


Entering a payment against a single sale

Click to highlight the sale with the outstanding balance.

 Miss J Simmons (6287)

Sales Transactions Summary

Date	Value	To Pay	
21/08/2020	£370.00	£370.00	<input type="checkbox"/>

Details of Selected Transaction - Sales Items

Product	Description	Qty	Ref	Price
730-216	Vx Physio 2.0 Short 1.5 Cz easy UV	1	7689	£142.50
730-216	Vx Physio 2.0 Short 1.5 Cz easy UV	1	7689	£142.50
933317	NY 85	1	7689	£85.00
Glazing	Misc Glazing Charge	1	7689	£0.00

Details of Selected Transaction - Payments

Payment Type	Date Paid	Amount

Total Outstanding Balance: **Transfer Payments** Total Sales Value:

Tick transaction to transfer payment to, then highlight transaction to transfer payment from Total Paid:

Outstanding Balance of This Sale:

Click the enter payment button.

Enter Payment

Write Off


Create Refund

Amend Payment

Print Receipt

Send Receipts by Email:

Select the payment type the being used to pay.

 Enter Payments

Manual PDQ

Discount

Amount to Pay

Visa
M'card
Delta

Debit Card

Cheque

Cash

Amex

NHS Fee

Dent Fee

NHS

Hospital

Corporate

Using the number buttons type in the amount the patient is paying.

Amount to Pay: £370.00 **Show Entire Balance**

ash Amex

spital Corporate

cher F 15.60 Voucher

ther ard

1 2 3 (Minus)

4 5 6 .

7 8 9 0

£100.00 **Confirm Amount**

Click confirm amount

Confirm Amount

The amount the patient is paying will be entered into the payment confirmation box.

When entering a deposit, the remaining balance to be paid will be displayed in the field next to the 'Confirm Amount' button.

Click confirm total.

The enter payment screen will close.

£270.00 **Confirm Amount**

Clear Amount

Payment Type	Amount
Visa M'card Delta	£100.00

Total entered: £100.00

Confirm Total **Cancel**

The deposit payment will have been entered against the sale, but the sale is still red as the whole balance has not been paid.

Sales Transactions Summary				Details of Selected Transaction - Sales Items				
Date	Value	To Pay		Product	Description	Qty	Ref	Price
21/08/2020	£370.00	£270.00	<input type="checkbox"/>	730-216	Vx Physio 2.0 Short 1.5 Cz easy UV	1	7689	£142.50
				730-216	Vx Physio 2.0 Short 1.5 Cz easy UV	1	7689	£142.50
				933317	NY 85	1	7689	£85.00
				Glazing	Misc Glazing Charge	1	7689	£0.00

Details of Selected Transaction - Payments		
Payment Type	Date Paid	Amount
Visa M'card Delta	21/08/2020	£100.00

Total Outstanding Balance: **Transfer Payments** Total Sales Value:

Tick transaction to transfer payment to, then highlight transaction to transfer payment from Total Paid:

Outstanding Balance of This Sale:

When the patient returns to pay the balance, click to highlight the sale with the outstanding balance.

Click enter payment.

Enter Payments

Manual PDQ **Amount to Pay:** **Show Entire Balance**

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		<input type="text" value="£270.00"/>			
DD/SO - PS	Interest Free	Returned Cheque	Online Payment	BACS	Confirm Amount			
					Clear Amount			

Payment Type	Amount

Total entered:

Confirm Total **Cancel**

The amount remaining to pay will be shown.

Select the payment type being used to pay the balance.

Click confirm amount, then confirm total.

The second payment will be recorded against the sale, the balance will be clear, and the sale line will now be white.

Sales Transactions Summary

Date	Value	To Pay	
21/08/2020	£370.00	£0.00	<input type="checkbox"/>

Details of Selected Transaction - Sales Items

Product	Description	Qty	Ref	Price
730-216	Vx Physio 2.0 Short 1.5 Cz easy UV	1	7689	£142.50
730-216	Vx Physio 2.0 Short 1.5 Cz easy UV	1	7689	£142.50
933317	NY 85	1	7689	£85.00
Glazing	Misc Glazing Charge	1	7689	£0.00

Details of Selected Transaction - Payments

Payment Type	Date Paid	Amount
Visa M'card Delta	21/08/2020	£100.00
Visa M'card Delta	21/08/2020	£270.00

Total Outstanding Balance:

Transfer Payments

Total Sales Value:

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

Total Paid:

Outstanding Balance of This Sale:

Entering a deposit against more than one sale

On the enter payment screen the button 'show entire balance' will group together the outstanding balance of multiple sales.

