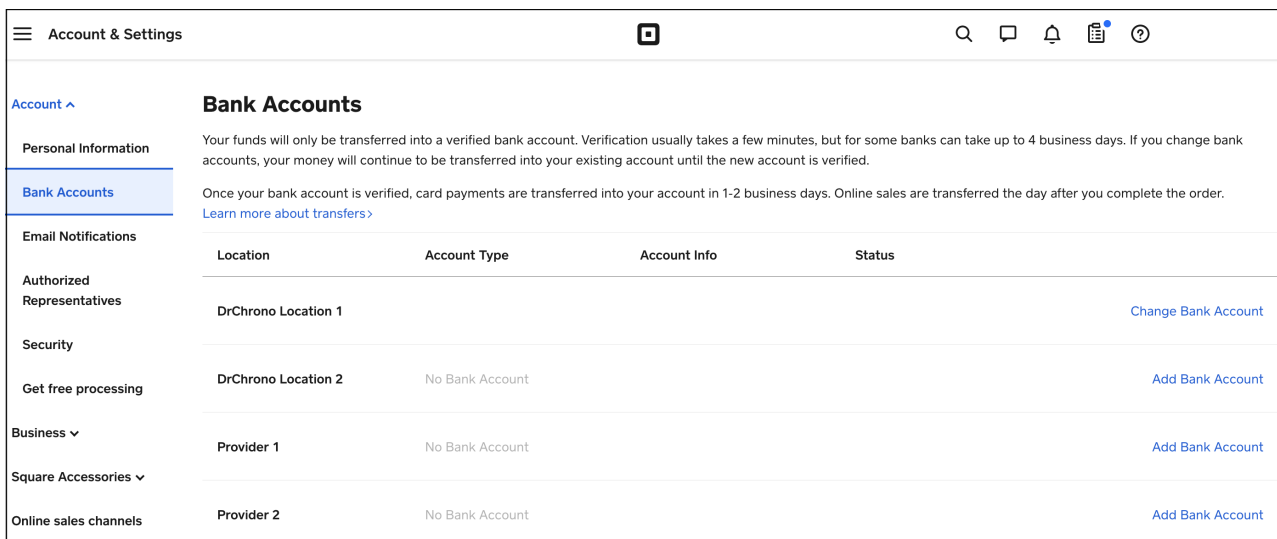


Using Different Locations with Square in DrChrono

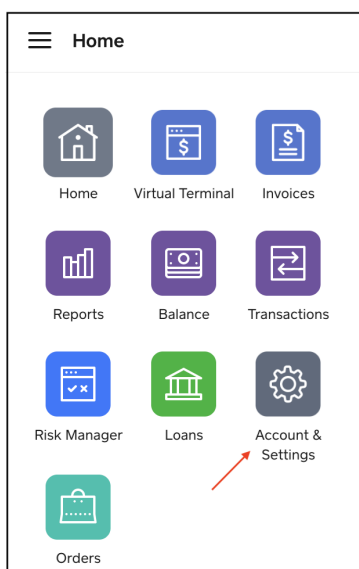
Last modified on 03/10/2025 9:21 am EDT

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.

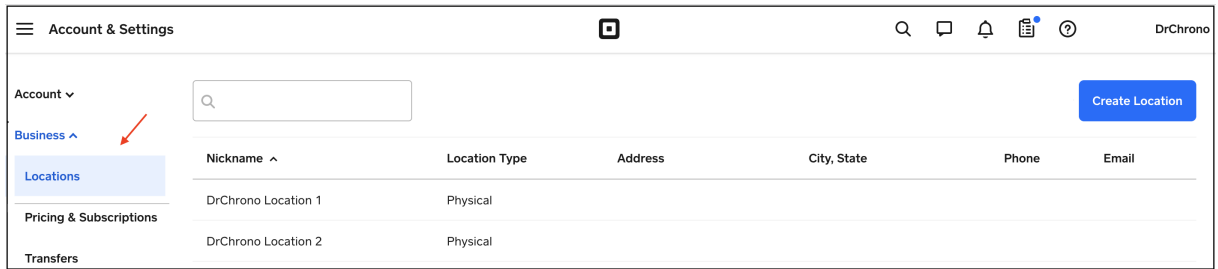
For example, if you have unique accounts for each office you can add the bank account for each office. Or if each of your providers has their own bank account, you can use Square's location feature to connect those accounts.



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



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



3. Enter the location information and press **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.
Location Type	Physical Location ▼

Business Address

Address Line 1	
Address Line 2	Address Line 2
City	

4. 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

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)

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

Bank Account next to the location.

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

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.

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

Connect to Square Connected Disconnect

Default Location practice group


- ✓ DrChrono Location 1
- DrChrono Location 2
- Provider 1
- Provider 2

[Update Square Settings](#)

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.

New Cash ✕

Code	Applied	Balance	Payment Type
1135F	\$ 20	\$75.00	1 Credit ▼

 Square

Location ✓ DrChrono Location 1
DrChrono Location 2
Provider 1
Provider 2

Card Number

CW

Expiration Date

Postal Code

Save card information

Customer Notes ⓘ

Pay with card

Cancel