

i-Clarity has two point of sale forms.

1. **The patient account.** This is accessed by ensuring the patient you would like to process a sale or payment for is active on the screen and then by clicking the 'Px Sale' icon.



2. Walk-in Sales. This is accessed by clicking on the 'Walk in' icon. The form that opens will ignore the active patient record.



The layout of both the patient account and the walk-in sale are the same, however, the walk-in sale has reduced functionality e.g. You cannot leave an outstanding balance on a walk-in sale.

Features of the patient account form.

Mr M Rutherfud (6245) Sales Transactions Summary Date Value To Pay 28/07/2020 £10.00 28/07/2020 £300.00 28/07/2020 £21.31 £0.00	A full list of the sales put through o the patient's account, including all historical sales, will be listed in the 'Sale Transactions Summary' field. It shows the date of the sale. The total value of the sale and
11/07/2020 £50.00 £0.00 []	 the amount the patient has left to pay. Lines in white have been paid in full Lines highlighted in pink have an outstanding balance the patient needs to pay Lines highlighted in green have an overpayment, so the patient is owed money or has a credit on the account The single line highlighted in blue is the selected sale.
Total Outstanding Balance: £210.00	The total outstanding balances of all the individual sales is shown at the bottom of this column.
Create Enter Write Off Payment	Create RefundAmend PaymentPrint ReceiptPrint Full ReceiptPrint VAT Receipt



payments field.

It shows the total sales value.

The total paid against the sale.

The outstanding balance of the sale.

Cales Transactions Summary	Details of Selected Transaction - Sales Items	
Value To Pay 0/07/2020 £10.00 £10.00 0/07/2020 £300.00 £200.00 0/07/2020 £21.31 £0.00 0/07/2020 £50.00 £0.00	Product Description Qty Ref P 7320840000064 Supranettes (20) 1 0 1	Price Discount £10.00
	Details of Selected Transaction - Payments	More Info
	Payment Type Date Paid Amount	Show Transactions Paid by DD or Write-off
		Show Refund/Write Off Reason
tal Outstanding Balance: £210.00	Transfer Payments Total Sales Value: £10.00 ck transaction to transfer payment to, then Total Paid: £0.00	Open Cash Drawer Go To Ordering
	ghlight transaction to transfer payment from Iotal Paid: £0.00 Outstanding Balance of This Sale: £10.00 Send Receipts by Email:	Go To NHS Claims
Create Enter Write Off	Outstanding Balance of This Sale: £10.00 Send Receipts by Email: □	Go To NHS Claims
Create Enter Write Off	Outstanding Balance of This Sale: £10.00 Send Receipts by Email: Create New Sale.	Go To NHS Claims
Create Enter Write Off	Outstanding Balance of This Sale: £10.00 Send Receipts by Email: Create New Sale. Clicking on this button will open the ne	Go To NHS Claims
Create Enter Write Off	Outstanding Balance of This Sale: £10.00 Send Receipts by Email:	Go To NHS Claims ew sale form.
Create Enter Write Off	Outstanding Balance of This Sale: £10.00 Send Receipts by Email:	Go To NHS Claims ewe sale form.
Create Enter Write Off	Outstanding Balance of This Sale: £10.00 Send Receipts by Email:	Go To NHS Claims ewe sale form.
Create Enter Write Off	Create New Sale. Clicking on this button will open the ne Create Sale His private Sale Create Sale Home His private Sale Home His private Sale Create Sale Home His Staffin Sugrand Mekes Bischard Cont Sugrand Cont Sugrand Discription Oty Total Description	Member: Test User
Create Enter Write Off	Create New Sale. Clicking on this button will open the ne Create Sale His private Sale Create Sale Home His private Sale Home His private Sale Create Sale Home His Staffin Sugrand Mekes Bischard Cont Sugrand Cont Sugrand Discription Oty Total Description	Member: Test User