Sales Transactions Summary

Date	Value	To Pay	
22/08/2020	£20.49	£20.49	<input type="checkbox"/>
22/08/2020	£275.00	£275.00	<input type="checkbox"/>
22/08/2020	£35.00	£35.00	<input type="checkbox"/>

Total Outstanding Balance:

Amount to Pay: **Show Entire Balance**

Cash Amex 1 2 3 (Minus)

Amount to Pay:

Cash Amex 1 2 3 (Minus)

Amount to Pay:

Cash Amex 1 2 3 (Minus)

4 5 6 .

7 8 9 0

Confirm Amount

Other Card

Now the sales are grouped together, select the payment type, and use the number buttons to enter the amount the patient is leaving as a deposit against all the transactions.

i-Clarity will pay off the sales it can in full starting with the oldest, any remaining money will be paid against the sale it cannot pay off in full.

A worked example of this scenario is when a patient has an eye examination fee added to their account, followed by a dispense and then a sundry item.

Sales Transactions Summary

Date	Value	To Pay	
22/08/2020	£20.49	£20.49	<input type="checkbox"/>
22/08/2020	£275.00	£275.00	<input type="checkbox"/>
22/08/2020	£35.00	£35.00	<input type="checkbox"/>

Sundry Item

Dispense

Eye Exam Fee

On the enter payment screen click 'show entire balance'.

The screenshot shows a payment interface. At the top, it says "Amount to Pay:" followed by a text box containing "£20.49". To the right of this is a button labeled "Show Entire Balance". Below this, there are two rows of buttons. The first row contains "Cash" and "Amex" buttons. The second row contains four buttons: "1", "2", "3", and "(Minus)".

This will group together the outstanding balances.

The screenshot shows the same payment interface as above, but the "Amount to Pay" text box now displays "£330.49". The "Show Entire Balance" button is no longer visible. The "Cash" and "Amex" buttons are still present, and the "1", "2", "3", and "(Minus)" buttons are also present. The "1" button is highlighted with a blue border.

Select the payment type the patient is using.

The screenshot shows a selection screen for payment types. There are five buttons arranged horizontally: "Visa M'card Delta", "Debit Card", "Cheque", "Cash", and "Amex".

Use the number buttons to enter the amount the patient is paying as a deposit.

The screenshot shows a numeric keypad with four columns and three rows of buttons. The first row contains "1", "2", "3", and "(Minus)". The second row contains "4", "5", "6", and ".". The third row contains "7", "8", "9", and "0". The "0" button is highlighted with a blue border. Below the keypad, there is a text box displaying "£150.00" and a button labeled "Confirm Amount".

Click confirm amount, then confirm total.

Sales Transactions Summary

Date	Value	To Pay	
22/08/2020	£20.49	£0.00	<input type="checkbox"/>
22/08/2020	£275.00	£180.49	<input type="checkbox"/>
22/08/2020	£35.00	£0.00	<input type="checkbox"/>

The eye exam will be paid in full; the sundry item will be paid in full and then the remaining money will be entered as a deposit against the dispense.

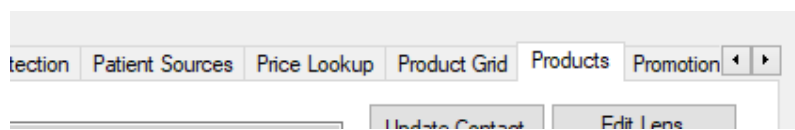
Entering a Pre-payment

You can use this method to enter a payment onto i-Clarity so the patient has a credit on their account that can be used to pay for products in the future.

This can be useful for patients who want to build up a credit on the account to pay for spectacles in the future. Or for practices who prefer to enter the dispense details onto i-Clarity after the patient has left but need to take a deposit and provide a payment receipt whilst the patient is in the practice.

Setting up your system to take pre-payments

Open the maintenance module, and navigate to the products tab.



Complete the following fields with the information shown.

