i-Clarity

The Point of Sale Module
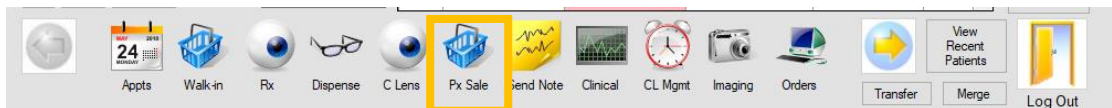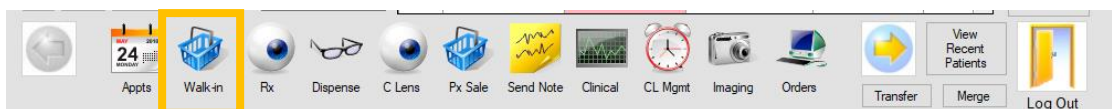### i-Clarity Version 3.3.2

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.
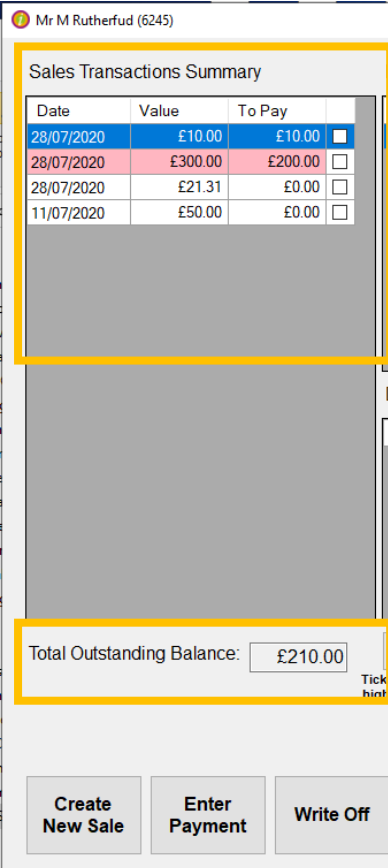

2. **Walk-in Sales**. This is accessed by clicking on the 'Walk in' icon. The form that opens will ignore the active patient record.

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.

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 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.

The total outstanding balances of all the individual sales is shown at the bottom of this column.

The highlighted sale.

Full details of the products included in the highlighted sale will be displayed in the top right box 'Details of Selected Transactions – Sale items'

Any payments that have been made against this sale will be show in the bottom right hand box 'Details of selected Transaction – Payments'

A calculation of the highlighted sale is shown below the payments field.

It shows the total sales value.

The total paid against the sale.

The outstanding balance of the sale.

Create New Sale.

Clicking on this button will open the new sale form.

This form provides you with the ability to select the products that the patient is purchasing.

Enter Payment.

This button allows you to enter a payment against the highlighted sale once the products have been added to the patient account.

The enter payment button will put payments against the sale that has been highlighted blue.

There is a button on the enter payment form that allows you to pay off an entire account balance at once.

'Show Entire Balance'

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.

Transfer Payments.

Transfer payment will take a payment made against a selected individual sale and move it to another sale.

Amend Payment.

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.

Send Receipts by Email

If this box is ticked, then receipts will be sent to the patient's email address rather than being printed on the receipt printer.

...saction - Sales Items

...ption	Qty	Ref	Price	Discount
...ettes (20)	1	0	£10.00	

Details of Selected Transaction - Payments

Payment Type	Date Paid	Amount

More Info

Show Transactions Paid by DD or Write-off

Show Refund/Write Off Reason

Open Cash Drawer

Go To Ordering

Go To NHS Claims

Total Outstanding Balance: £210.00

Transfer Payments
Tick transaction to transfer payment to, then highlight transaction to transfer payment from

Total Sales Value: £10.00
Total Paid: £0.00
Outstanding Balance of This Sale: £10.00
Send Receipts by Email: ☐

Create New Sale	Enter Payment	Write Off	Create Refund	Amend Payment	Print Receipt	Print Full Receipt	Print VAT Receipt	

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

Date	Value	To Pay	
28/07/2020	£10.00	£10.00	☑
28/07/2020	£300.00	£0.00	☑
......	.....	....	☐

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.

More Info.

