



# POS Transactions in Cliniqua360 Platform

Powered by [guidde](#)



This tutorial guides you through processing a point-of-sale transaction using the Cliniqua360 Clinic Management Platform.

Go to [app.cliniqa360.com](http://app.cliniqa360.com)

## 01 Introduction

You will learn how to apply voucher codes, select patients, schedule pickups, and finalize payments efficiently.

The screenshot displays the Cliniqa360 dashboard interface. On the left is a dark sidebar with a navigation menu. The main content area shows a 'Welcome to Cliniqa360! Let's get you set up.' dialog box with a progress bar at 73% completion. The tasks listed are:

- Verify your Email** (REQUIRED): Ensure you have access to your account and receive important updates. Status: Pending.
- Complete Clinic Profile**: Add your clinic name, address, and specialty to set up your account. Status: Done.
- Upload Clinic Logo**: Personalize your clinic receipts and communications. Status: Pending. Includes an 'Upload Logo' button.
- Add a Branch**: Set up your main clinic branch to start managing appointments and stock. Status: Done.
- Add Your First Patient**: Create a patient record and start tracking medical history. Status: Done.
- Create an Appointment**: Schedule your first patient visit to see the calendar in action. Status: Done.
- Process a Sale**: Use the Point of Sale system to complete your first transaction. Status: Pending.

A 'Copied!' notification in the bottom right corner states: 'Voucher code WELCOME10 copied to clipboard.' with a red 'g' icon.

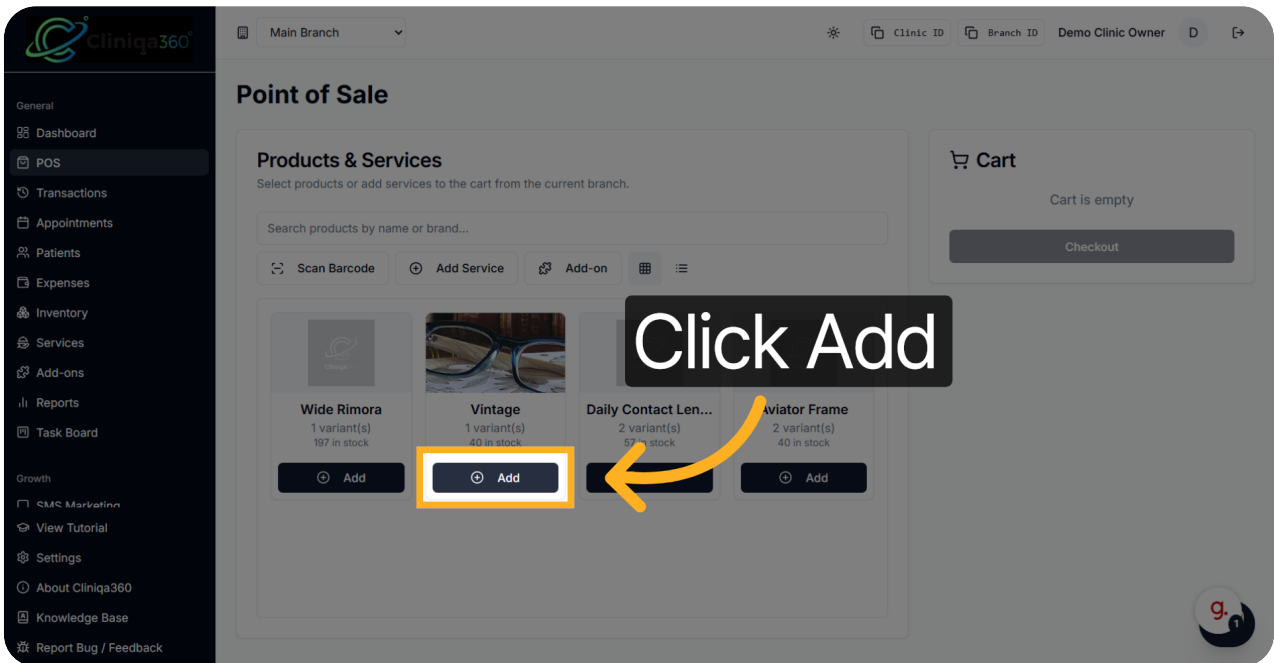
## 02 Access POS Section

Click "POS" to open the point-of-sale section within the Cliniqua360 platform.



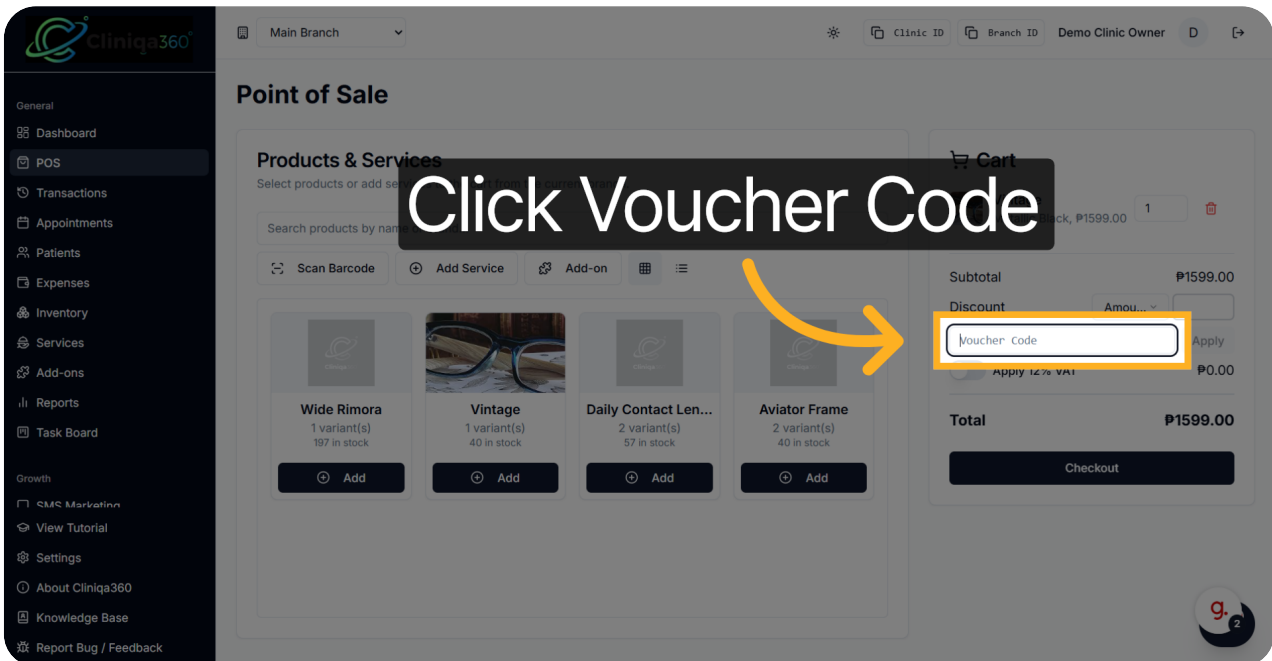
### 03 Initiate New Transaction

Click "Add" to start a new transaction in the POS module.



## 04 Open Voucher Code Field

Click "Voucher Code" to enter a discount or promotional code for the transaction.



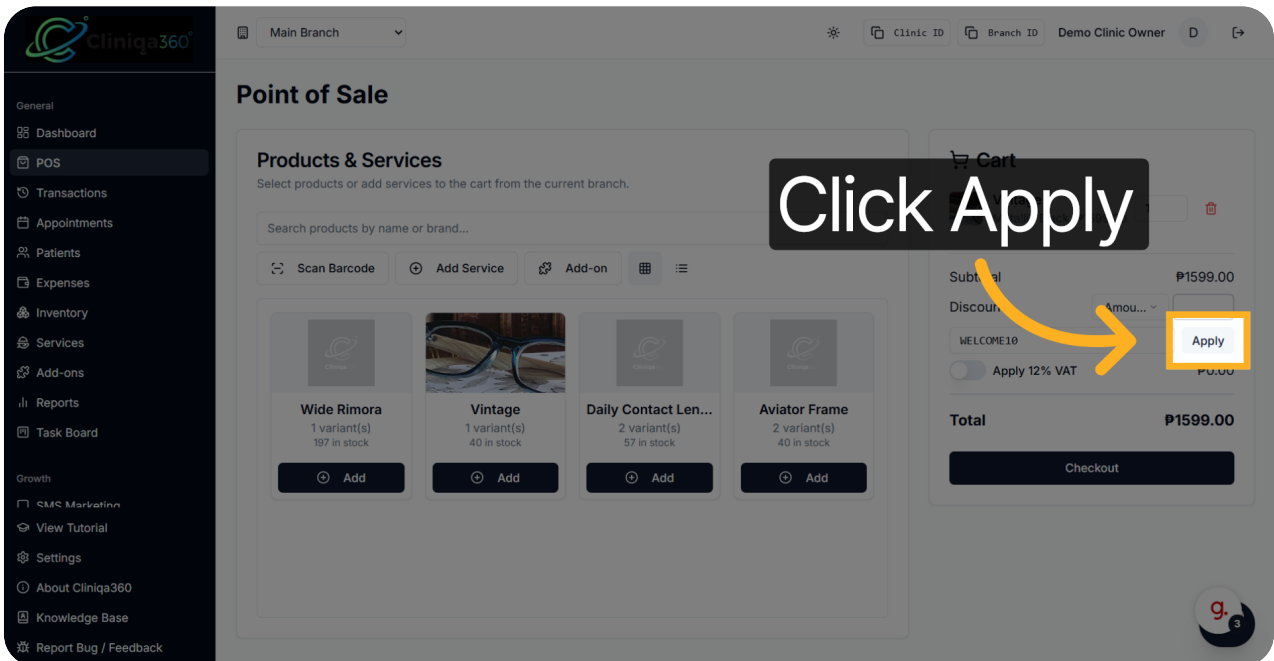
## 05 Enter Voucher Code

Fill "WELCOME10" in the voucher code field to apply the welcome discount.

