



Get the most out of



Transactions User Guide

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Transactions

This will show a list of all patients, sales balances, payments and the amount to of transactions made between each patient.

Miss Sami Heath

Find a Patient

Find a Transaction

Non-Patient Sale

Cashup

PATIENT	DATE TIME	SALES	PAYMENTS	TRANSACTIONS
Mx Finley Morgan - #55353	02/04/2024 - 09:28:14	£0.00	£0.00	1
Mr Jo Bloggs - #9847603	27/03/2024 - 16:01:36	£15.00	£15.00	2
Mrs Jenny Smith - #9847599	27/03/2024 - 13:37:14	£319.32	£319.32	2
Mx Maisie Knight - #3621610	27/03/2024 - 13:35:45	£0.00	£0.00	1
Ms Polly Kettle - #9847598	24/03/2024 - 13:45:03	£495.90	£330.60	2
Mrs Linden Delves - #9847594	24/03/2024 - 13:24:31	£239.94	£159.96	2
Non-Patient Sale	23/03/2024 - 20:03:35	£60.00	£60.00	6

Click on the patient's name and the list of transactions for that person.

- 01/11/2002 NHS

Miss Sami Heath

Transaction Summary for Miss Sami Heath

Patient Account: £106.98
Patient Total Spend: £121.98
Family: None
Corporate: None / Loyalty: None

Qty

+ Transaction

CL Collection

Take Payment

Patient Account

£0.00

All Transactions

Active Transactions

04/04/2024 £121.98 £0.00

04/04/2024 - Total: £121.98 Balance: £0.00

Standard #41 - 13:44

Items Payments Other Actions

DESCRIPTION	DATE TIME	PRICE	DISCOUNT	TOTAL
Spec Cord *	04/04/2024 - 13:44	£15.00	£0.00	£15.00
Card *	04/04/2024 - 13:44			£15.00

Patient Account #40 - 13:41 Locked

DESCRIPTION	DATE TIME	PRICE	DISCOUNT	TOTAL
Patient Account Top-Up	04/04/2024 - 13:41	£106.98	£0.00	£106.98
Card	04/04/2024 - 13:41			£106.98

Hide

The top right side of the screen has buttons to add further transactions, CL Collections, Take Payments, and Patient Account.

Qty

+ Transaction

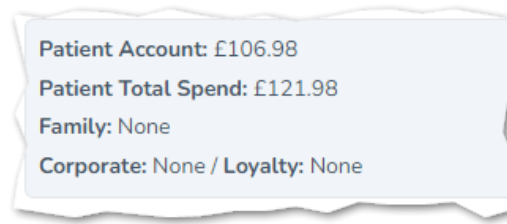
CL Collection

Take Payment

Patient Account

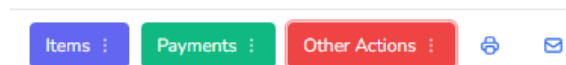
To the left a breakdown of the patient balance on account, Patient Total Spend, Family Amount and details of any corporate or loyalty plan totals.

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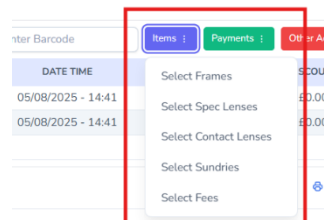


A list of all transactions will be itemised down the left under the “**All Transactions**” heading. To see the content of the receipt click on it and the details will be on the right. “**Active Transactions**”.

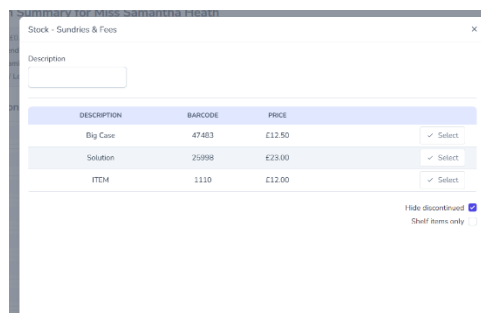
The three buttons have additional options within them. “**Items**”, “**Payments**” and “**Other Actions**”