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ate 07/2020 07/2020 07/2020 07/2020	Value £	s Summa <u>£10.00</u> <u>300.00</u> <u>£21.31</u> <u>£50.00</u>	o Pay £10.0 £200.0 £0.0		Product 7320840000	D	Description upranettes (20)		Qty 1	Ref 0	Price £10.00	Discount
					Details of Payment T		Transaction Date		mount		1	More Info Show Transactions
												Paid by DD or Write-off Show Refund/Write Off Reason
otal Outst	anding E	3alance:	£21(Tio	k transaction	ction to tran	payment to, then sfer payment fro tanding Balar	nce of This Sale:		£10.00 £0.00 £10.00	2	Open Cash Drawer Go To Ordering Go To NHS Claims
Create New Sa		Enter	N	rite Off	Crea	ate	Send Re	eceipts by Email: Print	Print F	ull	Print VAT	
		ayment			Refu	nd	Payment	Receipt	Rece		Receipt	
Enter This b	Paym utton ghted	ent. allow sale o	rs you	to er	nter a p	aymer	Payment	Receipt	Recei			
Enter This b highlig patien	Paym utton phted it acco nter p as be	ent. allow sale o ount. ayme	rs you once t	to er the pr	nter a p roducts vill put j	aymer s have	Payment nt agains been ac	Receipt st the	Recei			
Enter This b highlig batien The ei hat ha	Paym utton phted it acco nter p as be	ent. allow sale o ount. ayme	rs you once t ent bu ghligh	to er the pr	nter a p roducts vill put j lue.	aymer s have	Payment nt agains been ac	st the dded to the inst the sa	Recei	T	Receipt here is a ayment	a button on the form that allow
Enter This b highlig batien The ei hat ha hat ha hat ha Manuel Poa	Paym utton ghted t acco nter p as be	ent. allow sale c ount. ayme en hig	rs you once t ent bu ghligh	to er the pr tton v ted b	nter a p roducts vill put p lue.	aymer s have payme £10.00	Payment Int agains been ac ents aga	st the dded to the inst the sa	Recei	Tpttc	Receipt here is a ayment	form that allow f an entire acc
Enter This b nighlig batien The ei hat ha hat ha Menuel Poa Mean Meta NHS Fee	Paym utton ghted t acco nter p as be	allow sale c ount. ayme en hig	rs you once t ent bu ghligh Am	to er the pr tton v ted b	nter a p roducts vill put p lue.	aymer s have payme £10.00	Payment ht agains been ac ents aga Show Entire Balance 3 (Min	Receipt	Recei	T p tc b	Receipt here is a ayment o pay off alance a	form that allow f an entire acc
Enter This b nighlig batien The en hat ha Merel PQ Visa Merel PQ Visa Merel PQ	Paym utton ghted it acco nter p as bea s	ent. allow sale c ount. ayme en hig	rs you once t ent bu ghligh Cash Hospital Voucher F	to er the pr tton v ted b	nter a p roducts vill put p lue.	aymer s have payme £10.00	Payment ht agains been ac ents aga Show Entire Balance 3 (Min 6 .	Receipt	Recei	T p tc b	Receipt here is a ayment o pay off alance a	form that allow f an entire acc at once.
Enter This b highlig patien The ei hat ha Manal PD Wisa Meard Deta NHS Fee £21.31 Vucher A £39.10 Gift	Paym utton ghted t acco nter p as be ter be be ter be ses solution	ent. allow sale c ount. ayme en hig	ent bu ghligh Cash Voucher F 285.60 Other	to er the pr tton v ted b	nter a p roducts vill put p lue.	aymer s have payme £10.00 2 5 8 £10.00	Payment Ant agains been ac been ac aga Show Entire Balance 3 (Min 6 . 9 0	Receipt	Recei	T p tc b	Receipt here is a ayment o pay off alance a Show Er	form that allow f an entire acc at once.
Enter This b highlig batien The ei hat hi e ther Paymer Menuel PDG Visa Mead Dets NHS Fee 521.31 Voucher A Salino Gift Voucher DD/SO-	Paym utton ghted t acco nter p as be ts Debit Card Dom Fee \$5930 Voucher B £5930 Sols Voucher Interest	ent. allow sale c ount. ayme en hig Cheque NHS Repair Voucher E £87.50 Super Saver Returned	rs you once f ent bu ghligh Cash Hospital Voucher F Card Other Card	to er the pr tton v ted b ount to F Amex Corporate	nter a p roducts vill put p lue. Pay:	aymer s have payme £10.00 2 5 8 £10.00	Payment It agains been ac ents aga Show Entire Balance 3 (Min 6 . 9 0 Confirm Amoun Amount	Receipt	Recei	T p tc b	Receipt here is a ayment o pay off alance a Show Er	form that allow f an entire acc at once. htire Balance' Show Entire