The screenshot displays the Clinika360 Point of Sale (POS) interface. On the left is a dark sidebar with a navigation menu including: General (Dashboard, POS, Transactions, Appointments, Patients, Expenses, Inventory, Services, Add-ons, Reports, Task Board), Growth (CMS Marketing, View Tutorial, Settings, About Clinika360, Knowledge Base), and Report Bug / Feedback. The main content area is titled "Point of Sale" and shows the "Main Branch" selected. Below this is the "Products & Services" section with a search bar and buttons for "Scan Barcode", "Add Service", "Add-on", and a grid icon. A grid of four product cards is visible: "Wide Rimora" (1 variant, 197 in stock), "Vintage" (1 variant, 40 in stock), "Daily Contact Len..." (2 variants, 57 in stock), and "Aviator Frame" (2 variants, 40 in stock). Each card has an "Add" button. To the right is the "Cart" section, which shows one item: "Vintage Metallic Black, P1599.00" with a quantity of 1. The subtotal is P1599.00. There is a "Discount" section with an "Amount" dropdown and a "Voucher Code" input field with an "Apply" button. Below this is a toggle for "Apply 12% VAT" (currently off) and a "Total" of P1599.00. A "Checkout" button is at the bottom of the cart. The Clinika360 logo is in the bottom right corner.

## 06 Apply Voucher Code

Click "Apply" to validate and apply the voucher code to the current transaction.



## 07 Select Quantity

Click "2" to specify the quantity of the selected item for purchase.

The screenshot displays the Clinika360 Point of Sale interface. On the left is a dark sidebar with navigation options: Dashboard, POS, Transactions, Appointments, Patients, Expenses, Inventory, Services, Add-ons, Reports, Task Board, CMS Marketing, View Tutorial, Settings, About Clinika360, Knowledge Base, and Report Bug / Feedback. The main area is titled "Point of Sale" and "Products & Services". It features a search bar and buttons for "Scan Barcode", "Add Service", and "Add-on". Below are four product cards: "Wide Rimora" (1 variant, 197 in stock), "Vintage" (1 variant, 40 in stock), "Daily Contact Len..." (2 variants, 57 in stock), and "Aviator Frame" (2 variants, 40 in stock). Each card has an "Add" button. On the right, a "Cart" section shows a "Metallic Blue" item with a quantity of 2, highlighted by a yellow box and a callout that says "Increase quantity". Below the cart are summary items: Subtotal (P3198.00), Discount (WELCOME10, -P319.80), Apply 12% VAT (P0.00), and Total (P2878.20). A "Checkout" button is at the bottom right. A notification at the bottom right states "Voucher Applied WELCOME10 applied successfully."

## 08 Specify Item Quantity

Fill "1" to indicate the quantity for the selected item.

The screenshot displays the Clinika360 Point of Sale (POS) interface. On the left is a dark sidebar with navigation options: General (Dashboard, POS, Transactions, Appointments, Patients, Expenses, Inventory, Services, Add-ons, Reports, Task Board), Growth (CMS Marketing, View Tutorial, Settings, About Clinika360, Knowledge Base), and Report Bug / Feedback. The main area is titled "Point of Sale" and shows the "Main Branch" selected. Below this is the "Products & Services" section with a search bar and buttons for "Scan Barcode", "Add Service", "Add-on", and a grid icon. Four product cards are visible: "Wide Rimora" (1 variant, 197 in stock), "Vintage" (1 variant, 40 in stock), "Daily Contact Len..." (2 variants, 57 in stock), and "Aviator Frame" (2 variants, 40 in stock). Each card has an "Add" button. To the right is the "Cart" section, which shows a "Vintage" item (Metallic Black, P1599.00) with a quantity of 1. The cart summary includes: Subtotal (P3198.00), Discount (WELCOME10, -P319.80), Apply 12% VAT (P0.00), and a Total of P2878.20. A "Checkout" button is at the bottom of the cart. A notification at the bottom right states "Voucher Applied WELCOME10 applied successfully." with a "g." logo.

## 09 Confirm Item Selection

Click "1" to confirm the quantity of the selected item.

The screenshot displays the Clinica360 Point of Sale interface. A dark overlay with the text "Select quantity" is positioned at the top right. The main area is divided into "Products & Services" and a "Cart" section. The "Products & Services" section features a search bar and four product cards: "Wide Rimora" (1 variant, 197 in stock), "Vintage" (1 variant, 40 in stock), "Daily Contact Len..." (2 variants, 57 in stock), and "Aviator Frame" (2 variants, 40 in stock). Each card has an "Add" button. The "Cart" section on the right shows a list of items, with the quantity "1" highlighted in a yellow box and pointed to by a yellow arrow. Below the cart items, the subtotal is P1599.00, a discount of P159.90 is applied, and the total is P1439.10. A "Checkout" button is visible at the bottom of the cart section. A notification at the bottom right states "Voucher Applied WELCOME10 applied successfully."

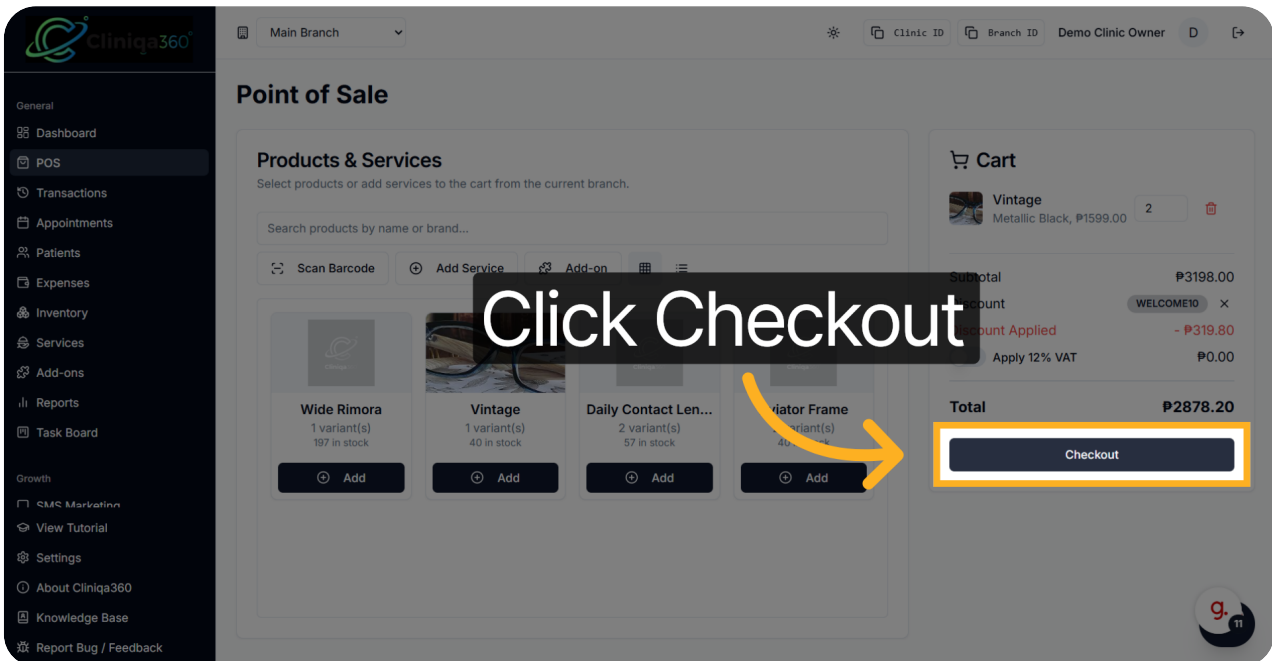
## 10 Enter Additional Quantity

Fill "2" to specify the quantity for the additional item.

The screenshot displays the Clinika360 Point of Sale (POS) interface. On the left is a dark sidebar with navigation options: General (Dashboard, POS, Transactions, Appointments, Patients, Expenses, Inventory, Services, Add-ons, Reports, Task Board), Growth (CMS Marketing, View Tutorial, Settings, About Clinika360, Knowledge Base, Report Bug / Feedback), and a user profile for Demo Clinic Owner. The main area is titled "Point of Sale" and includes a "Main Branch" dropdown. Below this is the "Products & Services" section with a search bar and buttons for "Scan Barcode", "Add Service", "Add-on", and a grid icon. Four product cards are shown: "Wide Rimora" (1 variant, 197 in stock), "Vintage" (1 variant, 40 in stock), "Daily Contact Len..." (2 variants, 57 in stock), and "Aviator Frame" (2 variants, 40 in stock). Each card has an "Add" button. To the right is the "Cart" section, which contains one item: "Vintage Metallic Black, P1599.00". The cart summary shows a subtotal of P3198.00, a "WELCOME10" discount of -P319.80, and a total of P2878.20. A "Checkout" button is at the bottom of the cart. A small "g." logo is in the bottom right corner.

