## 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.

|                               |  |   |   |   | Q       | ₽         | Ċ        | •        | 0                     |
|-------------------------------|--|---|---|---|---------|-----------|----------|----------|-----------------------|
| Account A                     | Bank Accounts  |   |   |   |         |           |          |          |                       |
| Personal Information          | Your funds will only be transferr<br>accounts, your money will conti | ed into a verified bank account.<br>nue to be transferred into your | Verification usually takes a few n<br>existing account until the new ac | ninutes, but for some banks o<br>count is verified. | an tak  | e up to 4 | 4 busine | ess day  | s. If you change bank |
| Bank Accounts                 | Once your bank account is veri<br>Learn more about transfers>        | ied, card payments are transfer                                     | rred into your account in 1-2 busir                                     | ness days. Online sales are tra                     | ansferr | ed the c  | day afte | r you co | omplete the order.    |
| Email Notifications           | Location   | Account Type  | Account Info  | Status  |         |           |          |          |                       |
| Authorized<br>Representatives | DrChrono Location 1  |   |   |   |         |           |          |          | Change Bank Account   |
| Security                      |  |   |   |   |         |           |          |          |                       |
| Get free processing           | DrChrono Location 2  | No Bank Account   |   |   |         |           |          |          | Add Bank Account      |
| Business ∨                    | Provider 1   | No Bank Account   |   |   |         |           |          |          | Add Bank Account      |
| Square Accessories V          |  |   |   |   |         |           |          |          |                       |
| Online sales channels         | Provider 2   | No Bank Account   |   |   |         |           |          |          | Add Bank Account      |

1. Add locations in Square by navigating to the Account & Settings menu.



2. Navigate to Locations under the Business section and select Create Location.

| ⊟ Account & Settings    |                     |               | o       |             | Q | Ģ | Ċ | Ē     | 0 | DrChrono        |
|-------------------------|---------------------|---------------|---------|-------------|---|---|---|-------|---|-----------------|
| Account ~               | Q                   |               |         |             |   |   |   |       |   | Create Location |
| Business ×              | Nickname 🔨          | Location Type | Address | City, State |   |   |   | Phone |   | Email           |
| Dricing & Subscriptions | DrChrono Location 1 | Physical      |         |             |   |   |   |       |   |                 |
| Transfers               | DrChrono Location 2 | Physical      |         |             |   |   |   |       |   |                 |

3. Enter the location information and press **Save**.

|   | Location Details  |
|---|---|
| <b>Basic Information</b>                                      |   |
| Location Business Name  | DrChrono  |
| Nickname  | DrChrono Location 2   |
| Your business name appears o<br>don't have a business name, d | on your customers' card statements and digital receipts. If you escribe 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.   |
|   |   |
|   |   |
| Location Type   | Physical Location   |
| 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 can do so during location setup in step 3.

|                              | Location Details   |   |
|------------------------------|--|---|
| ank Information              |  |   |
| Il payments for this locatio | on will be transferred into the account below. You may choose an |   |
| otional transfer tag to dist | inguish between locations on your bank statement.                |   |
| Transfer Account             | Select a Bank Account for Transfers                              | ~ |
|                              | Transfer Tag (max 5 characters)                                  |   |
|                              | Transfer Tag (max 5 characters)                                  |   |

5. Once you have added the locations in Square, navigate to Account and select Bank Accounts. Press Add

## Bank Account next to the location.

| ⊟ Account & Settings          |  |   | D   |   | Q        | ₽         | Ų        | Ē        | 0                     |
|-------------------------------|--|---|---|---|----------|-----------|----------|----------|-----------------------|
| Account A                     | Bank Accounts  |   |   |   |          |           |          |          |                       |
| Personal Information          | Your funds will only be transferr<br>accounts, your money will conti | ed into a verified bank account. Ve<br>nue to be transferred into your exis | rification usually takes a few m<br>sting account until the new acc | ninutes, but for some banks o<br>count is verified. | can take | e up to 4 | 1 busin  | ess day: | s. If you change bank |
| Bank Accounts                 | Once your bank account is verifi<br>Learn more about transfers >     | ed, card payments are transferred   | l into your account in 1-2 busir                                    | ness days. Online sales are tra                     | ansferre | ed the c  | lay afte | r you co | mplete the order.     |
| Email Notifications           | Location   | Account Type  | Account Info  | Status  |          |           |          |          |                       |
| Authorized<br>Representatives | DrChrono Location 1  |   |   |   |          |           |          |          | Change Bank Account   |
| Security                      |  |   |   |   |          |           |          |          |                       |
| Get free processing           | DrChrono Location 2  | No Bank Account   |   |   |          |           |          |          | Add Bank Account      |
| Business ✓                    | Provider 1   | No Bank Account   |   |   |          |           |          |          | Add Bank Account      |
| Square Accessories 🗸          |  |   |   |   |          |           |          |          |                       |
| Online sales channels         | Provider 2   | No Bank Account   |   |   |          |           |          |          | Add Bank Account      |

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

| Acco    | unt Set | ttings    |                  |  |                  |               |                   |             |          |                  |
|---------|---------|-----------|------------------|--|------------------|---------------|-------------------|-------------|----------|------------------|
| Profile | General | Email     | Medical Billing  | eRx Info   | Services         | Usage         | My Billing        | Sample Data | Security | Patient Payments |
| Genera  | ıl      |           |                  |  |                  |               |                   |             |          |                  |
|         |         | Require   | ə balance 🗌 Requ | iire an outstan                                  | ding patient bal | ance for crec | lit card payments | 3           |          |                  |
| 🖸 Sq    | Jare    |           |                  |  |                  |               |                   |             |          |                  |
|         |         | Connect t | o Square 🗸 Cor   | nected Dis                                       | sconnect         |               |                   |             |          |                  |
|         |         | Default   | Location         | rono Location<br>rono Location<br>der 1<br>der 2 | n 1<br>n 2       | practice gr   | pup               |             |          |                  |
|         |         |           | Upda             | te Square Se                                     | ettings          |               |                   |             |          |                  |

7. 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.

| Code  | Applied               | Balance                  | Payment Type |  |
|-------|-----------------------|--------------------------|--------------|--|
| 1135F | \$ 20                 | \$75.00                  | Credit 🗸     |  |
| Squ   | lare                  |                          |              |  |
|       | Location              | ✓ DrChrono Location 1    |              |  |
|       | Card Number           | DrChrono Location 2      |              |  |
|       |                       | Provider 1<br>Provider 2 |              |  |
|       | CVV                   |                          |              |  |
|       | Expiration Date       | MM/YY                    |              |  |
|       | Postal Code           |                          |              |  |
|       |                       | Save card information    |              |  |
| Cus   | tomer Notes <b>()</b> |                          |              |  |
|       |                       |                          | 11           |  |
|       |                       | Pay with card            |              |  |