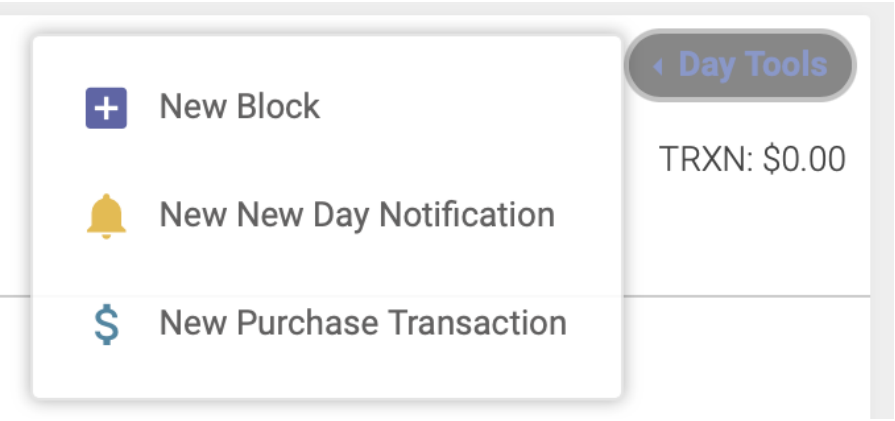
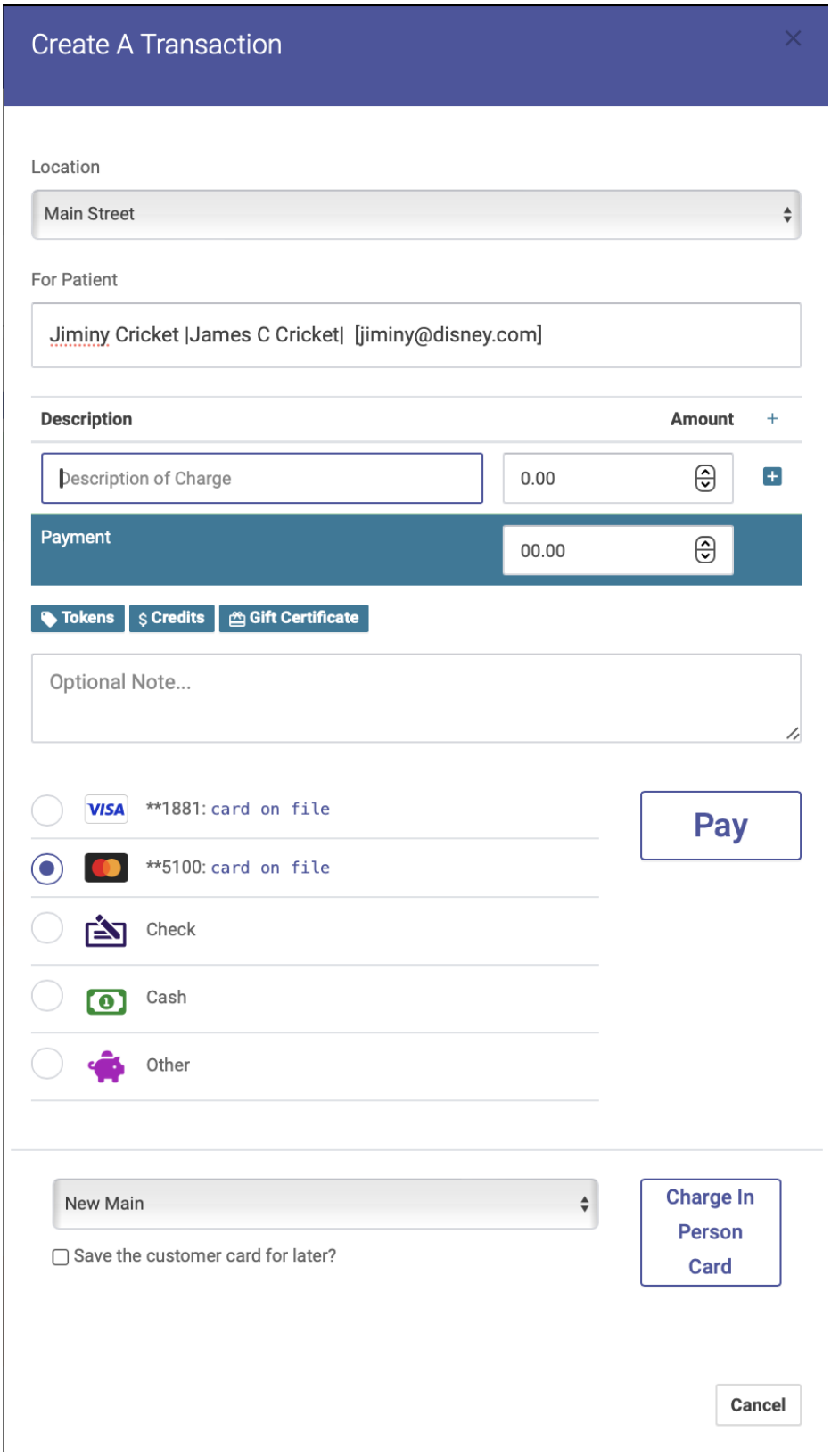
Recording a transaction without a check-in

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.



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
Created 2020-08-12 19:54:01 UTC by Alexa Hulsey
Updated 2025-07-16 15:28:05 UTC by Alexa Hulsey