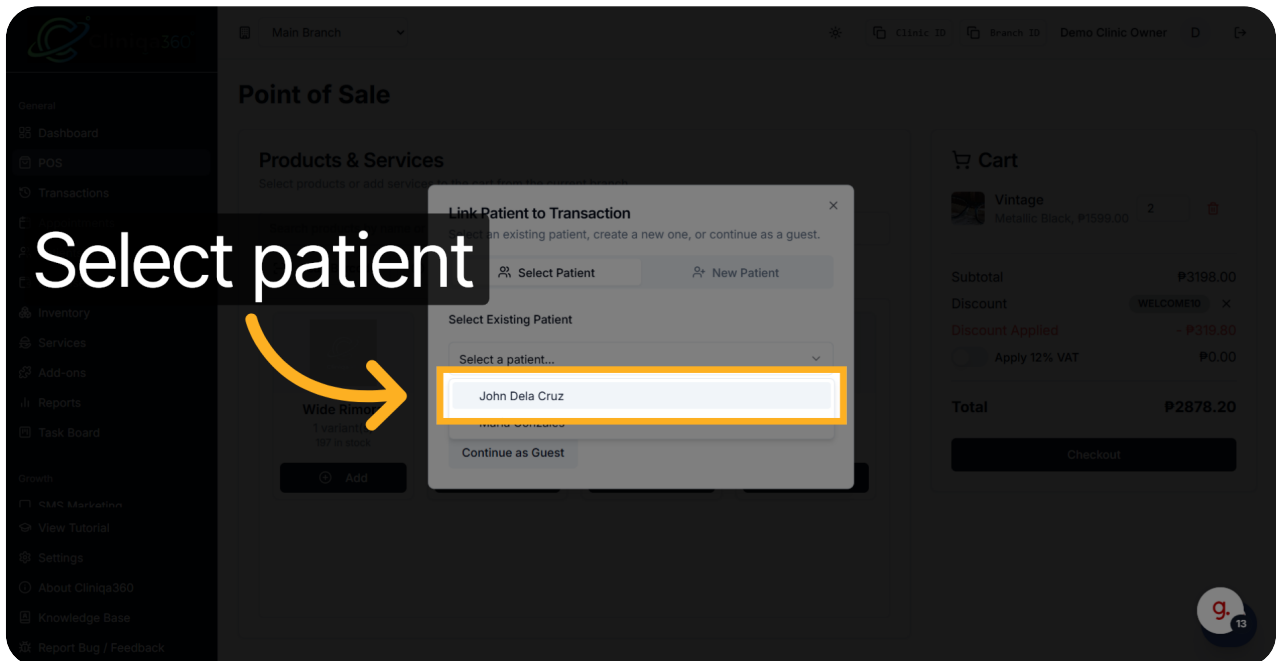
## 11 Proceed to Checkout

Click "Checkout" to review the transaction details and proceed to payment.



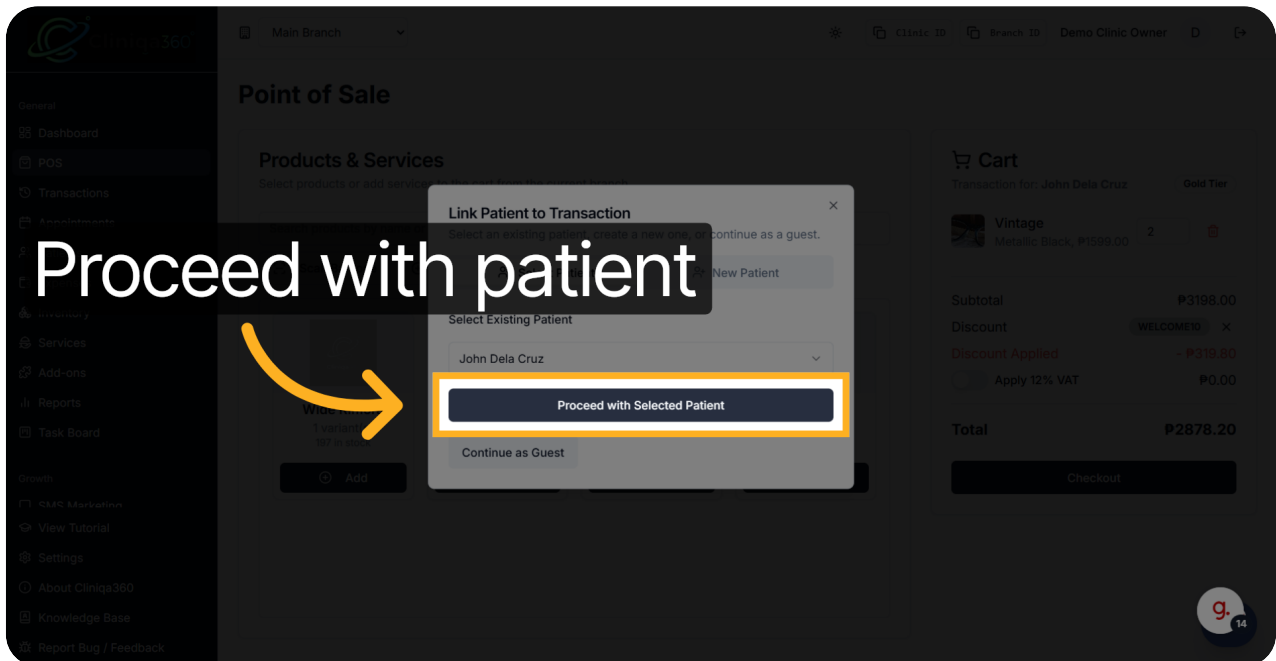
## 12 Choose Patient

Click the patient associated with this transaction.



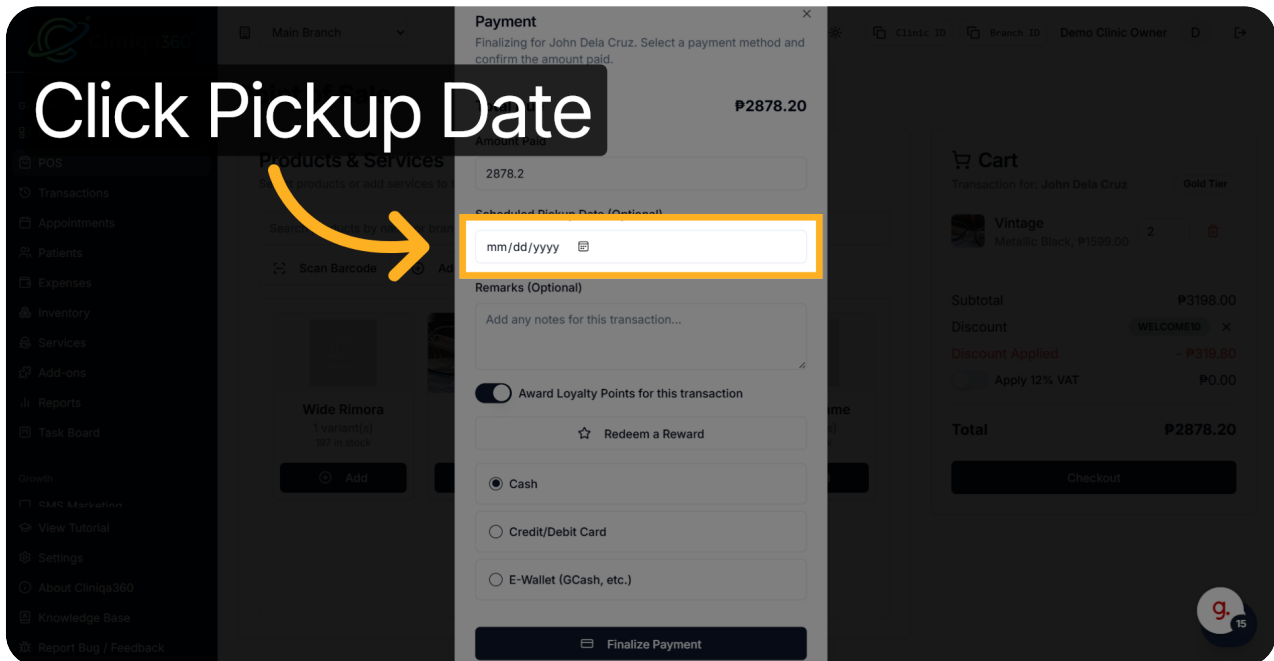
## 13 Confirm Patient Selection

Click "Proceed with Selected Patient" to continue with the chosen patient.



