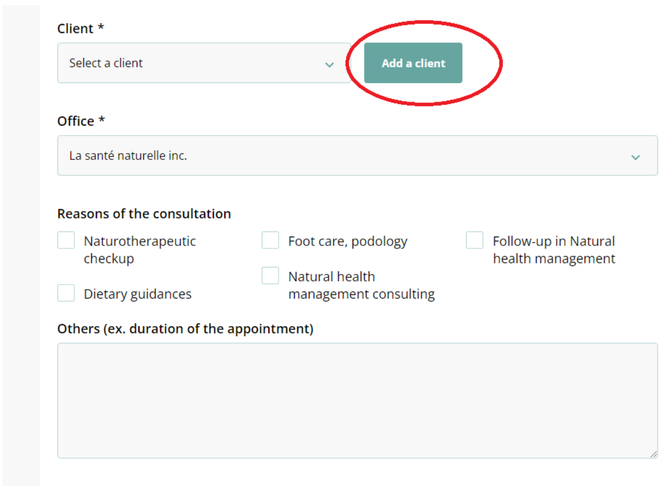
Electronic receipts

To start, please log in to your ***member's access***.

Select ***receipts***, *then* ***create an electronic receipt***.

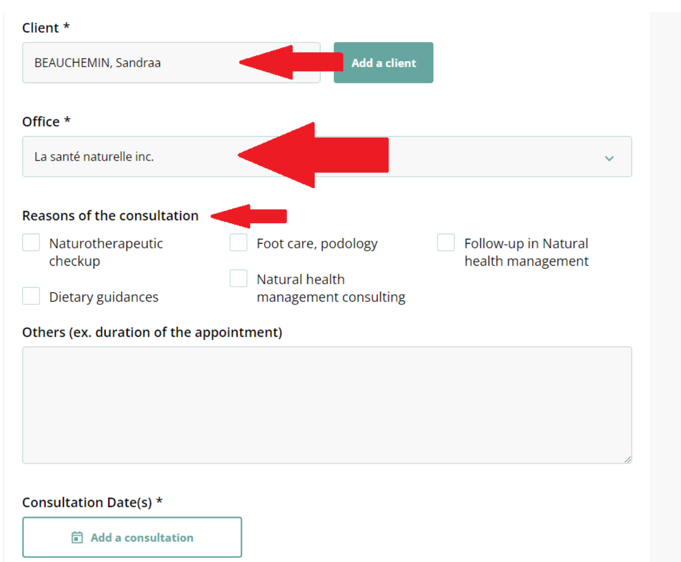
When you enter a client into your system for the first time, you must select ***add a client***.



You will then be able to select this ***client***.

Select the ***office*** you wish to use.

Check the ***reason(s) for the consultation***.



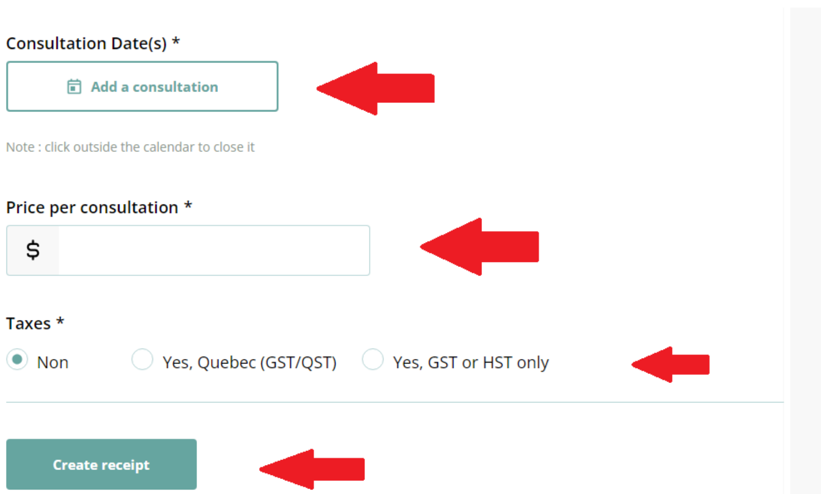
** The contact details of your practice office(s) can be updated in the My information section of the main menu of member's access.*

Now add a consultation date by clicking on the ***calendar symbol***. You can add more than one appointment date.

Enter your ***price per consultation***.

Indicate if taxes are to be applied.

Click on ***create receipt***.



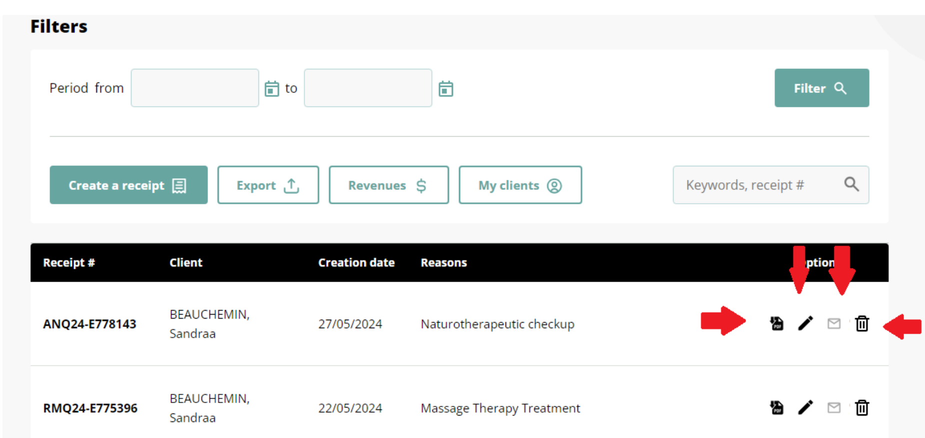
Your receipt is now created!

