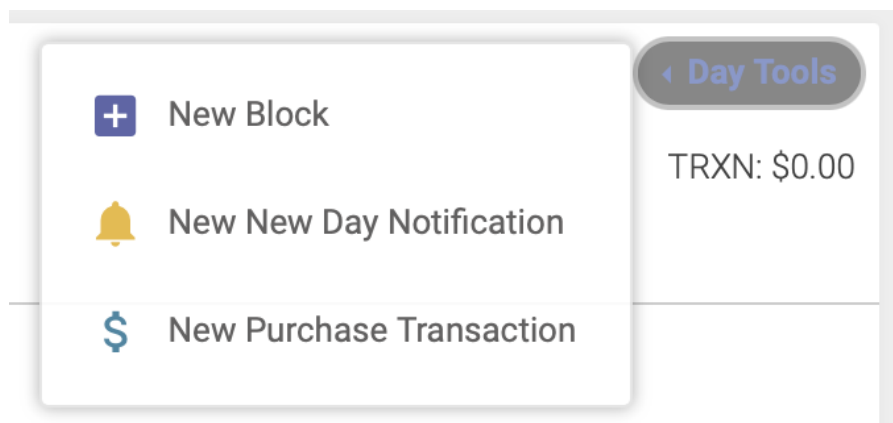


Recording a transaction without a check-in

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



Description of Charge

0.00



Payment

00.00



Tokens Credits Gift Certificate

Optional Note...

**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](#).

Revision #6

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