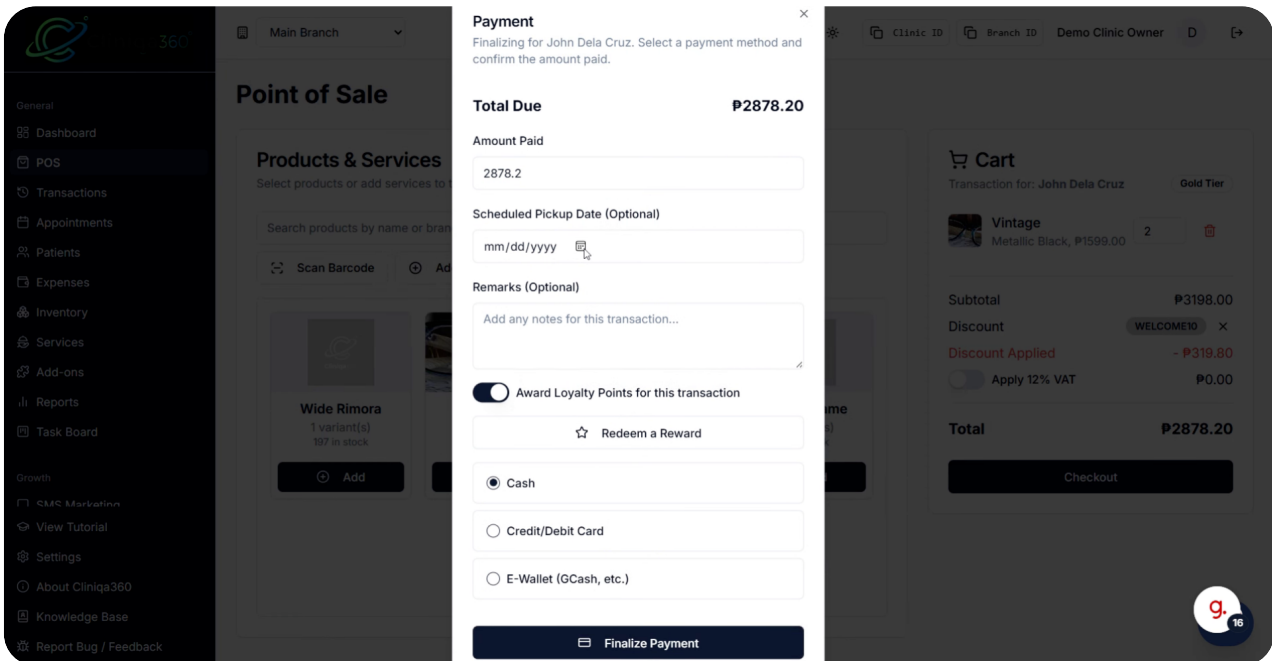
## 14 Open Pickup Date Field

Click "Scheduled Pickup Date" to set a preferred date for item pickup. This is optional.



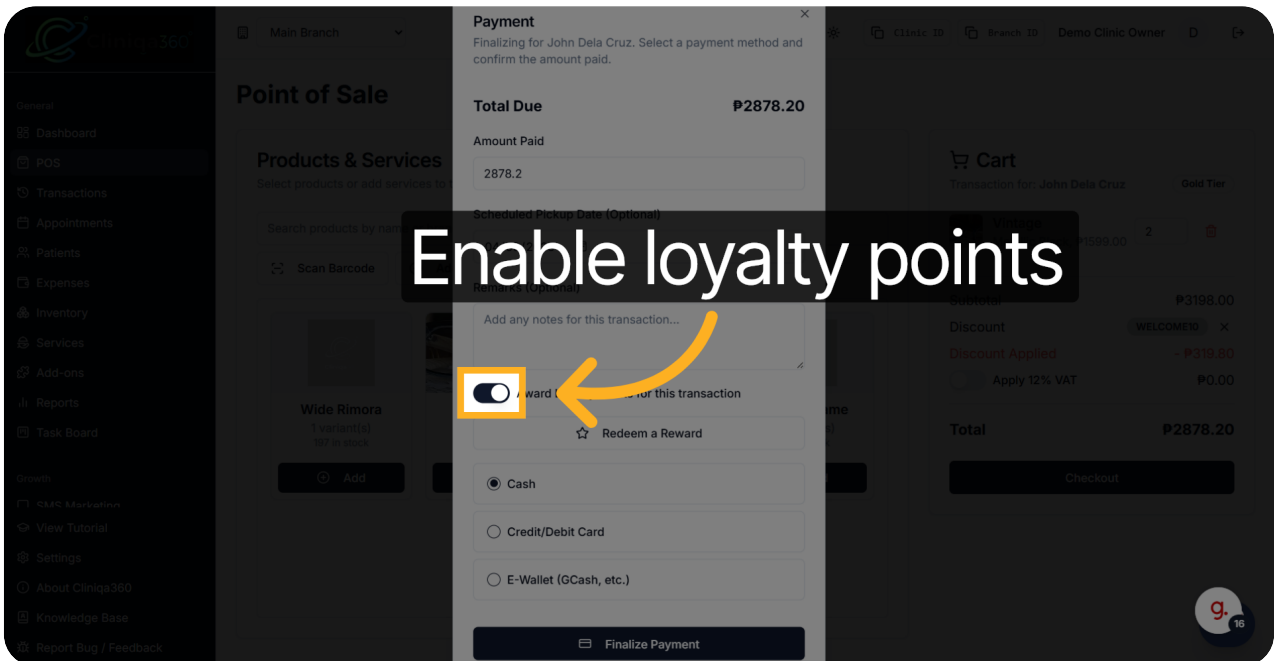
## 15 Set Pickup Date

Fill the date to schedule the pickup date for the transaction.



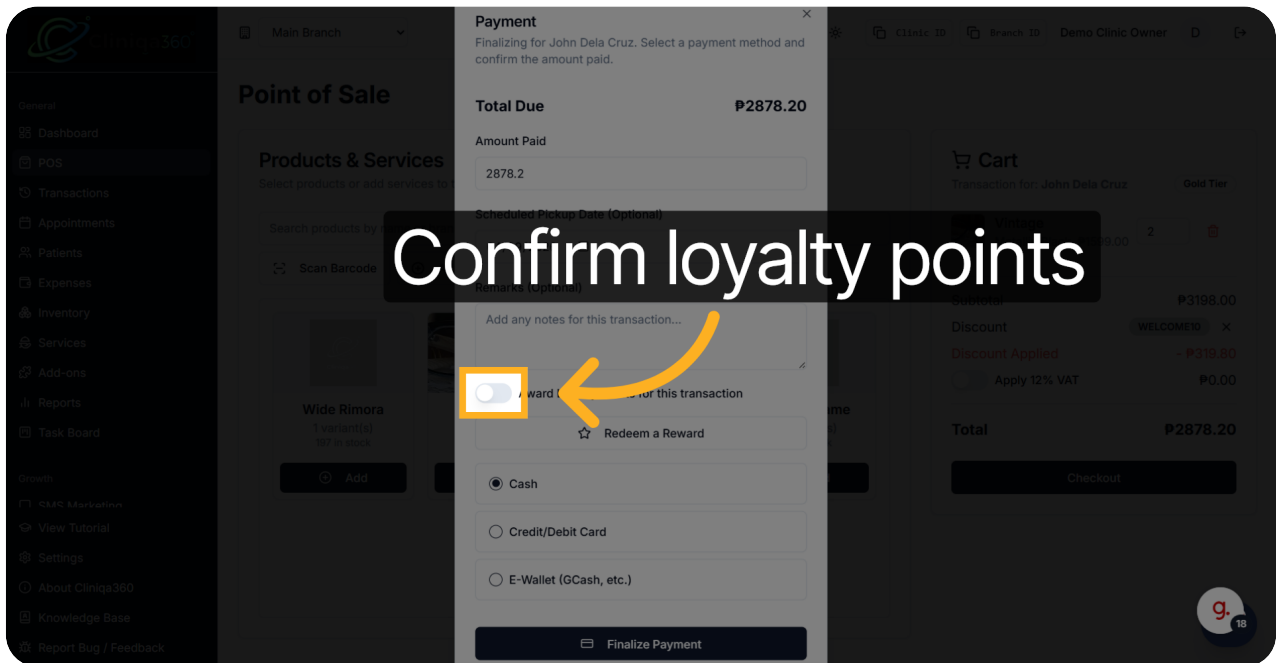
## 16 Enable Loyalty Points

Toggle on the "Award Loyalty Points for this transaction" to grant points to the patient.



