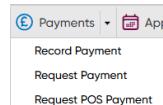


Point of Sale - Advance payment

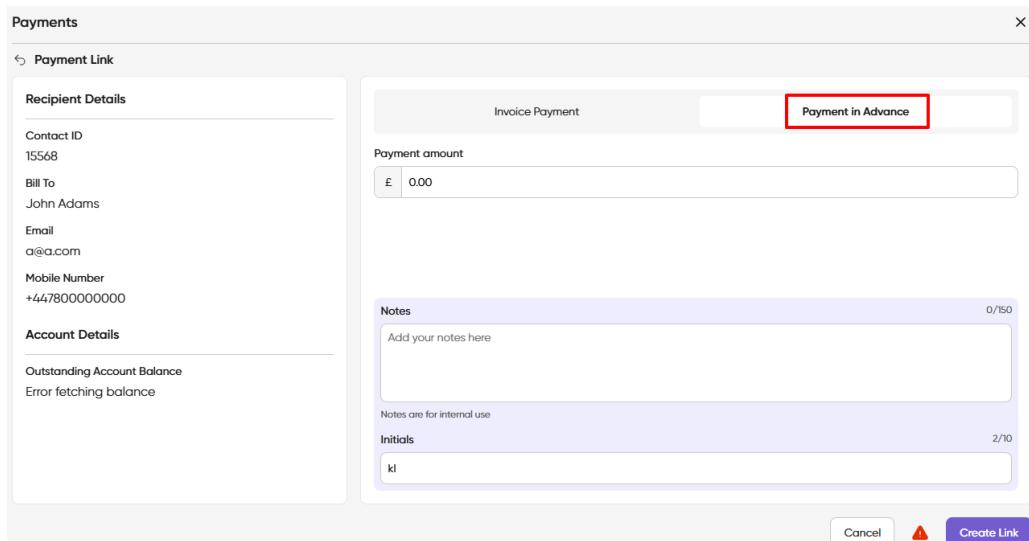
14/01/2026 2:55 pm GMT

Taking an Advance Payment via the Point of Sale Payments Menu

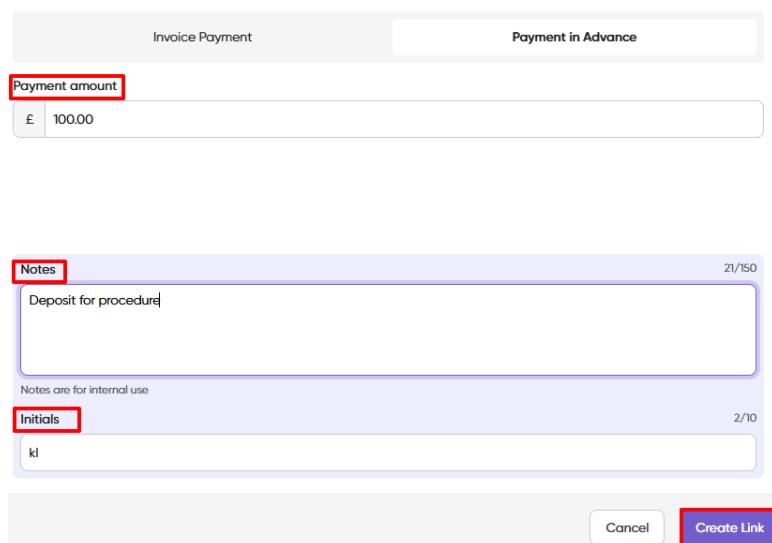
- Once in a Merlin client record, click on the dropdown arrow at the side of the payments button. A new dropdown menu will appear.



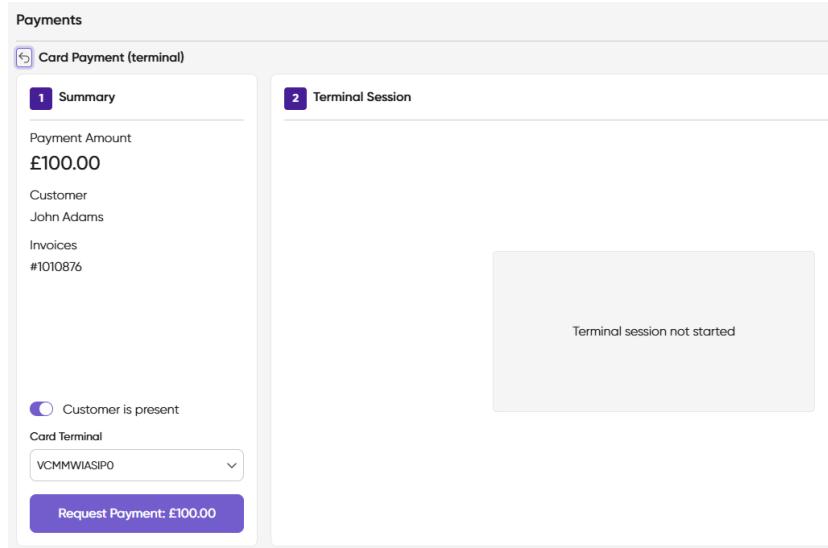
- Select Request POS Payment.
- You are presented with the Payment screen, showing the customer details. Select the Payment in Advance button.



- Enter the required payment amount, any notes and your initials then select Create Link



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



6. 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:

Customer is present

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

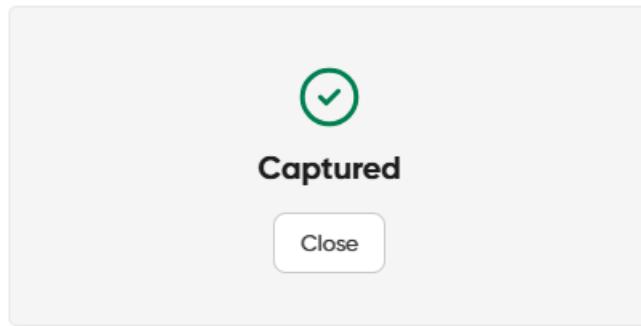


NB Terminals connected via the integration are displayed by their Terminal IDs in the Merlin payments window. For setups with multiple terminals, you can select your preferred terminal. To simplify this process, we've introduced the ability to name terminals, making it easier to identify and choose the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

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

Request Payment: £100.00

9. 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.



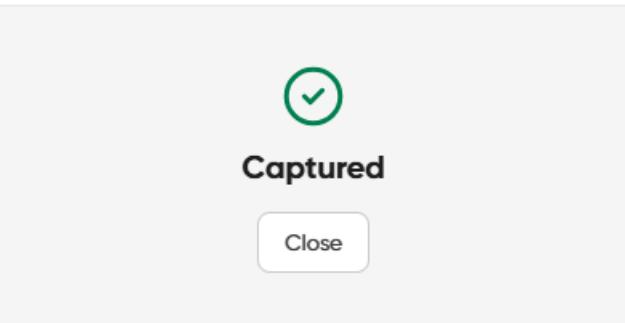
Email

a@a.com ▾

Send Confirmation Email

10. Once the payment is received the customer'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	



Email

a@a.com ▾

Send Confirmation Email

11. Once the payment is received the customer'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			
07/11/2025	00:00	07/11/2025	15:24			
All	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