Product Code	<input type="text" value="PrePayment"/>	<input type="button" value="Change"/>
Last Updated on		
Description	<input type="text" value="PrePayment"/>	
Product Group	<input type="text" value="Other"/>	
Analysis Type	<input type="text" value="Other"/>	
VAT Category	<input type="text" value="Fully VATable"/>	
Cost Price	<input type="text" value="0.00"/>	
Standard Price	<input type="text" value="0.00"/>	
Fee Type	<input type="text" value="[None]"/>	

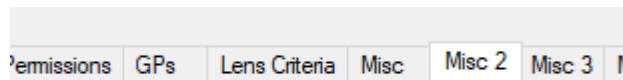
Click save

Standard Price	<input type="text" value="0.00"/>	
Fee Type	<input type="text" value="[None]"/>	
<input type="button" value="New"/>	<input type="button" value="Save"/>	<input type="button" value="Delete"/>
<input type="button" value="Copy"/>		

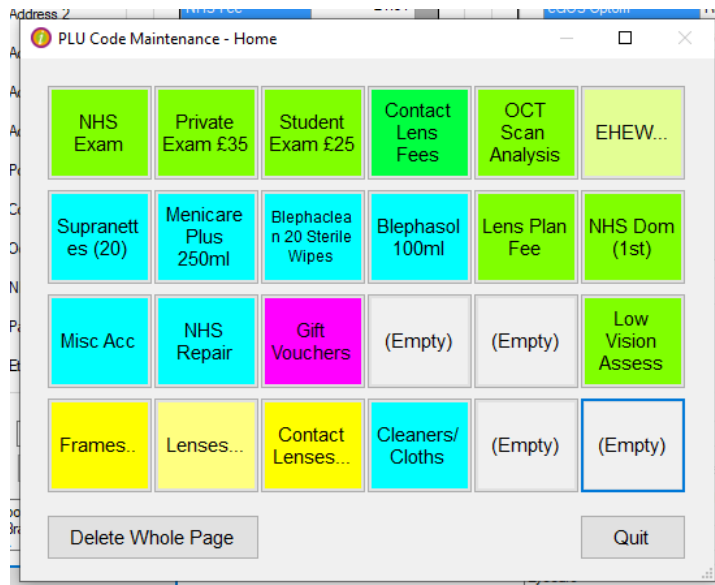
Close the maintenance module and click the 'update products' button on the main screen.



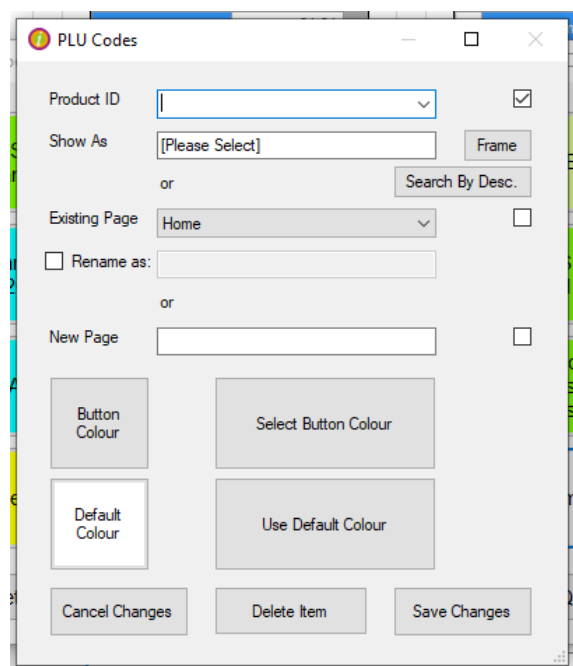
Return to the maintenance module and navigate to the 'Misc 2' tab.



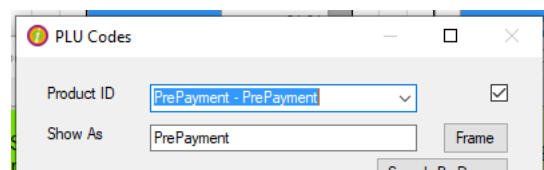
Click on the 'PLU Code Maintenance' button.



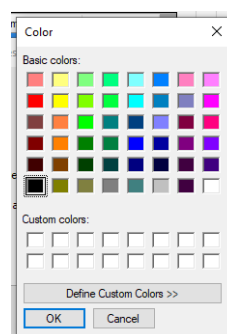
Click on an empty till button.



Start typing the product ID prepayment, then select the product ID from the drop down.