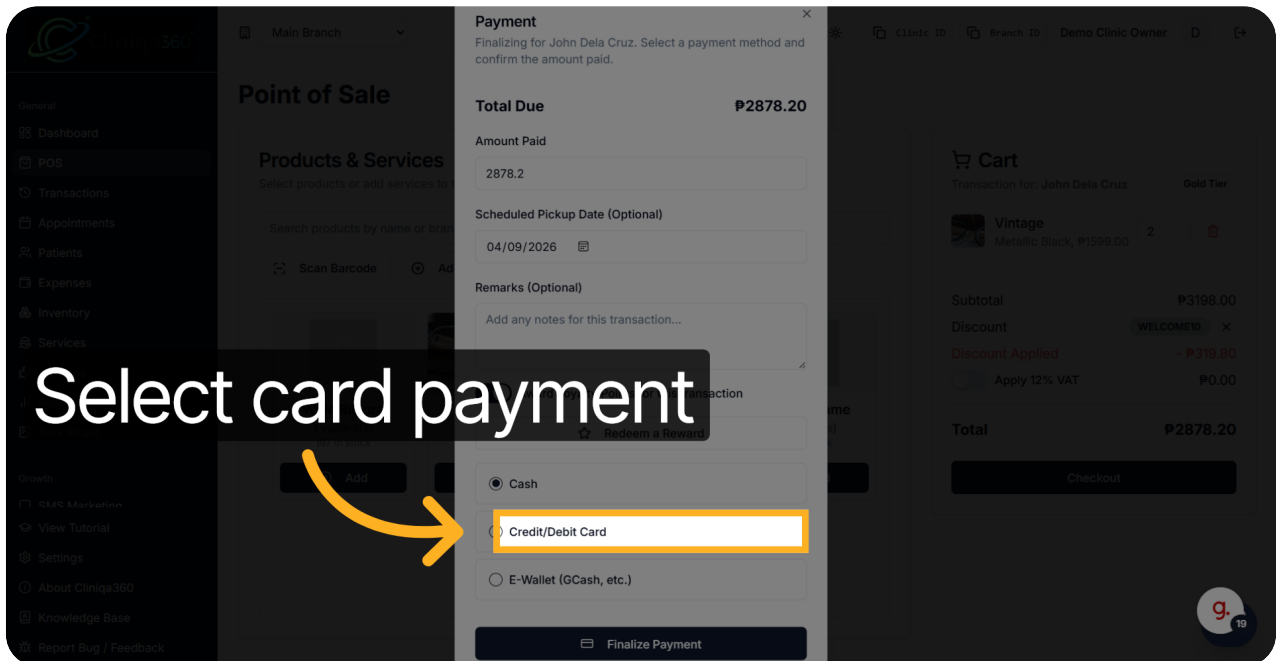
## 17 Confirm Loyalty Points

Toggle off "Award Loyalty Points for this transaction" again if you don't want to grant points to the patient



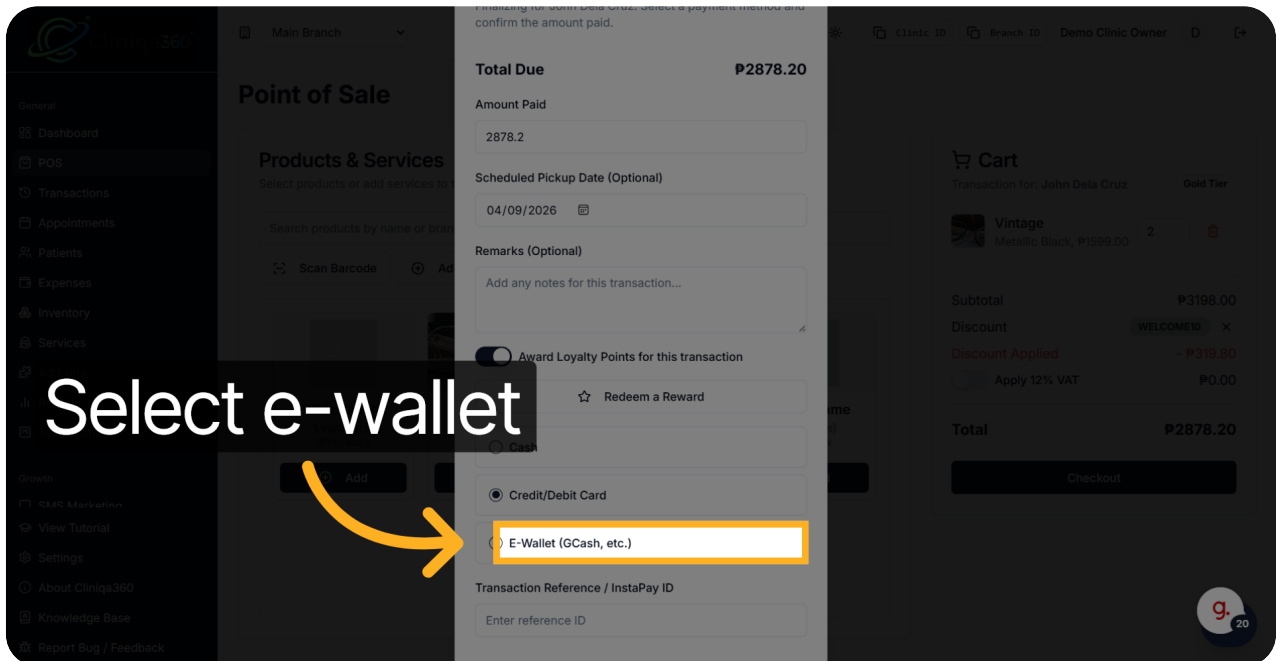
## 18 Select Card Payment

Click "Credit/Debit Card" to choose card payment as the payment method.



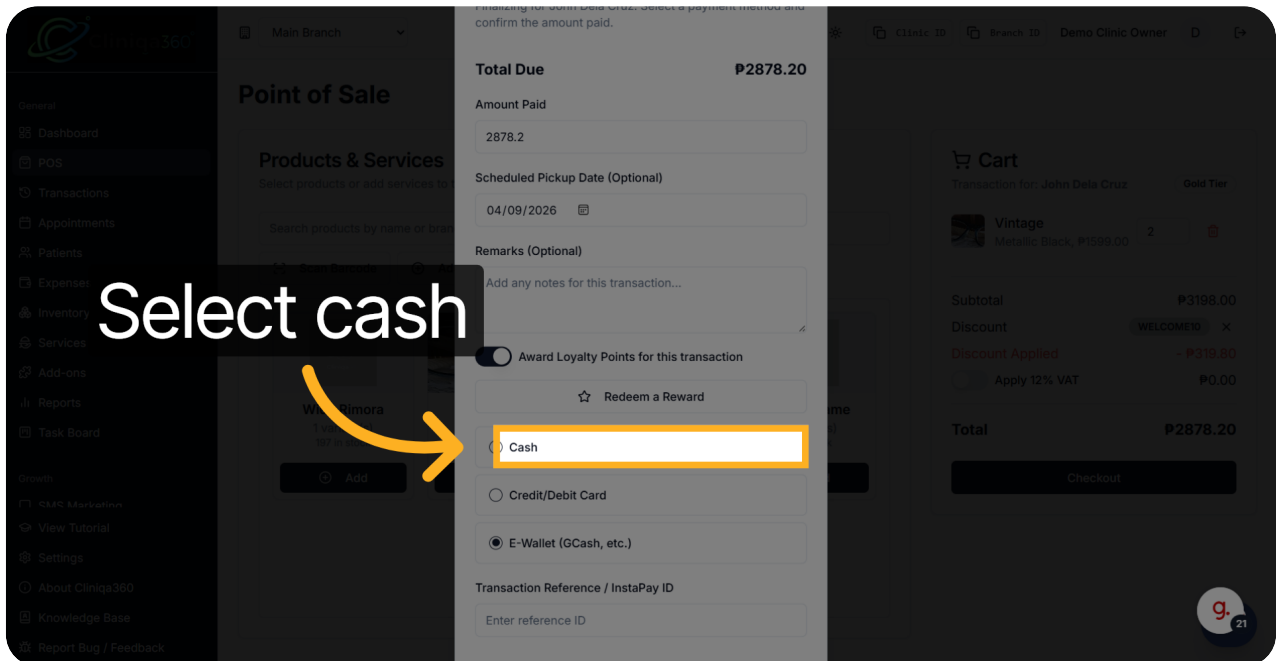
## 19 Select E-Wallet Payment

Click "E-Wallet (GCash, etc.)" to choose electronic wallet payment options.



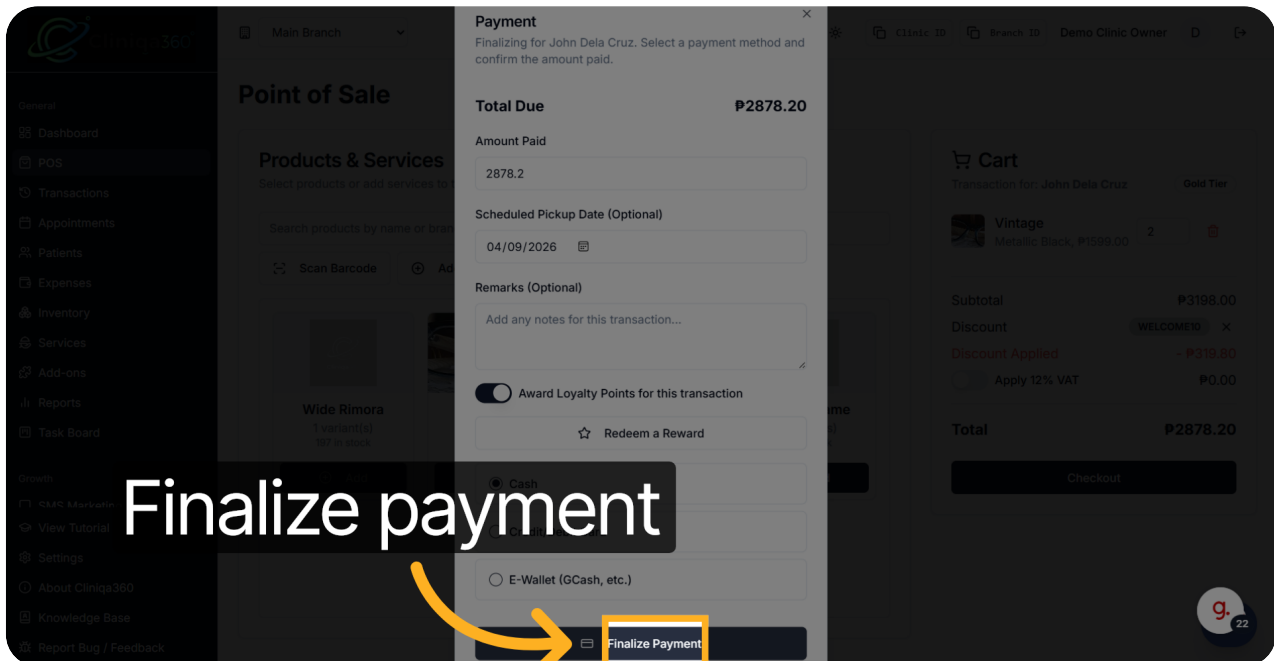
## 20 Select Cash Payment

Click "Cash" to choose cash as the payment method for the transaction.



