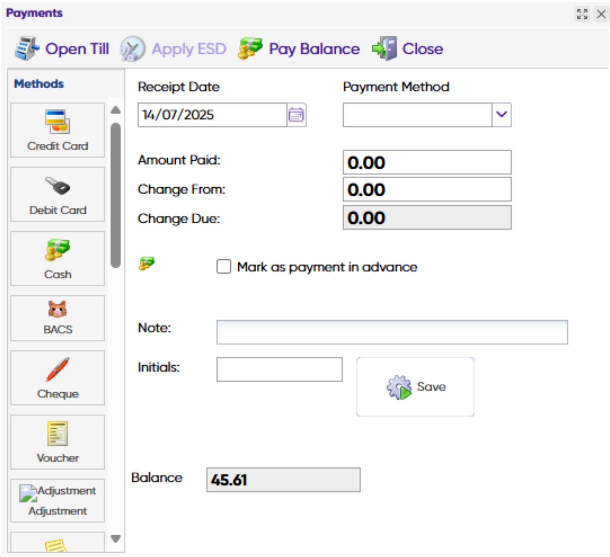
Quick Payments

14/07/2025 3:38 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 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: *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.

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:
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'. The Payment will be added to the Clients account and automatically allocated to the oldest invoice.
8. When paying by cash the pop up will show with the change due.