

Using Different Locations with Square in DrChrono

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You can set up different locations in Square to use for different offices or providers. Different bank accounts can be associated with different practice locations. You could also use the locations feature to represent different providers. You can associate the same or a different bank account with each location.

For example, if you have unique accounts for each office you can add the bank account for each office. Or if each of your providers has their own bank account, you can use Square's location feature to connect those accounts.

The screenshot shows the Square 'Account & Settings' interface. The 'Bank Accounts' section is active, displaying a table of configured bank accounts for different locations and providers. The table has columns for Location, Account Type, Account Info, and Status. Each entry includes a link to either 'Change Bank Account' or 'Add Bank Account'.

Location	Account Type	Account Info	Status
DrChrono Location 1			Change Bank Account
DrChrono Location 2	No Bank Account		Add Bank Account
Provider 1	No Bank Account		Add Bank Account
Provider 2	No Bank Account		Add Bank Account

- First you must add locations in Square. Go to the **Account & Settings** menu.

The screenshot shows the Square 'Home' dashboard with a grid of icons for various features. An arrow points to the 'Account & Settings' icon, which is a gear with a dollar sign.

Home Virtual Terminal Invoices

Reports Balance Transactions

Risk Manager Loans Account & Settings

Orders

- Go to **Locations** under the **Business** section and select **Create Location**.

Account & Settings DrChrono

Account ▾

Business ▲

Locations

→ [Create Location](#)

Nickname ▲	Location Type	Address	City, State	Phone	Email
DrChrono Location 1	Physical				
DrChrono Location 2	Physical				

Pricing & Subscriptions

Transfers

- Enter the location information and **Save**.

Location Details

[Save](#)

Basic Information

Location Business Name	DrChrono
Nickname	DrChrono Location 2

Your business name appears on your customers' card statements and digital receipts. If you don't have a business name, describe your goods or services and city, e.g., Taxi - New York.

Business Bio	Enter a brief bio about your business. Short descriptions are the most effective.
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Location Type	Physical Location ▼
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Business Address

Address Line 1	
Address Line 2	Address Line 2
City	

- If you would like to add an existing bank account to this location you and do so during location setup in step 3.

Location Details

Bank Information

All payments for this location will be transferred into the account below. You may choose an optional transfer tag to distinguish between locations on your bank statement.

Transfer Account	Select a Bank Account for Transfers ▼
Transfer Tag	Transfer Tag (max 5 characters)

- Once you have added the locations in Square, you can go to **Account** and select **Bank Accounts**. Click **Add Bank Account** next to the location.



Account ^

Personal Information

Bank Accounts

Email Notifications

Authorized
Representatives

Security

Get free processing

Business v

Square Accessories v

Online sales channels

Bank Accounts

Your funds will only be transferred into a verified bank account. Verification usually takes a few minutes, but for some banks can take up to 4 business days. If you change bank accounts, your money will continue to be transferred into your existing account until the new account is verified.

Once your bank account is verified, card payments are transferred into your account in 1-2 business days. Online sales are transferred the day after you complete the order. [Learn more about transfers >](#)

Location	Account Type	Account Info	Status
DrChrono Location 1			Change Bank Account
DrChrono Location 2	No Bank Account		Add Bank Account
Provider 1	No Bank Account		Add Bank Account
Provider 2	No Bank Account		Add Bank Account

- After completing the setup in Square, return to DrChrono. Go to **Account > Provider Settings** and go to the **Patient Payments** tab. Here you can select a default location.

Account Settings

Profile

General

Email

Medical Billing

eRx Info

Services

Usage

My Billing

Sample Data

Security

Patient Payments

General

Require balance Require an outstanding patient balance for credit card payments

Square

Connect to Square ✓ Connected Disconnect

Default Location ✓ DrChrono Location 1
DrChrono Location 2
Provider 1
Provider 2
[Update Square Settings](#)

- When processing a Square payment in DrChrono, you can select a location or provider in the payment window. This step is very important if you have different bank accounts associated with each location/provider.

New Cash



Code	Applied	Balance		Payment Type
1135F	\$ 20	\$75.00		Credit

Square

Location DrChrono Location 1
 DrChrono Location 2

Card Number

CVV

Expiration Date

Postal Code

Save card information

Customer Notes

Pay with card

Cancel