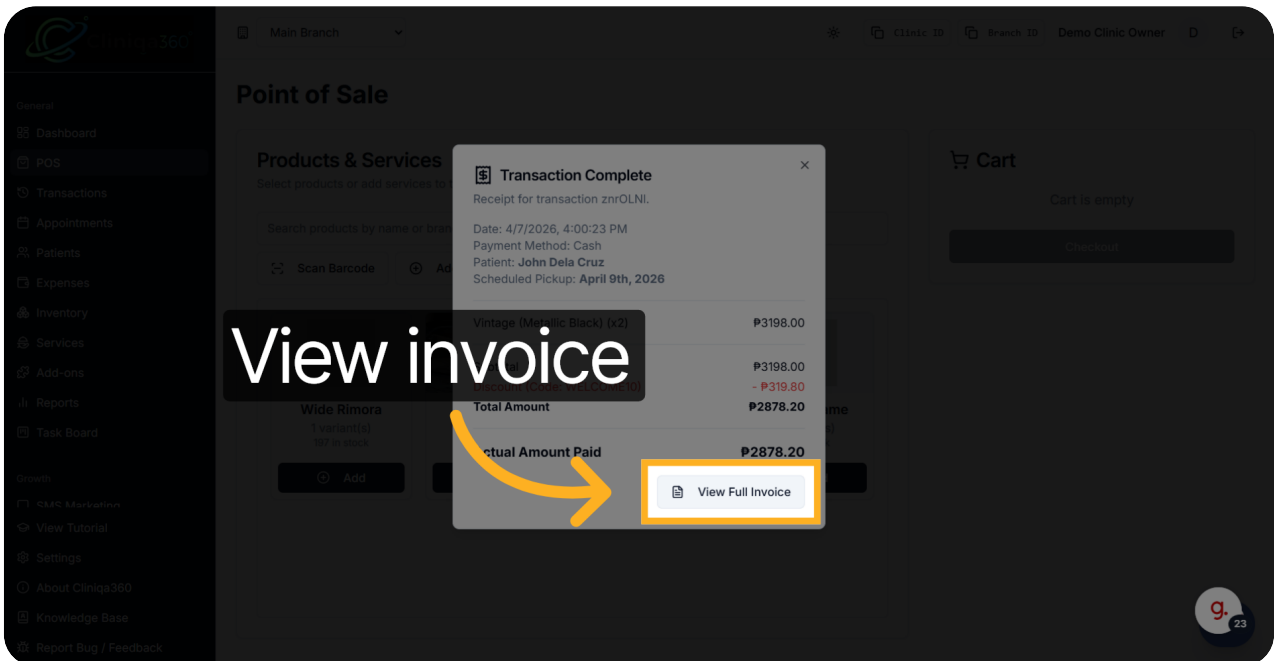
## 21 Complete Payment

Click "Finalize Payment" to complete the transaction and process the payment.



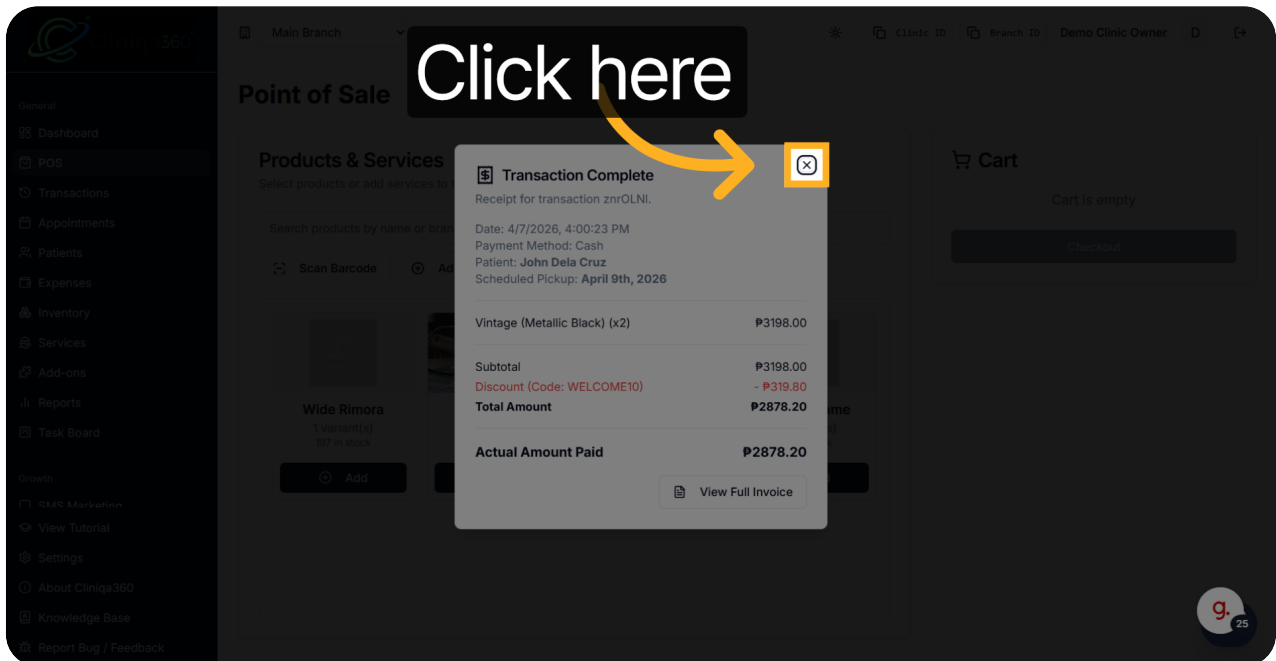
## 22 View Invoice Details

Click "View Full Invoice" to review the detailed invoice for the transaction.



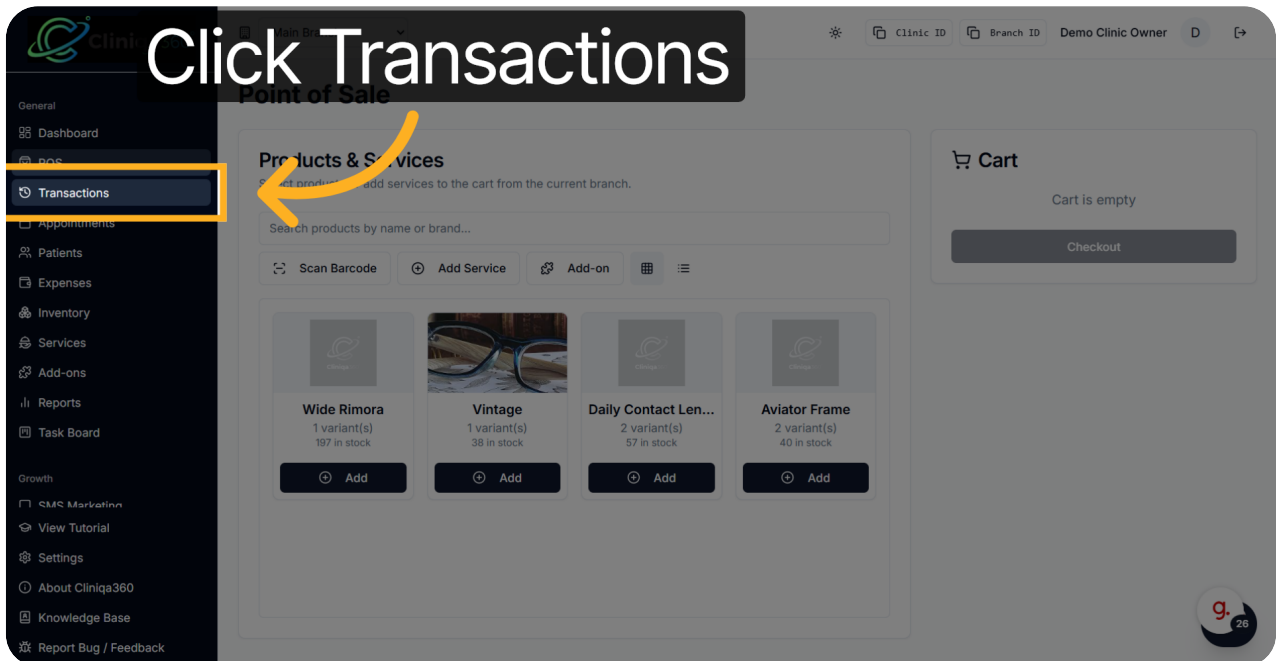
## 23 Access Additional Options

Click here to open more options within the Cliniqa360 platform.