Mr M Rutherfud	(6245)								- 🗆
Sales Transa	ctions Summ	ary	Details of Select	ed Transaction -	Sales Items				
Date	Value	To Pay	Product	Description		Qty	Ref	Price	Discount
28/07/2020	£10.00	£10.00	7320840000064	Supranettes (20)		1	0	£10.00	
28/07/2020	£300.00	£200.00							
28/07/2020	£21.31	£0.00							
11/07/2020	£50.00	£0.00							
			Dataila of Colore	a d Tao and ation	Deursente				
			Details of Select	ed transaction -	Payments			_	More Info
			Payment Type	Date	Paid A	mount			Show
									Transactions
									Paid by DD or Write-off
									Show Refund/Write
									Off Reason
									Open Cash
									Drawer
Total Outstan	ding Balance	£210.00	Transfer Payn	nents To	tal Sales Value:		£10.00)	
			ick transaction to trans				£0.00		Go To Ordering
		r	ighlight transaction to t					_	
			0	utstanding Balar	ice of This Sale:		£10.00)	Go To NHS
		_	_	Send Re	ceipts by Email:				Claims
0	E.d.		Orest	A	Duint	Durin 4	F	Delet Mar	
Create New Sale	Enter Paymer	write Off	Create Refund	Amend Payment	Print Receipt	Print Rece		Print VAT Receipt	
New Sale	i ayinei		Refutiu	ayment	Receipt	Nece	apr	Receipt	

Write Off.

The write off button allows you to remove either all the outstanding balance against an individual sale, or part of the outstanding balance.

It is used when sales are entered incorrectly or when the amount left to pay needs to be reduced. For example, a pair of spectacles have been delayed and the supplier is reducing the cost and you are choosing to pass this price reduction on the patient.

Refund.

The refund button is used when a patient returns a purchased item.

You can either give a full refund or a part refund.

Mr M Rutherfu	d (6245)							- 🗆
Sales Trans	actions Sumr	nary	Details of Selecter	d Transaction -	Sales Items			
Date	Value	To Pay	Product	Description		Qty Re	of Price	Discount
28/07/2020	£10.00	£10.00	7320840000064	Supranettes (20)		1 0	£10.00	
28/07/2020	£300.00	£200.00						
28/07/2020	£21.31	£0.00						
11/07/2020	£50.00	£0.00						
			Details of Selecter				_	More Info
			Payment Type	Date	Paid A	mount		Show Transactions Paid by DD or Write-off
								Show Refund/Write Off Reason
								Open Cash Drawer
Total Outstar	nding Balanc	e: £210.00	Transfer Payme		al Sales Value:	£	10.00	Go To
		-	ck transaction to transfe highlic t transaction to tra		m Total Paid:	ł	£0.00	Ordering
			Out	standing Balan	ce of This Sale:	f	10.00	Go To NHS
				-	eipts by Email:			Claims
Create New Sale	Enter Payme		f Create Refund	Amend Payment	Print Receipt	Print Ful Receipt		
ransfer l	Payment	s.			A	D	4	
ransfer	payment	will take a	payment		Amend I	Paymer	IT.	

made against a selected individual sale and move it to another sale.

Amend payment allows you to amend the payments against a sale. This is used to correct errors e.g. the patient said they would pay by card but then the payment failed.



Print Receipt.

Print receipt will cause a receipt to print (or be sent by email) for the highlighted sale.

If more than one sale is selected using the tick boxes, then these sales will be consolidated onto one receipt



Print Full Receipt.

Print full receipt will look through all the sales on the patient account to see if any sales have a receipt pending and will put all pending receipts onto one print out.

Print VAT Receipt.

Print VAT receipt will print a receipt for the highlighted sale and mark it as a VAT receipt.



If you have a cash drawer connected to you receipt printer, then clicking this button will open the drawer but only from the computer physically plugged into the printer.

Go To Ordering

Clicking this button will open the spectacle ordering for this patient.

Go To NHS Claims

Clicking this button will open the NHS claims for this patient.

