

Payments

14/07/2025 4:47 pm 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 accounts'.

If this setting is un-ticked, the system will open a quick payments window, as shown below:-

The screenshot shows a 'Payments' window with a sidebar of payment methods and a main form area. The sidebar includes Credit Card, Debit Card, Cash, BACS, Cheque, Voucher, Adjustment, and Adjustment. The main form has fields for Receipt Date (14/07/2025), Payment Method (dropdown), Amount Paid (0.00), Change From (0.00), Change Due (0.00), a checkbox for 'Mark as payment in advance', a Note field, an Initials field, and a Balance field showing 45.61. A Save button is located at the bottom right.

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

Which setting is best for my practice?

Quick Payments: Automatically allocates payments to the oldest invoice.

Account Payments: Enforces users to manually allocate payments against invoices. This is the recommended setting for best practice.

Details

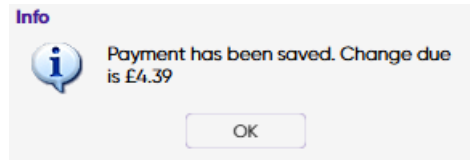
This page of the manual documents the functionality of the 'Accounts > Payments' screen.

Taking a Payment through the Accounts screen provides you with a list of all unallocated account activity and all advanced payments yet to be allocated.

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).
4. The Change Due is displayed.
5. Enter a note (if required).

6. Enter your Initials (This is an optional [system setting](#)) .
7. Select 'Save'.
8. Once saved, the payment will display in the Accounts screen and a green tick will display next to the allocated invoices.
10. If the user paid by cash and change is due, a pop up saying the amount will display.



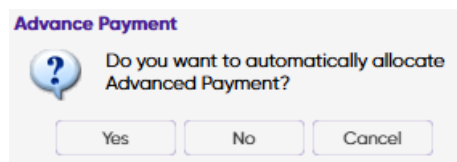
Making a Payment in Advance

If the client wishes to make a payment in advance of receiving treatment, the payment can be flagged as an advanced payment. A common example of this could be a client paying in advance for a euthanasia appointment.

1. Follow the steps above in 'Taking a Payment'.
2. Tick the checkbox 'Mark as payment in advance'.

Receipt Date	Payment Method	Amount Paid:	<input type="text" value="100.00"/>
<input type="text" value="14/07/2025"/>	<input type="text" value="Credit Card"/>	Change From:	<input type="text" value="100.00"/>
<input checked="" type="checkbox"/> Mark as payment in advance	Change Due:	<input type="text" value="0.00"/>	

3. Select 'Save'.
4. A prompt will appear asking if you want to automatically allocate the advanced payment.



Yes = Automatically allocate payment against forthcoming treatment items

No = Manually allocate payment against forthcoming treatment items (using [Accounts > Payments Screen](#)).

Cancel = Cancel transaction.

Opening the Till

The 'Open Till' button can be used to open the till if it has been configured to integrate with Merlin.

Applying ESD

An Early Settlement Discount can be applied to the Client from the payment screen.

This option will only be available when applicable. for more information see the [Early Settlement Discounts page](#).
