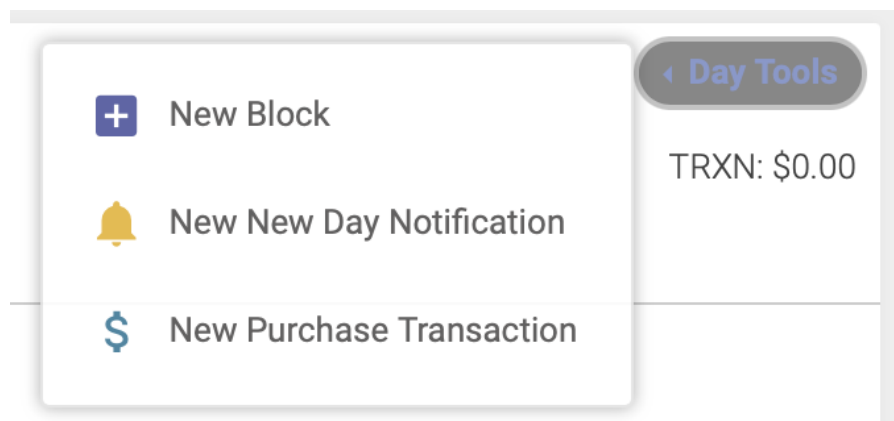


# Recording a transaction without a check-in

To record a transaction that isn't connected with an appointment, you'll use the Purchase Transaction option. At the top of the schedule, click the Day Tools dropdown menu, then click New Purchase Transaction:



A popup modal will appear, where you will select the location, enter the patient'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

☒

\*\*5100: card on file

☐

Check

☐

Cash

☐

Other

Pay

New Main

☐ Save the customer card for later?

Charge In  
Person  
Card

Cancel

If someone is purchasing [tokens](#), [credits](#), or a gift certificate, click on the corresponding button under the Description of Charge field. Tokens and/or credits purchased will automatically be added to the patient's account.

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

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Revision #6

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

Updated Wed, Jul 16, 2025 3:28 PM by [Alexa Hulse](#)