Creating a sale

On the patient account, click on the 'Create New Sale' button.



The product the patient is purchasing now needs to be entered onto the sale.

This can be done in the following ways.

1. By clicking on one of the till buttons linked to products on your system.



2. By typing in a barcode number or scanning a barcode.

St	aff Member	Charlie Gi	bson	~
Enter Barcode	1	2	3	Enter
Get Frame or Sunspec	4	5	6	
Search By Description	7	8	9	0

Click the enter barcode button and then scan the barcode,

or

Click enter barcode and start typing the barcode number, once you have finished typing click the enter button on the keyboard. 3. Clicking Search by description

Search By Description		
Search By Description	× -	
Search for description:	Go	
Description	SCU Code Price	
2 2 3	Type the product description the pa click Go or click the enter button or	· •
scu co	de: OK Cancel B	
Search By Description	×	
Search for description: hyabak Description Hyabak 10ml	Go SCU Code Price 8470003997744 £10.99	
	Click on the product the patient is pu highlighted and the SCU code of the	÷
SCU Co	de: 8470003997744 OK Cancel z	Then plink of
		Then click ok

Each of the above methods will display the product details and price on the right-hand side.

T n	Home							
sis Plan	NHS Dom	S	taff Member 732084000		ibson	~]	If the patient is purchasing more than one item of any
•	(1st) Low Vision	Enter Barcode	1	2	3	Enter		product, after the product details have been displayed
	Assess Carrier Bag	Get Frame or Sunspec	4	5	6			on the right-hand side, click on the 'Amend Qty' button and then use the number
Qty	(WAĞ) Total	Search By Description	7	8	9	0		buttons to increase the quantity number
			scription:	Supranettes		nd Qty		
		Adjustment	st Price: Reason: ine Total:		0 Total:	£4.10		
	Confirm Sale		Add to S Hom			Add to Sale		

Click Add to Sale. This will add a line item to the sale and will be shown in the bottom left-hand box.

s Contact Lenses Cleaners/ Cloths		Bag (WAG)	Search By	7
Description	Qty	Total	Description	
Supranettes (20)	1	£4.10	De	scription
				Quantity st Price:
				ine Total
Remove Item		Confirm Sale		Add H
	Supranettes (20)	Lenses Cloths Description Qty Supranettes (20) 1	Contact Lenses Cleaners/ Cloths Bag (VVAG) Description Qty Total Supranettes (20) 1 £4.10	Contact Cleaners/ Cloths Bag (V/AG) Description Qty Total Supranettes (20) 1 £4.10

If the patient is purchasing more than one product you can repeat the above steps to add more line items to the sale.

Once you have finished adding all the required products to the sale, click the 'Confirm Sale' button.

Confirm Sale

This will add the sale to the patient account and open the enter payment screen.

Manual PDQ	Discount		A					/ Entire	
			Ame	ount to Pay:		£4.10	Bal	ance	
Visa M'card Delta	Debit Card	Cheque	Cash	Amex	1	2	3	(Minus)	
NHS Fee £21.31	Dom Fee	NHS Repair	Hospital	Corporate	4	5	6	•	
/oucher A £39.10	Voucher B £59.30	Voucher E £67.50	Voucher F £85.60	Voucher	7	8	9	0	
Gift Voucher	Sols Voucher	Super Saver	Other Card			£4.10	Confirm	n Amount	
DD/SO - PS	Interest Free	Returned Cheque	Online Payment	BACS			Clear	Amount	
					Payment	Туре	Amount	_	
					Total er	itered:		£0.00	
Add to Fan					Confir			ncel	

You can now either proceed to take a payment for the sale or you can click the cancel button to leave the sale with a full outstanding balance for the patient to pay at a later date.

Entering a payment against a sale.

If the enter payment screen is not already open after adding a sale to the patient account, you can open the enter payment screen by highlighting the sale you would like to add a payment to.

Date	Value	To Pay	Product	Description		Qty	Ref	Price	Discount
03/08/2020	£4.10	£4.10	7320840000064	Supranettes (20)		1	0	£4.10	
03/08/2020	£70.00	£0.00							
28/07/2020	£10.00	£0.00							
28/07/2020	£300.00	£0.00							
28/07/2020	£21.31	£0.00							
11/07/2020	£50.00	£0.00							
					Single of to high			ne sale	summery lii
			Details of Selec	ted Transaction - Payn					
			Payment Type	Date Paid	Amou	int			

Then by clicking on the 'Enter Payment' button.