Clicking more info will display more information about the sales such as the cost price of the products and which i-Clarity user entered the sale and the payment. If you have a multibranch system, it will also display the branch the sale and payment are accredited to.

Show transactions paid by DD or Write-Off.

Transactions that are paid in full by the type Direct debit/standing order or transactions that have been written off in full are hidden by default. Clicking this button will display the transactions in the sales summary list of the patient account.

Show Refund Write-Off Reason.

When entering a write off or a refund, a reason must be entered. Clicking this button will show the reason of the selected refund or write off.

Open Cash Drawer

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.

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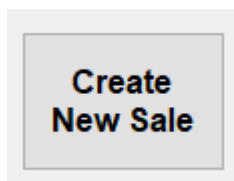
The product the patient is purchasing now needs to be entered onto the sale.

This can be done in the following ways.

1. By clicking on one of the till buttons linked to products on your system.
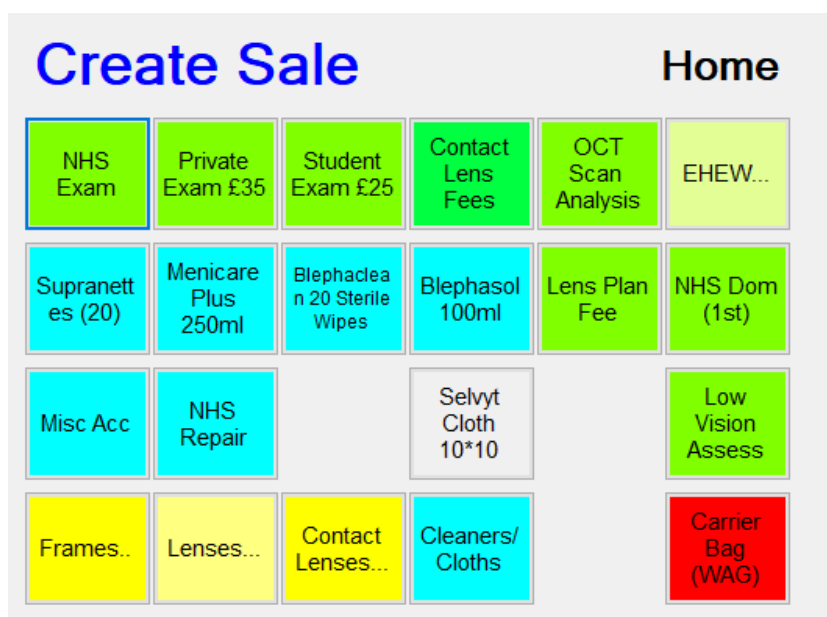
2. By typing in a barcode number or scanning a barcode.
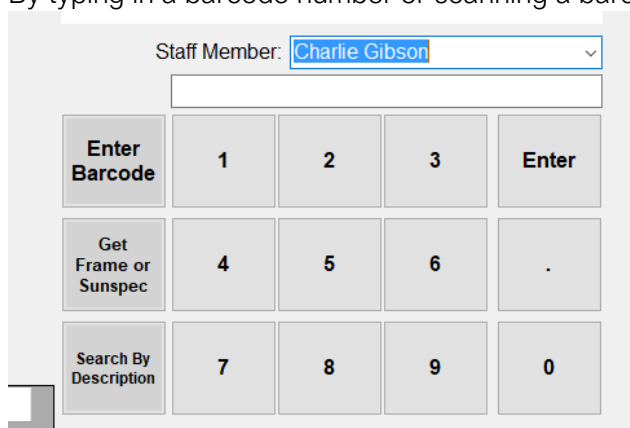
Click the enter barcode button and then scan the barcode,

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

Type the product description the patient is purchasing and click Go or click the enter button on the keyboard

