

Recording a note prior to checkin

If you want to record a note on an appointment prior to the check-in, you'll click on the check-in icon next patient's name on the schedule as if you were going to check them in. However, don't enter any payment info. Instead, you'll add a note in the "Add note only" box at the bottom and click save:

Checkin & Payment ×

For Snow White
At 9:00 AM

Charges	Amount	+
Treatment	20	+
Payment Total	20.00	

Add A Note...

CreditCard ▾ Save

Add a note only Save

Once you add the note and click Save, the checkin icon next to the patient's name on the schedule will turn yellow:

9:00 AM	🔑 Snow White 📄	🚫 ✓
9:10 AM	🔑 Grumpy The Dwarf 📄	🚫 ✓
9:20 AM	🔑 Happy D Dwarf 📄 🏠	🚫 ✓

