Add a Deposit - Via Invoices & Credits
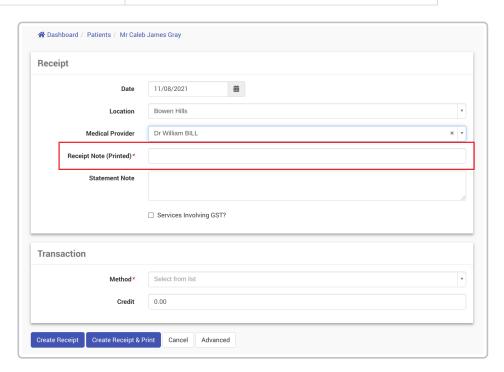
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Take a Deposit

You can process a deposit taken from a patient without raising an invoice. This can be taken as a credit amount either specifically associated with an Account or as a standalone amount.

1. Search for a patient.

2. Click **Show**.

3. In the Main Menu, click **Invoices & Credits**.

    a. The Invoices and Credits screen will display and will default to 'Today'.

4. Select the **New Deposit** button and the add new deposit screen will open.

5. Complete fields using the table below as a reference.

Field	Description
Date	Will default to the current date.
Location	Location against the receipt being taken
Medical Provider	Medical Provider against the receipt is allocated
Receipt Note (Printed)	This field can be made mandatory/not. Please refer to the global setting
Statement Note	Statement note

1. Subsequent options include:

    a. Select the Create Receipt button - This will receipt the payment.

    b. Select the Receipt & Print button - this will receipt the payment and open a PDF for printing.

Note: If the patient wishes to make the deposit payment by more than one payment method, select the **Advanced** button at the bottom of the screen. This will allow for multiple payment methods to be applied.