Click on the product the patient is purchasing so that it is highlighted and the SCU code of the product is displayed
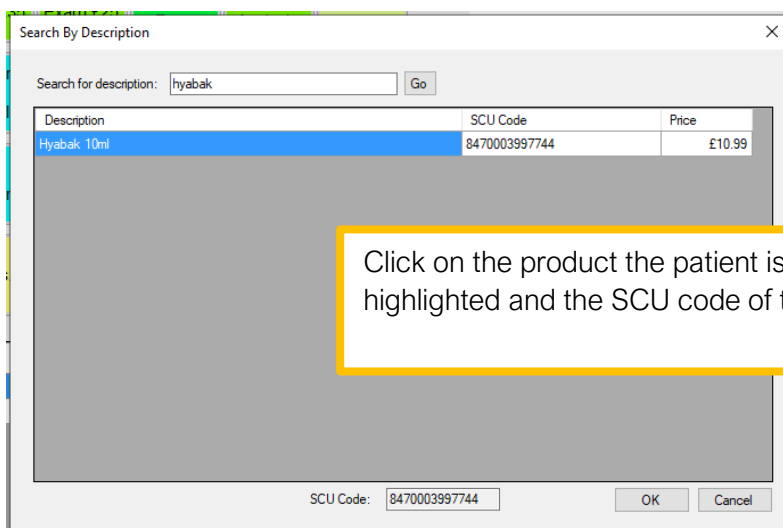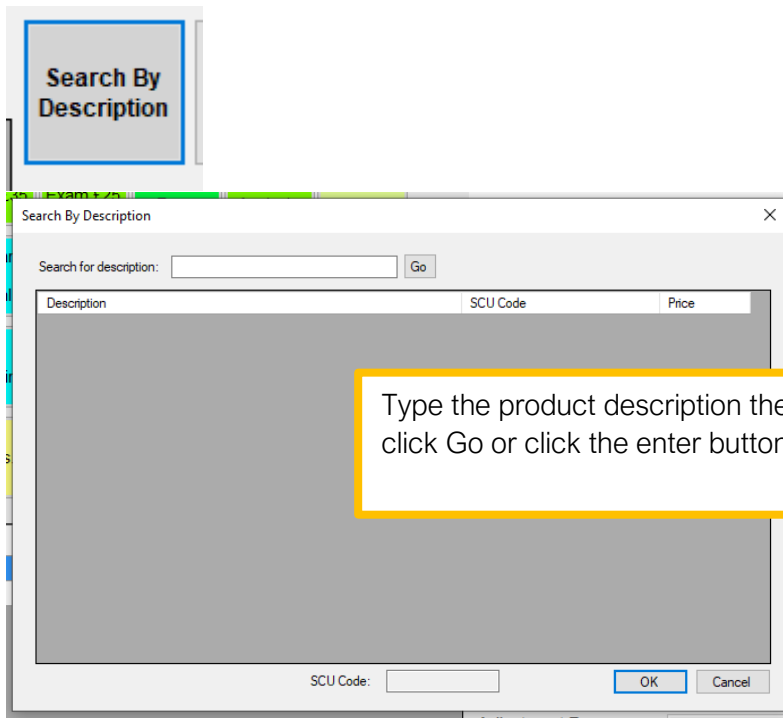
Then click ok

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

If the patient is purchasing more than one item of any product, after the product details have been displayed on the right-hand side, click on the 'Amend Qty' button and then use the number buttons to increase the quantity number

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

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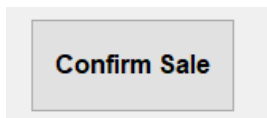
This will add the sale to the patient account and open the enter payment screen.

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.

