

# 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 Q X  
For Grumpy The Dwarf  
At 11:10 AM

**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

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

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**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 Hulseley  
 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 Hulseley

Updated Fri, Jul 19, 2024 2:49 PM by Alexa Hulseley