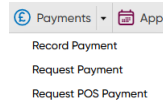


Point of Sale - Invoice payment

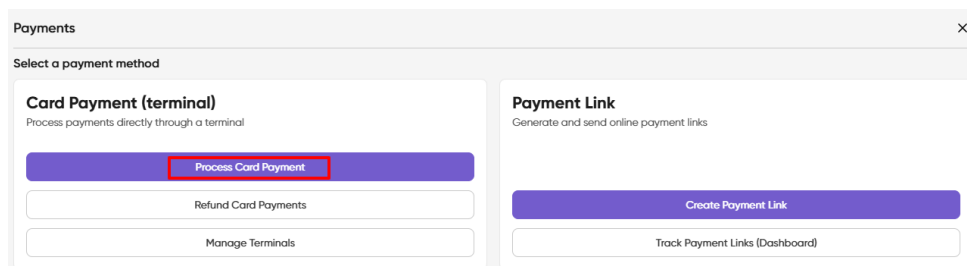
18/12/2025 10:01 am GMT

Taking a Point of Sale Payment via the Payment's Menu

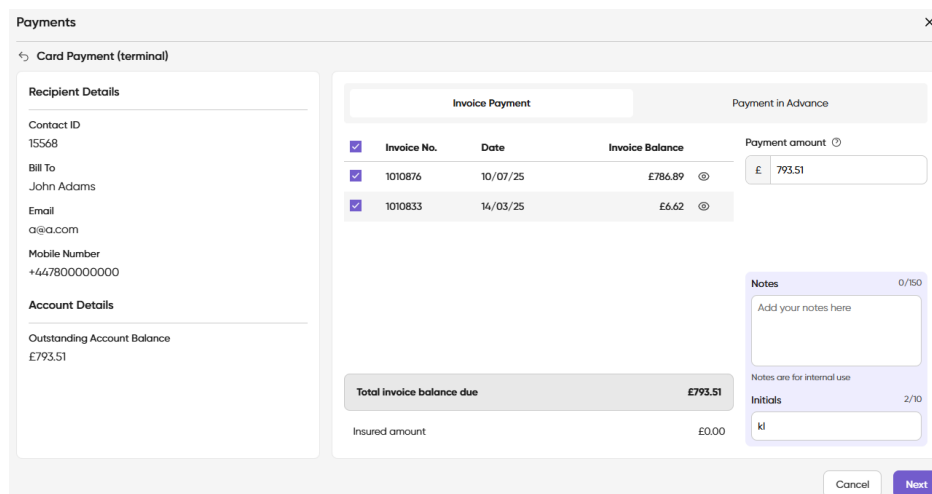
1. Once in a Merlin client record, click on the dropdown arrow at the side of the payments button.



2. Select Request POS Payment. You are presented with the Payments box, select Process Card Payment

A screenshot of the 'Payments' dialog box. It has a title bar 'Payments' with a close button. Below the title bar is a section 'Select a payment method'. There are two main panels. The left panel is titled 'Card Payment (terminal)' with the subtitle 'Process payments directly through a terminal'. It contains three buttons: 'Process Card Payment' (highlighted with a red box), 'Refund Card Payments', and 'Manage Terminals'. The right panel is titled 'Payment Link' with the subtitle 'Generate and send online payment links'. It contains two buttons: 'Create Payment Link' and 'Track Payment Links (Dashboard)'.

3. At this stage you can select to either process a card payment against a selected invoice or click the other tab to process a payment in advance. [Point of Sale Advance Payment](#)
4. The client details will pre-populate the form. Check that you have the correct details for the client by checking the details displayed in 'Contact ID' and 'Bill to'.

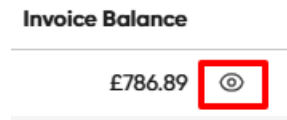
A screenshot of the 'Payments' dialog box, specifically the 'Card Payment (terminal)' section. The left sidebar contains 'Recipient Details' (Contact ID: 15568, Bill To: John Adams, Email: a@a.com, Mobile Number: +447800000000) and 'Account Details' (Outstanding Account Balance: £793.51). The main area has two tabs: 'Invoice Payment' (selected) and 'Payment in Advance'. Under 'Invoice Payment', there is a table with columns: Invoice No., Date, Invoice Balance, and Payment amount. The table has three rows, all with the 'Invoice No.' checkbox selected. The first row shows Invoice No. 1010876, Date 10/07/25, Invoice Balance £786.89, and Payment amount £793.51. The second row shows Invoice No. 1010833, Date 14/03/25, Invoice Balance £6.62, and Payment amount £793.51. Below the table, there is a summary section: 'Total Invoice balance due' £793.51, 'Insured amount' £0.00, and a 'Notes' section with a text area and 'Initials' field. At the bottom right are 'Cancel' and 'Next' buttons.