Single click on the sale summery line to highlight blue

Then by clicking on the 'Enter Payment' button.
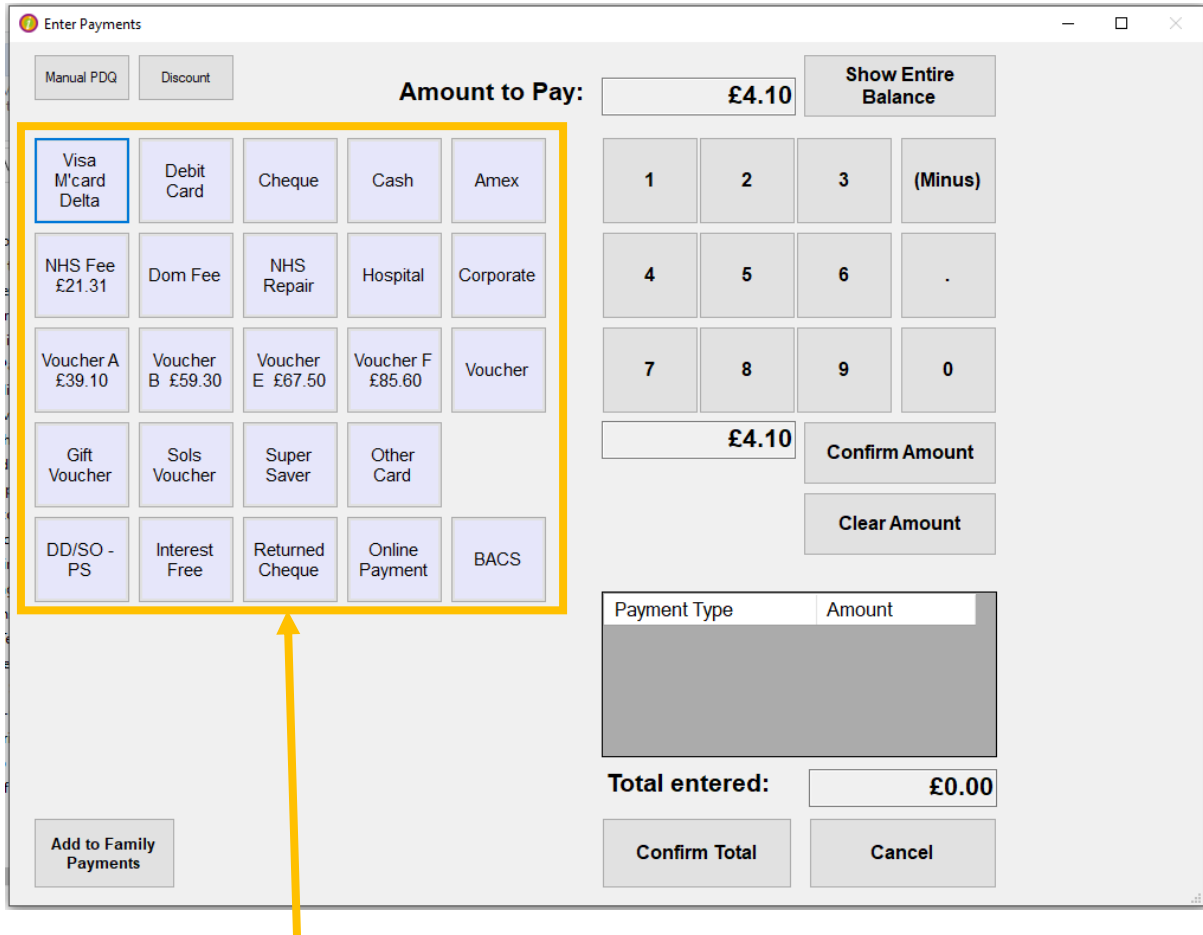
Enter Payment

Once the enter payment screen has opened click on the payment method the patient is using.
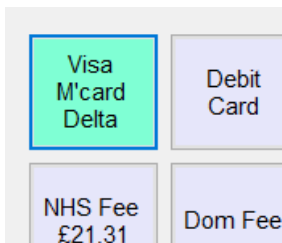
Once selected the payment method button will turn light blue.

The full amount outstanding will be displayed at the top of the screen and in the confirm amount field.
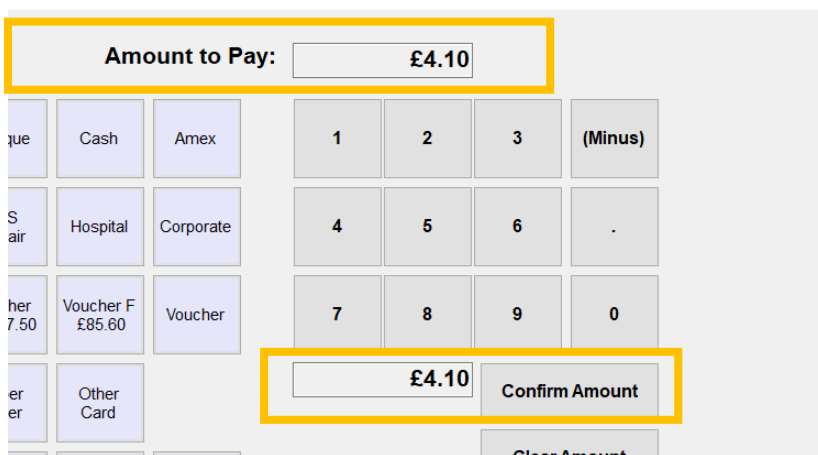
If the patient is paying the full amount that is outstanding, then click on the confirm amount button to add the payment to the confirmation box.