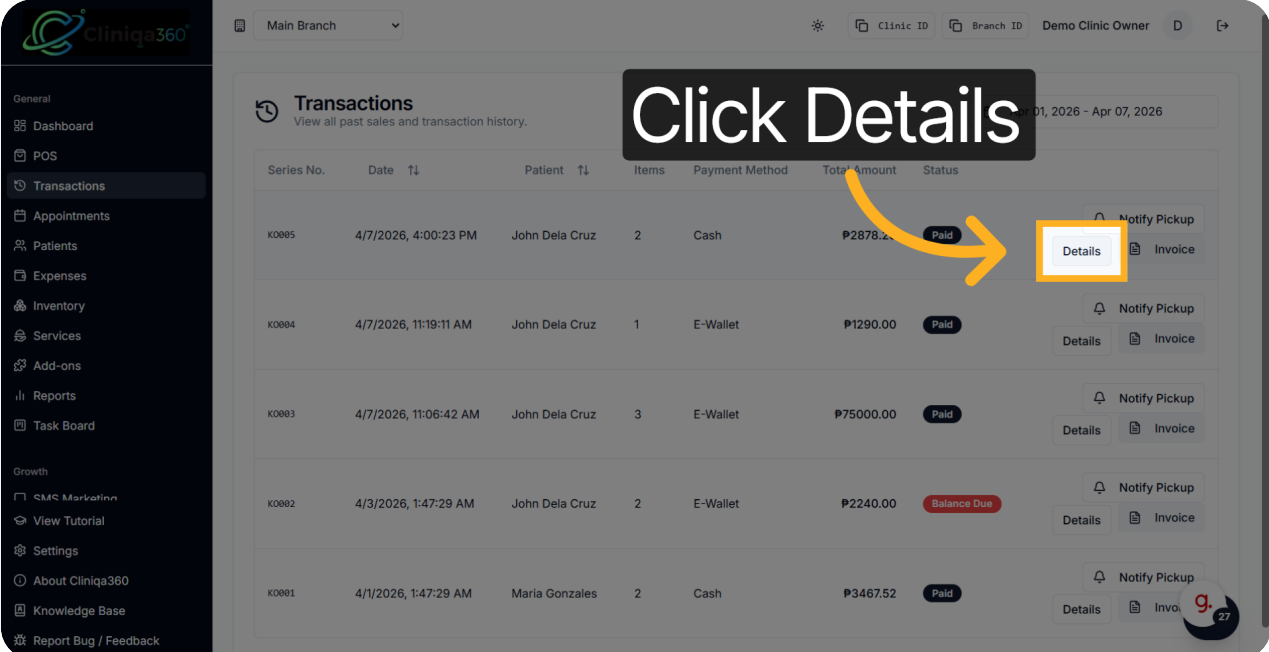
## 24 Open Transactions Section

Click "Transactions" to view the list of past transactions in the system.



## 25 View Transaction Details

Click "Details" to see specific information about a selected transaction.

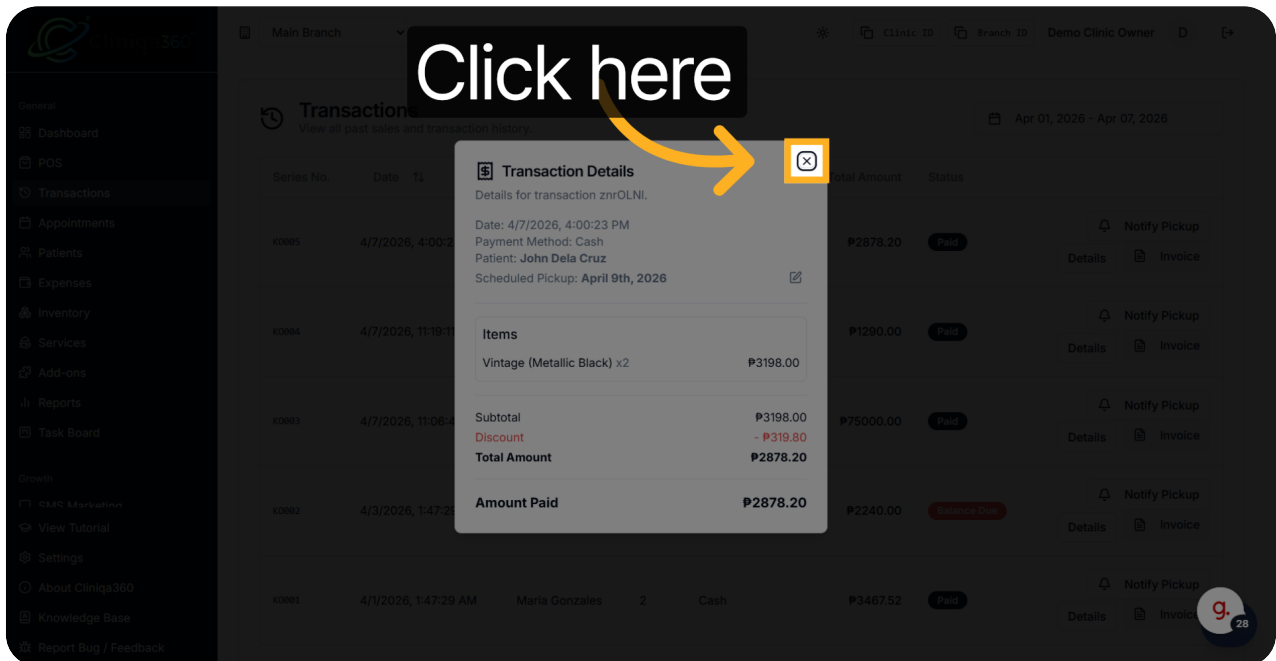


The screenshot displays the Clinica360 interface. On the left is a dark sidebar with navigation options: General (Dashboard, POS, Transactions, Appointments, Patients, Expenses, Inventory, Services, Add-ons, Reports, Task Board), Growth (CMS Marketing, View Tutorial, Settings, About Clinica360, Knowledge Base, Report Bug / Feedback), and a user profile icon. The main area is titled 'Transactions' and shows a table of past sales. A large black box with white text 'Click Details' and a yellow arrow points to the 'Details' button of the first transaction row. The table columns are Series No., Date, Patient, Items, Payment Method, Total Amount, and Status. The first row (K0005) shows a transaction on 4/7/2026 for John Dela Cruz, with 2 items, Cash payment, and a total amount of P2878.20, marked as 'Paid'. Other rows show transactions with 'Paid' or 'Balance Due' statuses.

Series No.	Date	Patient	Items	Payment Method	Total Amount	Status	Actions
K0005	4/7/2026, 4:00:23 PM	John Dela Cruz	2	Cash	P2878.20	Paid	Notify Pickup, Details, Invoice
K0004	4/7/2026, 11:19:11 AM	John Dela Cruz	1	E-Wallet	P1290.00	Paid	Notify Pickup, Details, Invoice
K0003	4/7/2026, 11:06:42 AM	John Dela Cruz	3	E-Wallet	P75000.00	Paid	Notify Pickup, Details, Invoice
K0002	4/3/2026, 1:47:29 AM	John Dela Cruz	2	E-Wallet	P2240.00	Balance Due	Notify Pickup, Details, Invoice
K0001	4/1/2026, 1:47:29 AM	Maria Gonzales	2	Cash	P3467.52	Paid	Notify Pickup, Details, Invoice

## 26 Access More Options

Click here to access additional transaction-related options.

