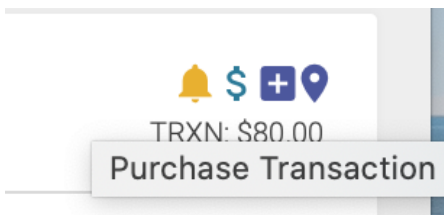


Recording a transaction without a check-in

To record a transaction that isn't connected with an appointment, you'll use the Purchase Transaction option. Click on the blue dollar sign icon next to the date at the top of the day's appointments:



A popup modal will appear, where you will select the location, enter the customer's name, a description of the charge, the amount paid and the form of payment.

Create A Transaction

Location

Main Street

For Patient

Jiminy Cricket |James C Cricket| [jiminy@disney.com]

Description	Amount	
<div>Description of Charge</div>	<div>0.00</div>	<div></div>
Payment	<div>00.00</div>	

Tokens

Credits

Gift Certificate

Optional Note...

VISA

**1881: card on file

MasterCard

**5100: card on file

Check

Cash

Other

Pay

New Main

Charge In Person Card

Save the customer card for later?

Cancel

Purchase transactions will appear on the day's [Transaction Report](#) but not on the [Appointment Report](#).

Revision #4

Created Wed, Aug 12, 2020 7:54 PM by [Alexa Hulsey](#)