5. By default all outstanding invoices will be selected.
6. Select the invoices you would like to request payment against, using the tick boxes. The default view will be that all invoices will automatically be selected. If you record insurance against line items in Merlin, these will automatically be calculated, so you can quickly understand which items are covered by insurance and will show at the bottom of the screen as Insured amount.
 - Total invoice balance due will display the total balance of the invoices selected
 - Insured and uninsured - please note that these calculations do not consider any payments that have already been made against invoices. They are presented to give guidance on items that are covered by insurance whilst taking a payment
 - Uninsured amount – Total of any invoice line items that are not recorded as covered by insurance automatically calculated at an invoice level

- Insured amount - Total of any invoice line items that are recorded as covered by insurance in Merlin, automatically calculated at an invoice level

NB The Payment amount can be amended if required.

7. If you need to check the invoice details then you can select the 'eye' at the side of the Invoice Balance.



8. Add any internal notes, input your initials and select Create Link

A screenshot of a payment form. At the top, there is a field labeled 'Payment amount' with a value of '£ 100.00'. Below this is a 'Notes' section with a text area containing 'Part payment'. Under the notes is a section for 'Initials' with the value 'kl'. At the bottom right, there are two buttons: 'Cancel' and 'Next'. Red boxes highlight the 'Payment amount', 'Notes', 'Initials', and 'Next' buttons.

9. You are now presented with a Payments box - Card Payment (terminal)

A screenshot of the 'Payments' box. The title is 'Payments'. Below it is a tab labeled 'Card Payment (terminal)'. The box is divided into two main sections: '1 Summary' and '2 Terminal Session'. The 'Summary' section shows 'Payment Amount £100.00', 'Customer John Adams', and 'Invoices #1010876'. There is a toggle switch for 'Customer is present' which is currently turned on. Below this is a dropdown menu for 'Card Terminal' showing 'VCMWIASIPO'. At the bottom of the summary section is a button labeled 'Request Payment: £100.00'. The 'Terminal Session' section is currently empty and shows a message 'Terminal session not started'.

10. By default the assumption is the customer is present, if the cardholder is not present please click the slider button which will set the terminal into "cardholder not present" mode:




11. If you have more than one terminal ensure you select the correct one from the dropdown options.

NB Terminals connected via the integration are displayed by their Terminal IDs in the Merlin payments window. For setups with multiple terminals, you can select your preferred terminal. To simplify this process, we've introduced the ability to name terminals, making it easier to identify and choose the desired terminal.

Card Terminal

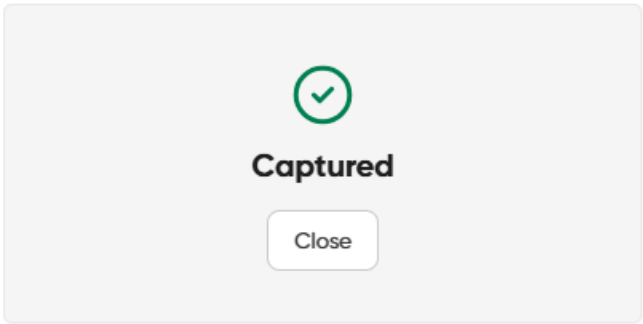
VCMMWIASIPO



12. Now select Request Payment to send the payment amount automatically to the terminal:


Request Payment: £100.00

13. The terminal screen will display and indicate to you the stages of payment processing. Once the payment is completed you will see the following notification. If it is declined you may have the option to retry or ask your client if they have an alternative payment method. If you require a receipt select Send Confirmation Email.



Email

a@a.com



Send Confirmation Email

14. Once the payment is received the client's Merlin account will be automatically updated as paid and details will be recorded in the Daily Cash Report.

Daily Cash by Booked Date						
Till Takings						
From Booked Date		To Booked Date		Payment Method	Client Category	Work (Payment) Site:
07/11/2025 00:00		07/11/2025 15:24		All	All	Esher SA
Register Last Date		Start From Last Run		Cash book history		Account Type All
Booked Date	Client	Address	Cash	Cheque	Debit Card	Credit Card
07/11/2025 15:21	Adams, John	10 Main Road	0.00	0.00	0.00	100.00