You can edit it by clicking on ***the pencil symbol***.

You can view and download it by clicking on ***the PDF symbol.***

By clicking on ***the letter symbol***, your receipt will be sent directly to your customer's e-mail address.

You can delete the receipt by clicking on ***the trash symbol***.



TIP!

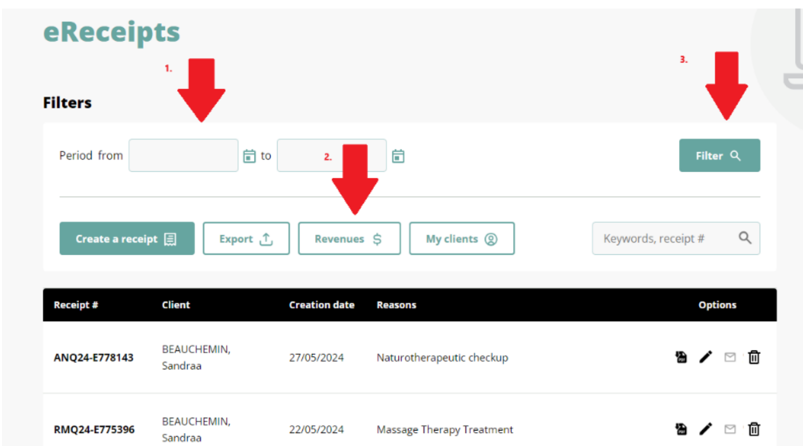
If you already have a client bank, you can add them now by clicking on the ***clients'*** tab in the main menu of ***member's access***.
This will allow you to create your receipts more quickly when needed.

Extract information from your receipt bank

Several options are available to facilitate the management of your activities.

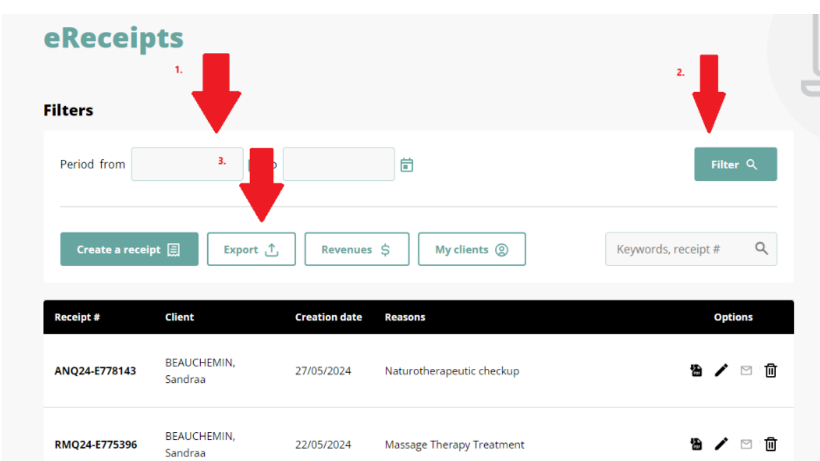
Obtain your revenues

You can obtain this data by selecting a ***period***, then clicking on ***filter***, finally clicking on ***revenues***.



Obtain a copy of your receipts

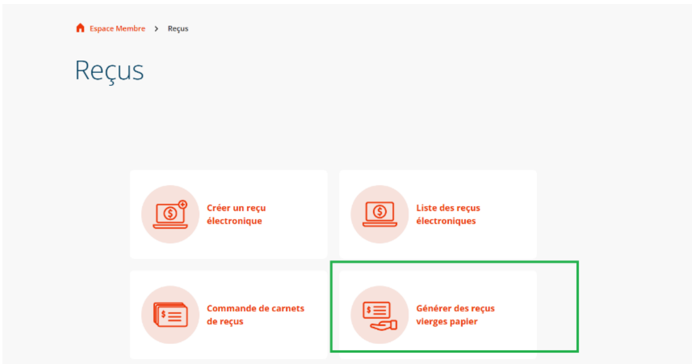
You can obtain your receipts by selecting a ***period***, then clicking on ***filter***, finally clicking on ***export***.



Print blank receipts

To get started, go to your member area, in the Receipts section.

Select ***Generate blank paper receipts***.

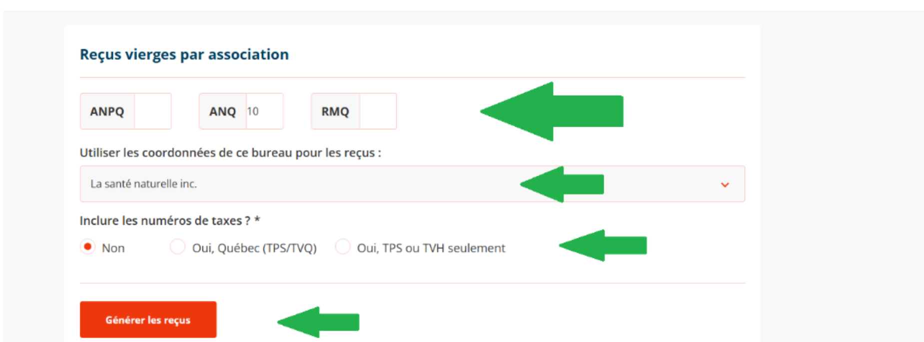


Enter the ***number of receipts*** required.

Select the ***desired office*** (contact details will appear on the receipt).

Indicate whether you wish to ***include taxes***.

Click on ***generate receipts***.



Your series of receipts will appear below, and by ***clicking on the PDF symbol***, you can print them out.