Click 'Select Button Colour'

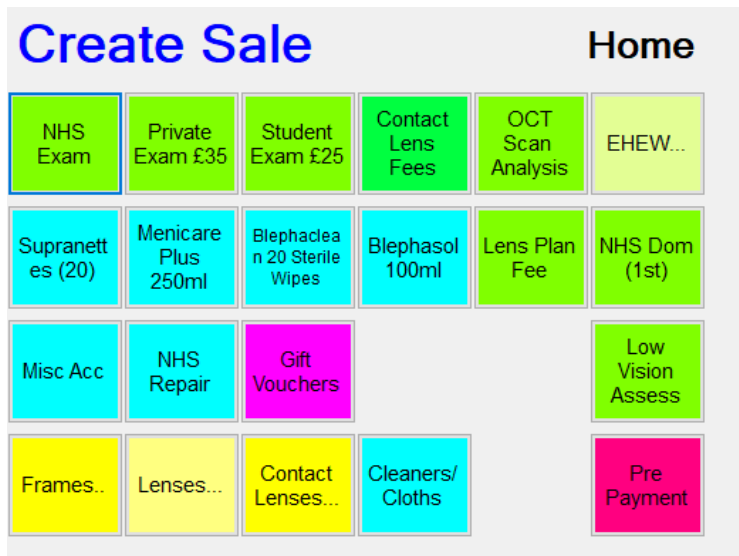


Select a colour for the button and click ok.

Then click Save Changes.

Entering a pre-payment on a patient account

Click 'Create New' sale.



Click on the pre-payment button.

Staff Member: Charlie Gibson

PrePayment

Enter Barcode: 1 2 3 Enter

Get Frame or Sunspec: 4 5 6 .

Search By Description: 7 8 9 0

Description: PrePayment

Quantity: 1 Amend Qty

List Price: £0.00 Total: £0.00

Adjustment Reason: [Dropdown]

Line Total: £0.00

Add to Sale - Home Add to Sale

This will enter the details of the prepayment product down the right-hand side of the create new sale screen.

Leave the prepayment sale price as zero.

Click 'Add to Sale'.

Click 'Confirm Sale'.

On the enter payment screen, select the payment method the patient is using to pay.

Enter Payments

Manual PDQ Discount

Amount to Pay

Visa M'card Delta Debit Card Cheque Cash Amex

Use the number buttons to enter the amount the patient is paying.

The screenshot shows a payment interface. At the top, there is a label "Amount to Pay:" followed by a text box containing "£0.00" and a button labeled "Show Entire Balance". Below this is a numeric keypad with buttons for digits 1-9, a decimal point, and a "(Minus)" button. The keypad is highlighted with a yellow border. At the bottom of the keypad, there is a text box containing "£50.00" and a button labeled "Confirm Amount".

Click confirm amount.

When the system prompts you about entering an overpayment, click 'yes'.

The screenshot shows a dialog box titled "Overpayment" with a close button (X) in the top right corner. Inside the dialog, there is a yellow warning triangle icon and the text "Are you sure you want to enter an overpayment?". At the bottom of the dialog, there are two buttons: "Yes" and "No".

The screenshot shows a payment summary table with two columns: "Payment Type" and "Amount". The first row is highlighted in blue and contains "Visa M'card Delta" and "£50.00". Below the table, there is a label "Total entered:" followed by a text box containing "£50.00". At the bottom, there are two buttons: "Confirm Total" and "Cancel".

Click 'Confirm Total'.

This creates a sale line in the summary that will be highlighted green because the patient is owed money.

22/08/2020	£0.00	£-50.00	<input type="checkbox"/>
------------	-------	---------	--------------------------

Once you have entered a sale you can use the transfer payment feature to move the money from the pre-payment to the new sale.

Sales Transactions Summary

Date	Value	To Pay	
22/08/2020	£245.00	£245.00	<input type="checkbox"/>
22/08/2020	£0.00	£-50.00	<input type="checkbox"/>

Tick the box next to the sale you would like to move the money to, and then click to highlight the pre-payment line.

Date	Value	To Pay	
22/08/2020	£245.00	£245.00	<input checked="" type="checkbox"/>
22/08/2020	£0.00	£-50.00	<input type="checkbox"/>

Click the 'transfer payments' button.

Transfer Payments Total

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

Click Transfer.

Transfer Payment

Transfer whole amount
 Transfer this amount

Date	Value	To Pay	
22/08/2020	£245.00	£195.00	<input type="checkbox"/>
22/08/2020	£0.00	£0.00	<input type="checkbox"/>

The balance on the dispense has been reduced and the prepayment line now shows zero overpayment.