

# Check in without recording a transaction

You can check in a patient without recording a transaction by enabling the checkin without transaction feature.

## Getting started

To turn on this feature, go to your Settings page. In the Basics section, click the Allow Checkin without a Transaction box:

Basics

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|  |   |
|--|---|
| <input checked="" type="checkbox"/> <b>Active:</b><br>Patients can make appointments   | <input checked="" type="checkbox"/> <b>Daily Appointments:</b><br>Allow patients to make more than one appointment per day.                                   |
| <input checked="" type="checkbox"/> <b>No Reminder Emails:</b><br>Stop sending reminder emails to patients.                                | <input checked="" type="checkbox"/> <b>Send Intake:</b><br>New patients have an intake created and emailed the link.<br><i>Only true if intakes are setup</i> |
| <input checked="" type="checkbox"/> <b>No Confirmation Emails:</b><br>Stop sending confirmation emails to patients the day they were made. | <input checked="" type="checkbox"/> <b>Sort Blocks Alphabetically:</b><br>By default blocks are sorted by time. This overrides that.                          |
| <b>Sandbox accounts cannot send reminder emails.</b>   | <input checked="" type="checkbox"/> <b>Allow Checkin without a transaction</b><br>By default a transaction is required when checking a patient in.            |
| <input type="checkbox"/> <b>Cancel Notification:</b><br>Send an email to artdudejoe@icloud.com when patient cancels an appointment.        |   |

[Save Basics](#)

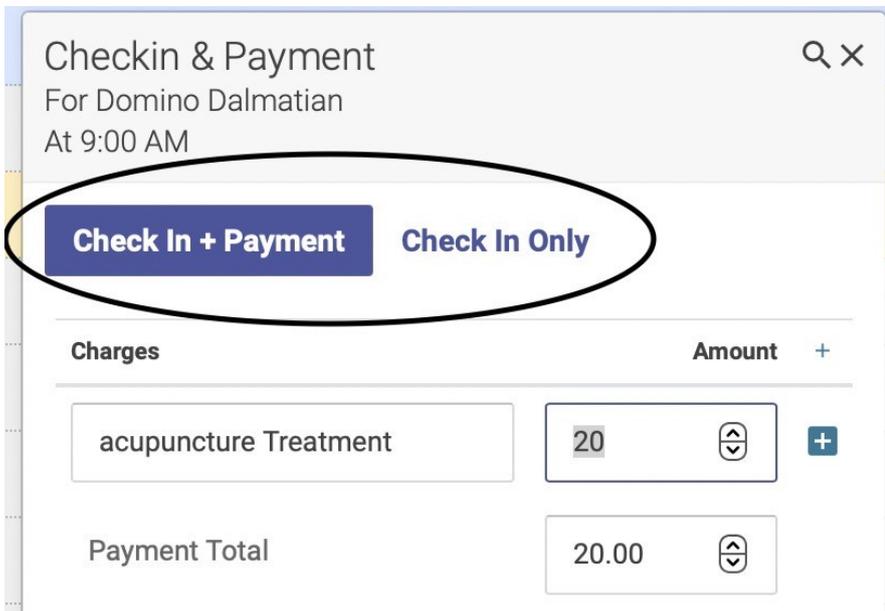
Note: the default setting is to require a transaction at the time of checkin. If you'd like to check in patients without a transaction, you'll need to opt in to this feature.

Be sure to click Save Basics when you're finished.

## How to check-in without recording a

# payment

First, click the checkbox next to the patient's name on the schedule. The popup that appears will show two options: **Check In + Payment** or **Check In Only**:

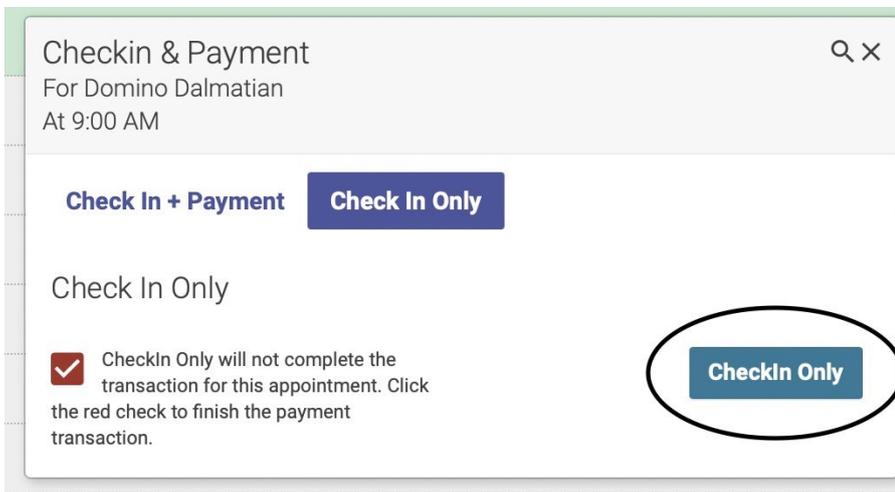


Checkin & Payment  
For Domino Dalmatian  
At 9:00 AM

**Check In + Payment** **Check In Only**

| Charges               | Amount |   |
|-----------------------|--------|---|
| acupuncture Treatment | 20     | + |
| Payment Total         | 20.00  |   |

Click **Check In Only**—this will eliminate the payment and transaction boxes from the popup window. Then click the green Checkin Only button in the bottom right hand corner of the popup box:



Checkin & Payment  
For Domino Dalmatian  
At 9:00 AM

**Check In + Payment** **Check In Only**

Check In Only

CheckIn Only will not complete the transaction for this appointment. Click the red check to finish the payment transaction.

**Checkin Only**

The checkin check box next to the patient's name will now appear in RED—this is your reminder that you still need to collect and record the patient's payment:



9:00 AM  
🔑 Domino Dalmatian 📎 📄

9:10 AM

When you're ready to collect and record payment, click the red check box. This will bring up the popup window, where you can record the transaction (you also have the option here to reverse the

checkin, if you checked in this patient by mistake):

### Checkin & Payment

For Domino Dalmatian  
At 9:00 AM

Reverse Checkin Only  
This appointment was checked in without a transaction.

**Reverse Checkin**

| Charges  | Amount                             |                                |
|--|------------------------------------|--------------------------------|
| <input type="text" value="Description of Charge"/> | <input type="text" value="30"/>    | <input type="text" value="⊕"/> |
| Payment Total                                      | <input type="text" value="30.00"/> | <input type="text" value="⊕"/> |

**Buy Tokens** **Buy Credits**

Add A Note...

**VISA** \*\*9969: card on file

Check

Cash

Other

Save the customer card for later?

**Check In And Pay**

**Charge In Person Card**

Add Just A Note

**Save Note**

Once you've recorded and saved the payment, the patient will appear in yellow on the schedule:



Here's a quick screen recording showing how it works:

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