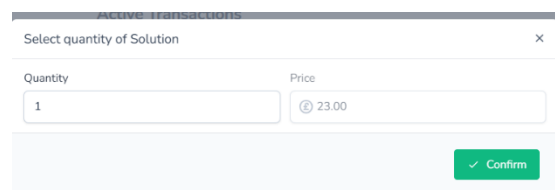
- Items – If the receipt has an outstanding balance, items can be added to it.
- Click on the **Items** button:-



- Select the category the item you want to see is in.
- For example this might be a sundry

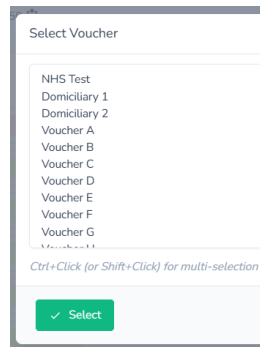


- **Select** the item, this will add it to the receipt.
- If the item you are selling is being sold in multiples, then before selecting as above. Click on the **QTY** button on the top right of the screen, select the item and Nova will ask you how many of this item are you selling.

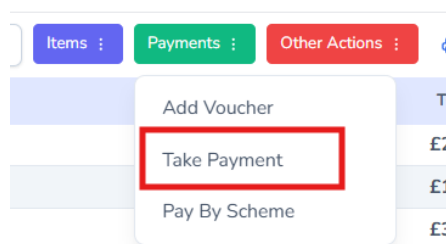


- Payments – Add Voucher or take payment
- If adding a voucher, click on **Payment > Add voucher**

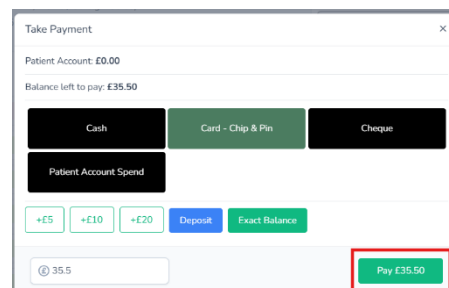
- The lists of vouchers come up, simply select the appropriate one by clicking on the voucher and then the green select button.



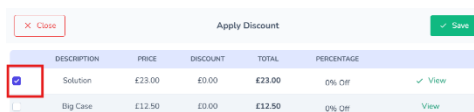
- To take a **Payment** click on the same button and select **Payment**



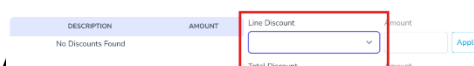
- Click on the payment method (These can be customised)
- And then the amount being paid, this can be the exact balance, a preset deposit or any other amount.
- Click on the Green **Pay** Button



- Other Actions – **Apply Discount, Credit/Refund, Void, Create Order** (when in the dispense screen)
 - Discount – Click on Apply Discount, the list of items will then be displayed.
 - These can either be discounted as a whole or individual lines (i.e one item only)
 - Line Discount – Select the item you want to discount by putting a tick in the box adjacent to the item and then in the **Line discount** box select how you want to discount this item. I.e Percentage or monetary amount



- In this example the percentage – Click . . . pounds rather than a



○

- When done this will show the amount of discount in three places as highlighted above.
- If the discount needs to be cancelled (Voided) for any reason, click on the red circle with the “Trash Can” on it.
- Click Save on the top right.
- The discount now show on the transaction page again the item chosen.

Active Transactions

05/08/2025 - Total: £30.50 Balance: £30.50

Standard #336 - 14:41

DESCRIPTION	DATE TIME	PRICE	DISCOUNT	TOTAL
Solution *	05/08/2025 - 14:41	£23.00	£5.00	£18.00
Big Case *	05/08/2025 - 14:41	£12.50	£0.00	£12.50
Item Total				£30.50

- To discount the whole receipt – This has to be done as a percentage, so again go into **Other Actions** select **Apply discount** and then select **Total Discount**
- Click apply – Again this will show to the left of the screen and the option to delete will be there as before. Click the green Save button

- The percentage will be split across the items in the receipt.

05/08/2025 - Total: £33.73 Balance: £33.73

Standard #336 - 14:41

DESCRIPTION	DATE TIME	PRICE	DISCOUNT	TOTAL
Solution *	05/08/2025 - 14:41	£23.00	£1.15	£21.85
Big Case *	05/08/2025 - 14:41	£12.50	£0.62	£11.88
Item Total				£33.73

- Print Receipt and Email Receipt are to the left.

