

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 📄 🏠	🚫	✅

When you check in the patient, your recorded note will appear in the "Add a note only" box, and in the box above the payment method:

9:00 AM

🔑 Snow White

9:10 AM

🔑 Grumpy The D

9:20 AM

🔑 Happy D Dwa

9:30 AM

9:40 AM

9:50 AM

10:00 AM

10:10 AM

10:20 AM

10:30 AM

10:40 AM

10:50 AM

11:00 AM

11:10 AM

Checkin & Payment

For Snow White

At 9:00 AM

Charges

Amount

+

Treatment

22

⬆ ⬇ ⬆

+

Payment Total

22.00

⬆ ⬇ ⬆

💎 Buy Tokens

💵 Buy Credits

she's bringing apples

CreditCard

Save

she's bringing apples

Save

Here's a quick video showing how it works:

Revision #2

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