

Quick Payments

23/10/2024 9:53 am BST

The Payments button can be accessed via the Reception, Treatment and Day list Screens. The behaviour of the 'Payments' button is defined by the system setting '[Payment action navigates to account](#)'.

If this setting is ticked, the system will navigate to the **Accounts > Payments** screen.

If this setting is un-ticked, the system will open a quick payments window.

Which setting is best for my practice?

Quick Payments: Automatically allocates payments to the oldest invoice.

Account Payments: More functionality and enforces users to manually allocate payments against invoices. This is the recommended setting.

Details

This page of the manual documents the functionality of the 'Quick Payments' feature.

Selecting the Payments button via the Reception, Treatment or Day list Screen will open the below window.

The screenshot shows the 'Payments' window with the following details:

- Title Bar:** Payments
- Buttons:** Open Till, Pay Balance, Close
- Methods Sidebar:** Credit Card, Online Payments, Cash, Direct Debit, BACS, Adjustment, Cheque, Debit Card
- Main Fields:**
 - Receipt Date: 29/07/2024
 - Payment Method: [Dropdown]
 - Amount Paid: 0.00
 - Change From: 0.00
 - Change Due: 0.00
- Options:**
 - ☐ Mark as payment in advance
- Text Fields:** Note, Initials
- Buttons:** Save
- Balance:** 38.87

Taking a Payment

1. Specify the Payment **Date**, **Payment Method** and **Amount Paid** (Use 'Pay Balance' button to pre-populate the amount with the Client's balance).
2. If the Payment Method selected is 'Cash' see steps 3 and 4, if not see step 5.
3. Specify the 'Change From' (amount tendered). For example, if the balance is £38.87 and the Client gave us £40.00 then this would be entered as below:

Payments [Icon] [X]

Open Till
 Apply ESD
 Pay Balance
 Close

Methods

- Credit Card
- Online Payments
- Cash**
- Direct Debit
- BACS
- Adjustment
- Cheque
- Debit Card

Receipt Date: 29/07/2024
 Payment Method: Cash

Amount Paid: **38.87**

Change From: **40.00**

Change Due: **1.13**

☐ Mark as payment in advance

Note:

Initials:

Balance: **38.87**

- The Change Due is displayed.
- Enter a note (if required).
- Enter your Initials (This is an optional [system setting](#)) .
- Select '**Save**'. The Payment will be added to the Clients account and automatically allocated to the oldest invoice.
- When paying by cash the pop up will show with the change due.

