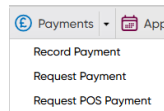


Point of Sale - Advance payment

14/01/2026 2:55 pm GMT

Taking an Advance Payment via the Point of Sale Payments Menu

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



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

A screenshot of the 'Payments' screen. On the left, under 'Payment Link', there are 'Recipient Details' (Contact ID: 15568, Bill To: John Adams, Email: a@a.com, Mobile Number: +447800000000) and 'Account Details' (Outstanding Account Balance, Error fetching balance). On the right, there are two tabs: 'Invoice Payment' and 'Payment in Advance' (highlighted with a red box). Below the tabs is a 'Payment amount' field with a currency selector set to '£' and a value of '0.00'. There is a 'Notes' section with a text area (0/150) and an 'Initials' section with a text field containing 'kl' (2/10). At the bottom right are 'Cancel' and 'Create Link' buttons.

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

Two close-up screenshots of the payment form. The first shows the 'Payment in Advance' tab and the 'Payment amount' field, which now has '£ 100.00' entered (the 'Payment amount' label is highlighted with a red box). The second shows the 'Notes' section with 'Deposit for procedure' entered (the 'Notes' label is highlighted with a red box) and the 'Initials' field with 'kl' (the 'Initials' label is highlighted with a red box). The 'Create Link' button is highlighted with a red box in both screenshots.

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

The screenshot shows a 'Payments' window with a 'Card Payment (terminal)' tab. It is divided into two panels: '1 Summary' and '2 Terminal Session'. The 'Summary' panel displays the payment amount (£100.00), customer name (John Adams), and invoice number (#1010876). It includes a toggle for 'Customer is present' (which is turned on), a dropdown for 'Card Terminal' (set to 'VCMWIASIPO'), and a purple button labeled 'Request Payment: £100.00'. The 'Terminal Session' panel shows a message 'Terminal session not started'.

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.

Card Terminal

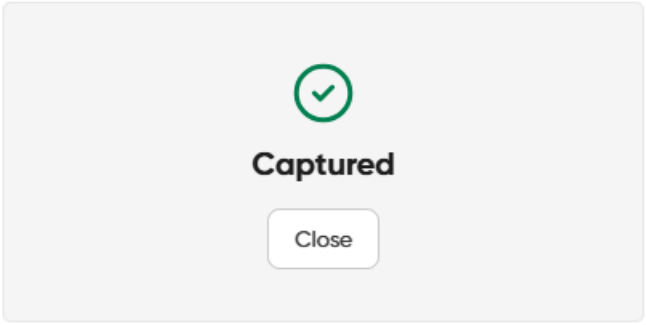
VCMWIASIPO 

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.



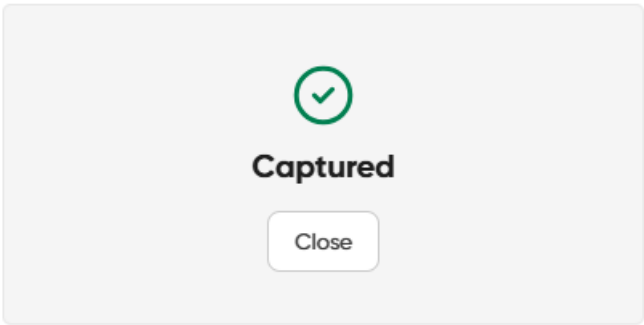
Email

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

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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