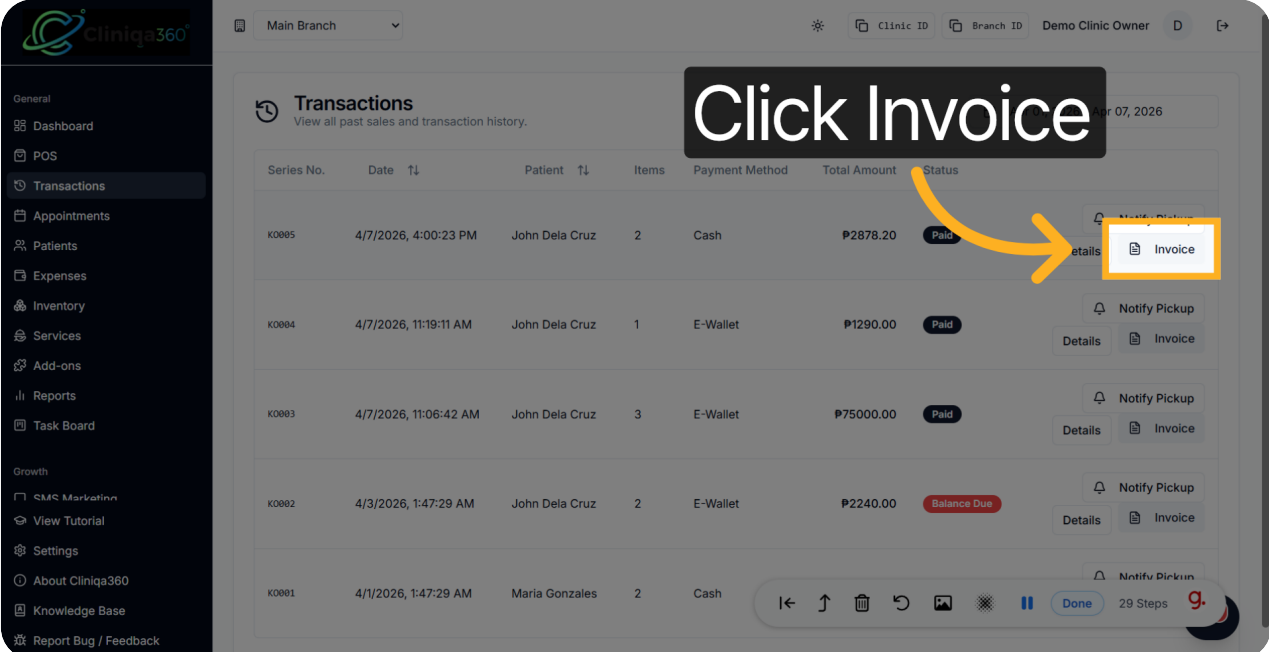


The screenshot shows a dark-themed application interface. On the left is a sidebar with navigation options: Dashboard, POS, Transactions, Appointments, Patients, Expenses, Inventory, Services, Add-ons, Reports, Task Board, Growth, CRM Marketing, View Tutorial, Settings, About Clinica360, Knowledge Base, and Report Bug / Feedback. The main area displays a 'Transaction' list with columns for Series No., Date, TI, Total Amount, Status, and actions (Notify Pickup, Details, Invoice). A modal window titled 'Transaction Details' is open, showing information for transaction 'znrOLNI'. The modal includes a close button (X) in the top right corner, which is highlighted with a yellow box and an arrow pointing to it from the text 'Click here' above. The modal content includes: Date: 4/7/2026, 4:00:23 PM; Payment Method: Cash; Patient: John Dela Cruz; Scheduled Pickup: April 9th, 2026; an 'Items' section with 'Vintage (Metallic Black) x2' for P3198.00; a Subtotal of P3198.00; a Discount of -P319.80; a Total Amount of P2878.20; and an Amount Paid of P2878.20. The background table shows several transaction rows with similar details.

Series No.	Date	TI	Total Amount	Status	Actions
10285	4/7/2026, 4:00:23		P2878.20	Paid	Notify Pickup, Details, Invoice
10284	4/7/2026, 11:19:11		P1290.00	Paid	Notify Pickup, Details, Invoice
10283	4/7/2026, 11:08:4		P75000.00	Paid	Notify Pickup, Details, Invoice
10282	4/3/2026, 1:47:2		P2240.00	Unpaid	Notify Pickup, Details, Invoice
10281	4/1/2026, 1:47:29 AM	Maria Gonzales 2	P3487.52	Paid	Notify Pickup, Details, Invoice

## 27 Open Invoice View

Click "Invoice" to display the invoice associated with the selected transaction.

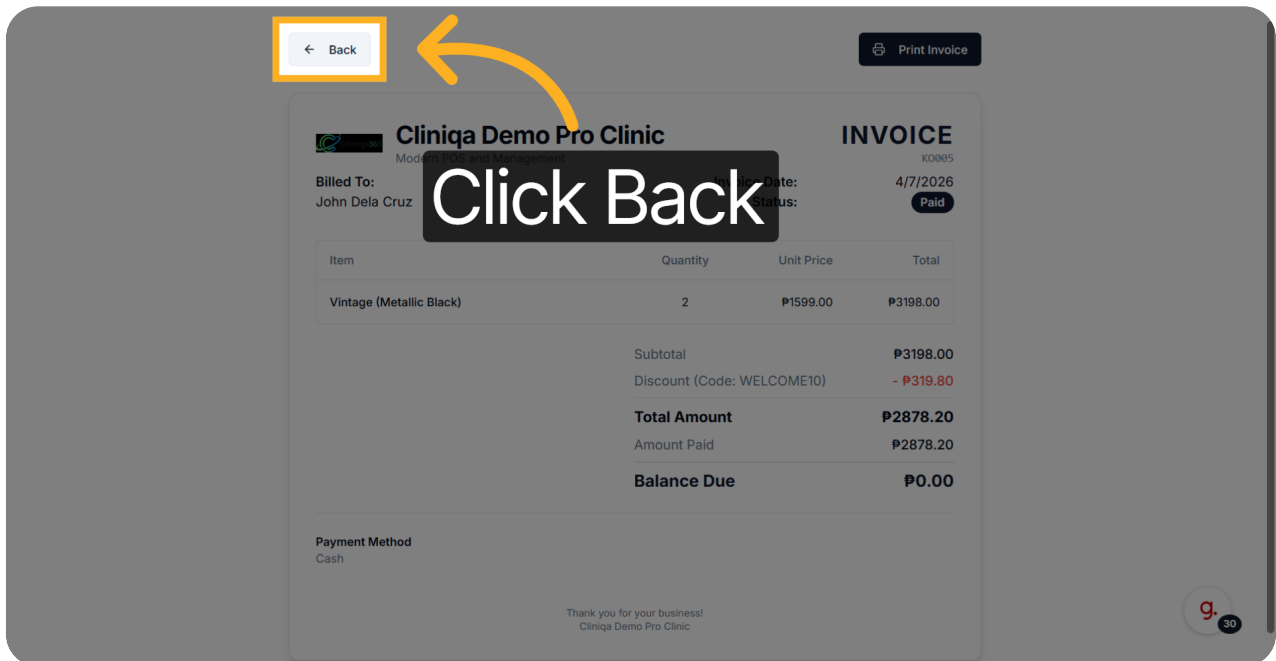


The screenshot displays the Clinica360 interface. On the left is a dark sidebar with a menu including: General (Dashboard, POS, Transactions, Appointments, Patients, Expenses, Inventory, Services, Add-ons, Reports, Task Board), Growth (CMS Marketing, View Tutorial, Settings, About Clinica360, Knowledge Base), and Report Bug / Feedback. The main content area is titled 'Transactions' and shows a table of transaction history. A large black box with the text 'Click Invoice' and a yellow arrow points to the 'Invoice' button in the actions column of the first transaction row. The table has columns for Series No., Date, Patient, Items, Payment Method, Total Amount, and Status. The first transaction (K0005) is for 4/7/2026, 4:00:23 PM, for John Dela Cruz, with 2 items, Cash payment, and a total amount of P2878.20, with a status of 'Paid'. Other transactions include K0004 (E-Wallet, P1290.00, Paid), K0003 (E-Wallet, P75000.00, Paid), K0002 (E-Wallet, P2240.00, Balance Due), and K0001 (Cash).

Series No.	Date	Patient	Items	Payment Method	Total Amount	Status	Actions
K0005	4/7/2026, 4:00:23 PM	John Dela Cruz	2	Cash	P2878.20	Paid	Notify Pickup, Details, Invoice
K0004	4/7/2026, 11:19:11 AM	John Dela Cruz	1	E-Wallet	P1290.00	Paid	Notify Pickup, Details, Invoice
K0003	4/7/2026, 11:06:42 AM	John Dela Cruz	3	E-Wallet	P75000.00	Paid	Notify Pickup, Details, Invoice
K0002	4/3/2026, 1:47:29 AM	John Dela Cruz	2	E-Wallet	P2240.00	Balance Due	Notify Pickup, Details, Invoice
K0001	4/1/2026, 1:47:29 AM	Maria Gonzales	2	Cash			Notify Pickup

## 28 Navigate Back

Click "Back" to return to the previous page from the invoice view.



The screenshot shows an invoice interface for 'Cliniqa Demo Pro Clinic'. At the top left, there is a button labeled '← Back' which is highlighted with a yellow border. A yellow arrow points from this button towards the center of the invoice. In the center, a large black box with the text 'Click Back' is overlaid. The invoice details include:

- Cliniqa Demo Pro Clinic** (K0005)
- Billed To:** John Dela Cruz
- Issue Date:** 4/7/2026
- Status:** Paid

Item	Quantity	Unit Price	Total
Vintage (Metallic Black)	2	₱1599.00	₱3198.00

Summary:

- Subtotal: ₱3198.00
- Discount (Code: WELCOME10): - ₱319.80
- Total Amount: ₱2878.20**
- Amount Paid: ₱2878.20
- Balance Due: ₱0.00**

Payment Method: Cash

Thank you for your business!  
Cliniqa Demo Pro Clinic

g. 30

## 29 Return to Dashboard

Click "Dashboard" to return to the Cliniqua360 platform's main dashboard and view the updated sales.

The screenshot shows the Cliniqua360 interface. On the left is a dark navigation menu with 'Dashboard' highlighted in a yellow box. A yellow arrow points from this box to the 'Transactions' page. A large white text box with the text 'Click Dashboard' is overlaid on the center of the screen. The main content area shows a table of transactions with columns for Series No., Date, Patient, Items, Payment Method, Total Amount, and Status. The table contains five rows of transaction data.

Series No.	Date	Patient	Items	Payment Method	Total Amount	Status
K0005	4/7/2026, 4:00:23 PM	John Dela Cruz	2	Cash	P2878.20	Paid
K0004	4/7/2026, 11:19:11 AM	John Dela Cruz	1	E-Wallet	P1290.00	Paid
K0003	4/7/2026, 11:06:42 AM	John Dela Cruz	3	E-Wallet	P75000.00	Paid
K0002	4/3/2026, 1:47:29 AM	John Dela Cruz	2	E-Wallet	P2240.00	Balance Due
K0001	4/1/2026, 1:47:29 AM	Maria Gonzales	2	Cash	P3467.52	Paid

You have successfully processed a POS transaction in Clinica360, including applying voucher codes, selecting patients, scheduling pickups, and finalizing payments. For further assistance, explore related tutorials on patient management and reporting features.

Powered by [guidde](#)