1	2	3	(Minus)
4	5	6	.
7	8	9	0

£4.10   **Confirm Amount**

Clear Amount

Payment Type	Amount

Total entered: £0.00

Confirm Total   **Cancel**

1	2	3	(Minus)
4	5	6	.
7	8	9	0

£0.00   **Confirm Amount**

Clear Amount

Payment Type	Amount
Visa M'card Delta	£4.10

Total entered: £4.10

Confirm Total   **Cancel**

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 Amount**

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

£100.00

1	2	3	(Minus)
4	5	6	.
7	8	9	0

£50.00   **Confirm Amount**

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

Confirm Total   **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)

Sales Transactions Summary

Date	Value	To Pay
29/07/2020	£100.00	£50.00 ☐

Details of Selected Transaction - Sales Items

Product	Description	Qty	Ref	Price	Discount
BGC60	Core plastic Stock MAR coated	1	7666	£22.41	
BGC60	Core plastic Stock MAR coated	1	7666	£22.41	
936772	000641	1	7666	£55.18	
Glazing	Misc Glazing Charge	1	7666	£0.00	

The amount to pay has been reduced

Details of Selected Transaction - Payments

Payment Type	Date Paid	Amount
Visa M'card Delta	04/08/2020	£50.00

More Info

Show Transactions Paid by DD or

The payment has been recorded against the sale

Total Outstanding Balance: £50.00

Transfer Payments
Tick transaction to transfer payment to, then highlight transaction to transfer payment from

Total Sales Value: £100.00
Total Paid: £50.00
Outstanding Balance of This Sale: £50.00
Send Receipts by Email: ☐

Go To Ordering

Go To NHS Claims

Create New Sale	Enter Payment	Write Off	Create Refund	Amend Payment	Print Receipt	Print Full Receipt	Print VAT 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.

Tick the Adjustment Reason box and select an adjustment from the drop-down list.

This will apply the discount that is set up in the maintenance of your i-Clarity system.

Click add to sale and complete 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'.

Click on the discount button.

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

This new adjusted price will be displayed.


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.
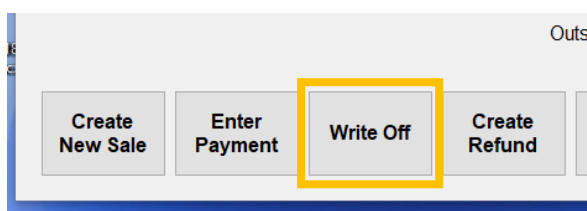
Proceed with entering a payment as normal.

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.
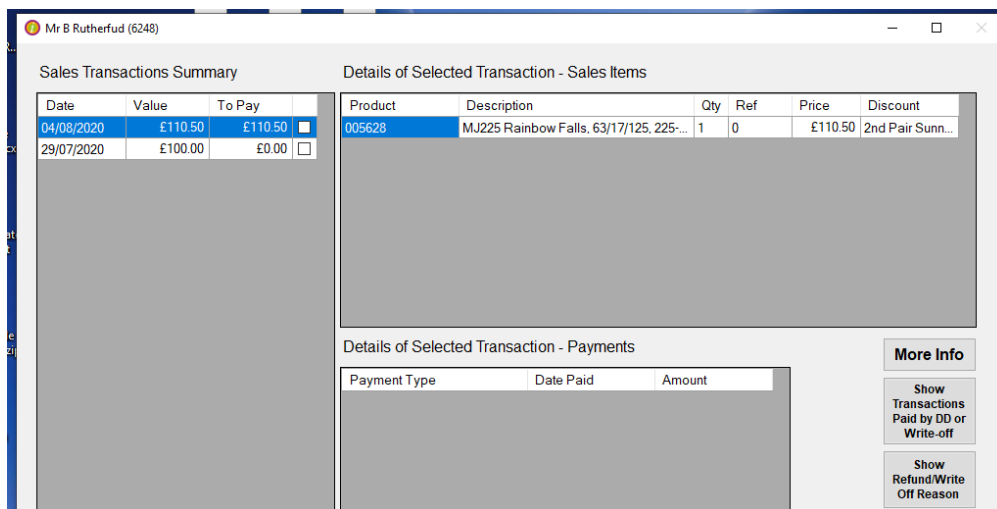
Click the 'Write Off' button.