Credit Refund

- When applying a credit/Refund, from the same **Other Actions Button** click on **Credit/Refund**
- The items which have been paid for will appear on the screen

- **To credit all** – Click on the percentage next to the **Credit All Button**
- Usually this would be 100%
- Then Click on **Credit All** the blue button.
- The items will automatically have the **Restock** slide bar selected. This will put this item back into stock for you.
- Click on the **Reason** field (Why are you giving refund) and make any notes in the **Notes** field
- This credit/refund will be applied as below.

Active Transactions

05/08/2025 - Total: £0.00 Balance: £0.00

Standard #336 - 14:41

DESCRIPTION	DATE TIME	PRICE	DISCOUNT	TOTAL
Solution *	05/08/2025 - 14:41	£23.00	£23.00	£0.00
Big Case *	05/08/2025 - 14:41	£12.50	£12.50	£0.00
Item Total				£0.00
Cash *	05/08/2025 - 15:28			£33.73
Refund - Cash *	05/08/2025 - 15:32			£-33.73
Payment total				£0.00

Void

- Click on **Other Actions**
- Click on **Void**
- This will give the option to void appropriate items as below. Click on the red circle with the trash can to void it.

Void

ITEMS	PRICE	PAYMENTS	AMOUNT
Solution	23.00	Cash	33.73
Discount (%) (Solution)	-1.15	Refund - Cash	-33.73
Credit (Solution)	-21.85		
Big Case	12.50		
Discount (%) (Big Case)	-0.62		
Credit (Big Case)	-11.88		

Item Total : £35.50 Payments Total : £33.73 Balance : £0.00
 Credit / Discount Total : £35.50 Refund Total : £33.73

Find Patient

To search for other transitions within Nova from the blue menu bar > **Transactions**, click on the **"Find Patient"** button along the top. Search using the usual search criteria for the patient. If there is more than one branch. Select from the drop down, the relevant one.

Up to the last six patients which have been actively opened will have their names listed here. This is to facilitate quick searches.

Find Patient Transaction

#	PX	DATE	TYPE	BALANCE	BRANCH
41	Miss Sami Heath	04/04/2024	Standard	£0.00	Worcester ✓
40	Miss Sami Heath	04/04/2024	Patient Account	£0.00	Worcester ✓
38	Mx Finley Morgan	02/04/2024	Standard	£0.00	Worcester ✓
37	Non Patient Sale	28/03/2024	Standard	£0.00	Worcester ✓
36	Mr Jo Bloggs	27/03/2024	Standard	£0.00	Worcester ✓
35	Mr Jo Bloggs	27/03/2024	Standard	£0.00	Worcester ✓
34	Mrs Jenny Smith	27/03/2024	Dispense	£0.00	Worcester ✓

A transaction number can be searched on and also a date range to find a specific receipt if required.

Non-Patient Sale

Items can be sold through this option to those who are not are not patients.

Click on the appropriate button and depending on the function of the button select the item from the drop-down menu. The receipt will be created, and payment can then be taken via the Take Payment button.

The screenshot displays the 'Till Transaction (Non Patient Sale)' interface. At the top, it shows transaction details: Transaction #: 42, Branch: Worcester, Type: Standard, Created: 04/04/2024 - 14:37, Staff: Miss Sami Heath, and P#: Non Patient Sale. A 'Select a Transaction' button is in the top right. Below the details is a grid of buttons: 'Select Frames', 'Select Spec Lenses', 'Select Contact Lenses', 'Select Sundries', 'Select Fees', 'Scan Barcode', 'Add Voucher', 'Take Payment', 'Apply Discount', 'Credit / Refund', 'Void', and 'Create Order'. To the right of the buttons is a summary section with a total of £0.00. Below this are two tables: one for items and one for payments, both showing 'No Items Found' and 'No Payments Found' respectively.

DESCRIPTION	DATE TIME	PRICE
No Items Found		£0.00

PAYMENT METHOD	DATE TIME	AMOUNT
No Payments Found		£0.00

N.B Petty Cash and Cash-up are included in another manual.