop sending reminder emails to patients.
- ☒ **No Confirmation Emails:**
Stop sending confirmation emails to patients the day they were made.
- Sandbox accounts cannot send reminder emails.
- ☐ **Cancel Notification:**
Send an email to artdudejoe@icloud.com when patient cancels an appointment.
- Default Payment Method**
Check
- ☒ **Daily Appointments:**
Allow patients to make more than one appointment per day.
- ☒ **Send Intake:**
New patients have an intake created and emailed the link.
Only true if intakes are setup
- ☒ **Sort Blocks Alphabetically:**
By default blocks are sorted by time. This overrides that.
- ☒ **Allow Checkin without a transaction**
By default a transaction is required when checking a patient in.
- ☒ **Hide Appointment Notes on Invoices**
Checking this box will exclude appointment notes when viewing or printing invoices; for both patients and in the scheduler.

Save Basics



Patient: **Peter Pan**
peterpan@disney.com
(615) 555-1212

3 invoices between January 1, 2022 to July 5, 2022.

2022-01-01

2022-07-05

Submit

Invoice: #574 Appointment: Fri May 13, 2022 @ 09:20 AM At Main Street	With Alexa Hulsey L.Ac. License: 32165431
Description	Amount
acupuncture Treatment	\$ 20.00
Amount Paid	\$ 20.00
	Total \$ 20.00
Payment Method CreditCard	
NOTE: Peter is not flying as much as he did last year.	

Invoice: #573 Appointment: Thu Jun 30, 2022 @ 01:30 PM At Main Street	With Fairy Godmother ABC123 License: 93207847
Description	Amount
Magic Treatment	\$ 20.00
Patient Token Applied	\$ 20.00
	Total \$ 0.00
NOTE: Apparently Peter is not a little boy anymore.	

These notes will not appear on patient invoices

Revision #2

Created Thu, Jul 7, 2022 1:31 PM by [Alexa Hulsey](#)

Updated Fri, Jul 19, 2024 2:49 PM by [Alexa Hulsey](#)