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

If you are using the i-Clarity stock module, then tick or untick this box as applicable.
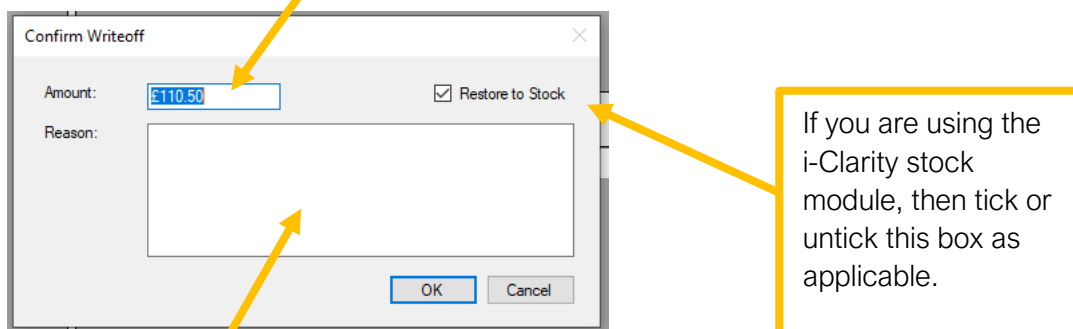
Then type a reason for the write off and click 'OK'.

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

Refunding a Sale in Full.

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

Sale of Sunglasses that have been returned.

Tick the box next to the sale that needs refunding.

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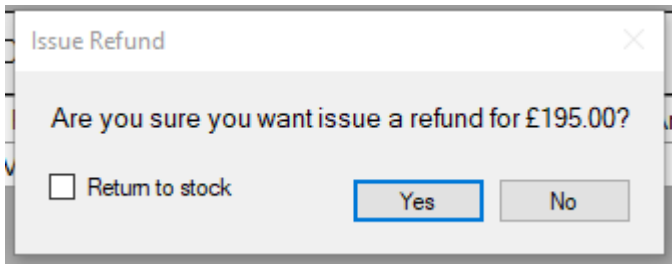
A refund for the selected sale will be entered onto the system and the enter payment screen will open automatically.

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'.
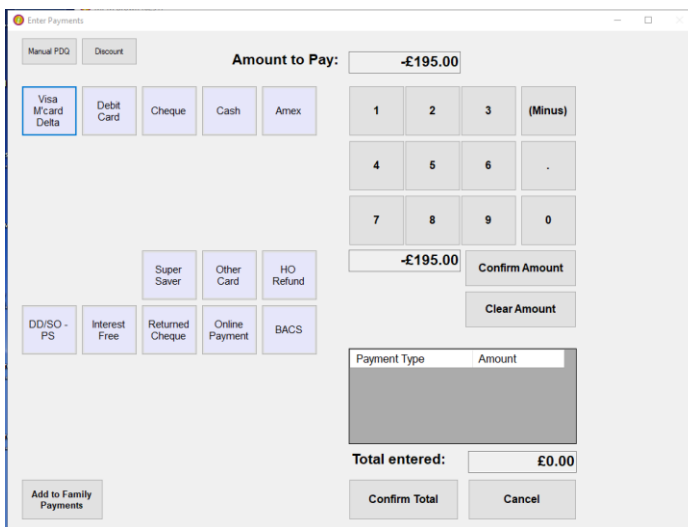
This will close the enter payment screen.

The refund will be show on the patient account, highlighted in green because the patient is still owed the money for this refund. When the patient does come in for the refund, select the refunded sale line and click enter payment and follow the steps described below.