Manual PDQ	Discount		Am	ount to Pay:		£4.10		v Entire ance	
Visa M'card Delta	Debit Card	Cheque	Cash	Amex	1	2	3	(Minus)	
NHS Fee £21.31	Dom Fee	NHS Repair	Hospital	Corporate	4	5	6	•	
Voucher A £39.10	Voucher B £59.30	Voucher E £67.50	Voucher F £85.60	Voucher	7	8	9	0	
Gift Voucher	Sols Voucher	Super Saver	Other Card			£4.10	Confirm	n Amount	
DD/SO - PS	Interest Free	Returned Cheque	Online Payment	BACS			Clear	Amount	
					Payment	Туре	Amount		
					Total er	ntered:		£0.00	
Add to Fam Payment					Confir	m Total	Ca	ancel	

Once the enter payment screen has opened click on the payment method the patient is using.



Once selected the payment method button will turn light blue.

The full amount outstanding will be displayed at the top of the screen and in the confirm amount field.

	Amo	ount to Pa	ay:		£4.10		
jue	Cash	Amex		1	2	3	(Minus)
S air	Hospital	Corporate		4	5	6	
her 7.50	Voucher F £85.60	Voucher		7	8	9	0
er er	Other Card				£4.10	Confirr	n Amount
						Clear	Amount

If the patient is paying the full amount that is outstanding, then click on the confirm amount button to add the payment to the confirmation box.

1	2	3	(Minus)
4	5	6	
7	8	9	0
	£4.10	Confirm	n Amount
		Clear	Amount
Payment 1	Гуре	Amount	
Total en	tered:		£0.00
Confirr	m Total	Ca	incel

If the patient is only paying a deposit, e.g. not the full amount, then use the number buttons to enter a different payment amount.

£100.00									
1	2	3	(Minus)						
4	5	6							
7	8	9	0						
	£100.00	Confirm	n Amount						

The new payment amount will now be displayed in the confirm amount field.



Then click confirm amount to add the payment to the confirmation box.

If the patient is using two different payment types, e.g. half card and half cash you can repeat the above steps so that you have two payment lines in the confirmation box.

Once the payment is displayed in the confirm total box. Click Confirm total.

Payment Type	Amount
Visa M'card Delta	£50.00
Total entered:	£50.00
Total entered:	£50.00
Total entered: Confirm Total	£50.00 Cancel

The enter payment screen will close and a payment will have been recorded against the sale on the main patient account form.

🕖 Mr B Rutherfud (6248)							$ \Box$ \times	
Sales Transactions Summary	Details of Selec	ted Transaction	Sales Items					
Date Value To Pay	Product	Description		Qty	Ref	Price	Discount	
29/07/2020 £100.00 £50.00	BGC60	Core plastic Stoc	k MAR coated	1	7666	£22.41		
	BGC60	Core plastic Stoc	k MAR coated	1	7666	£22.41		
	936772	000641		1	7666	£55.18		
	Glazing	Misc Glazing Cha	rge	1	7666	£0.00		
T I I I I								
The amount to pay								
has been reduced								
	Details of Solor	ted Transaction	Paymonte					
	Details of Selec		rayments				More Info	
	Payment Type		Paid Amo	ount	_		Show	
	Visa M'card Delta	04/08	/2020		£50.00		Transactions	
							-	
							The payment	has
							been recorde	d
							against the s	
							against the sa	ale
						· / L		
Total Outstanding Balance: £50.00	Transfer Payr	nents To	tal Sales Value:		£100.00		Go To	
	Tick transaction to trans highlight transaction to	sfer payment to, ther	Total Paid:		£50.00		Ordering	
		utstanding Balar			£50.00			
	0	-	L	_	£50.00		Go To NHS Claims	
		Send Re	ceipts by Email:				Claims	
Create Enter	Create	Amend	Print	Print	Full	Print VAT		
New Sale Payment Write Of	ff Refund	Payment	Receipt	Rece		Receipt		

Applying a discount to a sale

There are 3 ways to discount a sale. Two methods are available on the date the sale is entered onto the system. The third option is used on a date after the sale was added to the patient account.