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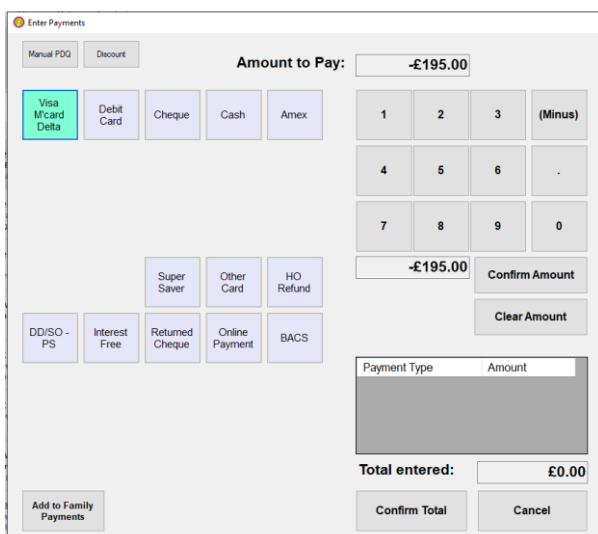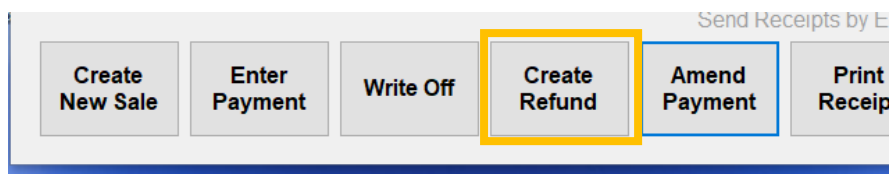

The amount to be refunded will be shown as a minus figure.

Click confirm amount and confirm total.
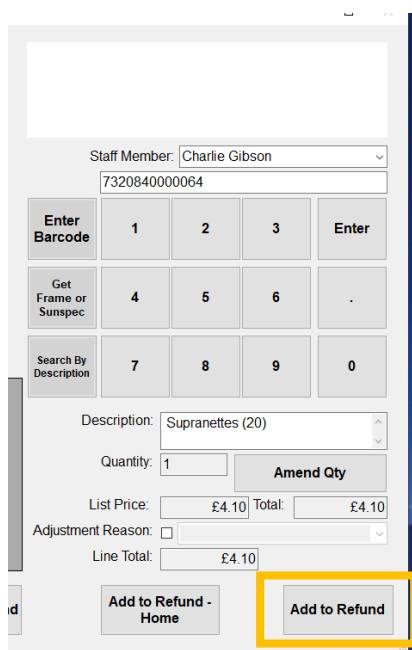
Refunding part of a sale

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

Click the button 'Create Refund'

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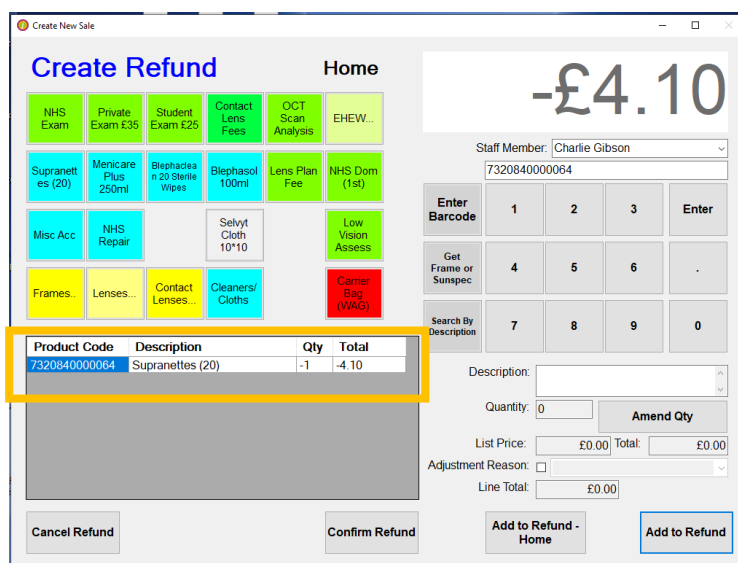
Using the same methods as when creating a sale, select the product that needs to be refunded.

The selected product will appear on the right-hand side of the screen.

Click 'Add to Refund'

This will add the product line to the refund.

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.

Click confirm amount and confirm total.

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