Applying a discount when creating a new sale

On the Create New Sale screen, select the product the patient is purchasing as normal.



Depending on the set up of your system you may be able to enter an adhoc sale price for a product.

After selecting the product the patient is purchasing, select a reason for the adjustment from the drop-down list as described above. Before clicking Add to sale use the number buttons to enter a new sale price for the product. Then click add to sale as normal.

Applying a discount before entering a payment.

Like the above method this can only be done on the date of the sale.

On the enter payment screen of the patient account, there is a button at the top left called 'Discount'.

Manual PDQ	Discount		Am	ount to Pay:		£221.00		v Entire lance
Visa M'card Delta	Debit Card	Cheque	Cash	Amex	1	2	3	(Minus)
NHS Fee £21.31	Dom Fee	NHS Repair	Hospital	Corporate	4	5	6	
/oucher A £39.10	Voucher B £59.30	Voucher E £67.50	Voucher F £85.60	Voucher	7	8	9	0
Gift Voucher	Sols Voucher	Super Saver	Other Card			£221.00	Confir	n Amount
DD/SO - PS	Interest Free	Returned Cheque	Online Payment	BACS			Clear	Amount
					Payment	Туре	Amoun	t
					Total er	ntered:		£0.00
Add to Fam	nily				Confir	m Total	C.	ancel

Click on the discount button.

οι £	Add Discount			×	
_	Discount Reason:	[NONE]	~		
c	Original Price:	£221.00			2
(Adjusted Price:	£221.00			
		Confirm	Cancel		(
°a	yment			-	5

In the Add Discount window select a discount reason from the drop down.

This new adjusted price will be displayed.

l	Add Discount		×	1
	Discount Reason: Original Price: Adjusted Price:	2nd Pair Sunnies 50%		
	Aujusteu Filce.	Confirm Cancel		

Click Confirm.

The new price will be entered onto the enter payment screen and the main patient account screen will also be amended to match the new adjusted price.

Amo	ount to P	ay:		£110.50		Entire ance
sh	Amex		1	2	3	(Minus)
pital	Corporate		4	5	6	
her F 5.60	Voucher		7	8	9	0
ner Ird				£110.50	Confirm	Amount
		1			Clear /	Mount

Proceed with entering a payment as normal.

Reducing the balance the patient must pay on a sale.

This method is used if a sale needs to be discounted at a later date.

On the main patient account screen, single click to highlight the sale that needs the outstanding balance reducing.

e Rutherre	ıd (6248)							-		
Sales Trans	sactions Sumr	nary	Details of Selec	cted Transaction - Sales Items						
Date	Value	To Pay	Product	Description	Qty	Ref	Price	Discoun	t	
04/08/2020	£110.50	£110.50	005628	MJ225 Rainbow Falls, 63/17/125, 225	1	0	£110.50	2nd Pair	Sunn	
29/07/2020	£100.00	£0.00								
			Details of Selec	ted Transaction - Payments				Мо	ore Info	D
			Details of Selec	ted Transaction - Payments Date Paid Amo	unt					D
			·	-	unt		1	Tran	Show saction	s
			·	-	unt			Tran Paid	Show	s
			·	-	unt			Tran Paid W	Show Isaction	s or

Click the 'Write Off' button.

6				Outs
	Create New Sale	Enter Payment	Write Off	Create Refund

In the write off window, enter the amount the balance needs to be reduced by.

Confirm Writeoff	×
Amount: 110.50 Restore to Stock Reason: OK Cancel	If you are using the i-Clarity stock module, then tick or untick this box as applicable.

Then type a reason for the write off and click 'OK'.

The balance outstanding will be reduced, and a write off will be entered against the sale to show the amount to pay was reduced.

Date	Value	To Pay	
04/08/2020	£110.50	£60.00	

Details of Selected Transaction - Payments								
Payment Type	Date Paid	Amount						
Write Off	04/08/2020	£50.50						

Refunding a Sale in Full.

This method of refund is used if a patient returns a product and is owed a full refund.

7 Mr M Brown (6251)				- 0	\times				
Sales Transactions Summary	Details of Selected Trans	action - Sales Items							
Date Value To Pay	Product Descrip		Qty Ref	Price Discount					
04/08/2020 £195.00 £0.00 □	936644 MJ Bryo	n Bay, 62-19-125, 746-03F - M	1 1 0	£195.00					
		_							
	le of Sunglasses th	nat							
ha	ve been returned.								
	Details of Selected Trans	action - Payments		More Info					
	Payment Type		mount	Show	1				
	Visa M'card Delta	04/08/2020	£195.00	Transactions Paid by DD or Write-off					
				Show Refund/Write Off Reason					
				Open Cash Drawer					
Total Outstanding Balance: £0.00	Transfer Payments	Total Sales Value:	£195.00	Go To					
	Fick transaction to transfer paymen highlight transaction to transfer pa		£195.00						
Outstanding Balance of This Sale: £0.00									
	S	end Receipts by Email:		Claims					
Create Enter New Sale Payment Write Of	f Create Ame Refund Payr		Print Full Receipt	Print VAT Receipt					
					-				

Tick the box next to the sale that needs refunding.

Ø Mr M Brown (6251)												
	Sales Transa	actions Summ	nary									
	Date	Value	To Pay									
	04/08/2020 £195.00 £0.00											

Click on the button 'Refund Selected Sale'



This will open a confirmation window, which also gives you the option to return a product to stock.

Click 'Yes' to proceed.

5	Issue Refund	×	
1	Are you sure you want issue a refund for £195.00?	•	ď
V	Return to stock Yes No]	

A refund for the selected sale will be entered onto the system and the enter payment screen will open automatically.

If you are adding the refund to the patient account so it is ready to return the payment when the patient arrives then you can click 'Cancel'.



On the enter payments screen select the method that is being used to return the payment to the patient.

Manual PDQ	Discount		Ame	ount to Pay:		£195.00		
Visa M'card Delta	Debit Card	Cheque	Cash	Amex	1	2	3	(Minus
					4	5	6	
					7	8	9	0
		Super Saver	Other Card	HO Refund		£195.00	Confir	m Amount
DD/SO - PS	Interest Free	Returned Cheque	Online Payment	BACS			Clea	r Amount
					Payment	Туре	Amour	nt
					Total er	ntered:		£0.0

The amount to be refunded will be shown as a minus figure.

Click confirm amount and confirm total.

Refunding part of a sale

This method is used if the patient is due a refund for part of a previous sale.

Click the button 'Create Refund'



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This will open the create refund screen. It is like the create sale screen, but the price of all products entered with be preceded with a minus.

Using the same methods as when creating a sale, select the product that needs to be refunded.

	Staff Member 732084000	r. Charlie Gib	oson	~	The s scree Click	n.				appea	ar on tl	ne rig	ht-ha	and s	ide of th
Enter Barcode	1	2	3	Enter			-			line to	the re	fund.			
Get Frame or Sunspec	4	5	6		🕖 Create New	Sale		-	_						- 🗆 ×
Search By 7 8 9				0	Create Refund Home								£	4.	10
D	Description: Supranettes (20) Quantity: 1 Amend Qty				Supranett es (20)	Menicare Plus 250ml	Blephaclea n 20 Sterile Wipes	Fees Blephasol 100ml	Analysis Lens Plan Fee	NHS Dom (1st)	Enter	Staff Member 732084000	00064		
Adjustmer	List Price:	-		£4.10	Misc Acc	NHS Repair		Selvyt Cloth 10*10		Low Vision Assess	Get Frame or	1	2	3 6	Enter
d	Line Total: Add to Re Hom			d to Refund	Frames.	Lenses	Contact Lenses	Cleaners/ Cloths	Qty	Carrier Bag (WAG) Total	Sunspec Search By Description	7	8	9	0
_				di.	7320840		upranettes		-1	-4.10	D	escription: Quantity:		Amer	nd Qty
								Adjustme	List Price:	1	0 Total:	£0.00			

Once all the products have been added to the refund

click Confirm refund.

The enter payment screen will open.

Select the payment method being used to return the money to the patient.

Cancel Refund

Click confirm amount and confirm total.

The price of the product to be refunded can be amended by using the number buttons if necessary

Add to Refund

Add to Refund -

Confirm Refund