

Estimates

01/08/2025 1:43 pm BST

Summary

The Estimates tab within the Treatment screen is used to view, print and process created estimates. Estimates are created in the 'Add Treatment' screen.

Details

Create an Estimate

1. Navigate to the Add Treatment Screen (Treatment > Add Treatment Tab).
2. Add all the treatments to the treatment draft (as described in [Adding a Treatment](#)).
3. Once all the treatments have been added, select the 'Save As Estimate' button.

The screenshot shows the 'Treatment' screen with a top toolbar containing buttons: Save, Save As Estimate (highlighted with a red box), Save to Pre-Invoice, Empty, Delete, Doc Mgmt, Consent, and a pencil icon. Below the toolbar are tabs: History, Pre-Invoice, Add Treatment (selected), Prescriptions, Saved Estimates, and Documents. On the left is a 'Codes' sidebar with icons for ALL, Consultation, Tablet, and Injections S... The main area has a form with 'Item Date' (01/08/2025), 'MWI Pharmacy' (selected), 'Description' (search using a minimum of 2 characters), 'Code', 'Dispense from' (Esher), and a 'Draft Items' table.

Date	Patient	Description	Clinical Code	Qty
01/08/2025	Morris	Castrate Dog	General	1
01/08/2025	Morris	Acp 5mg/ml (calmivet) Per MI	General	1
01/08/2025	Morris	Vetergesic Per MI	General	1

4. A window will appear asking for further details regarding the estimate.

The 'Save As Estimate' dialog box contains the following fields and options:

- Description: Dog Castrate
- Expiry Date: 15/08/2025
- Limits:
☐ Upper ☒ Lower
- Buttons: OK, Cancel

5. Description = Description for estimate.

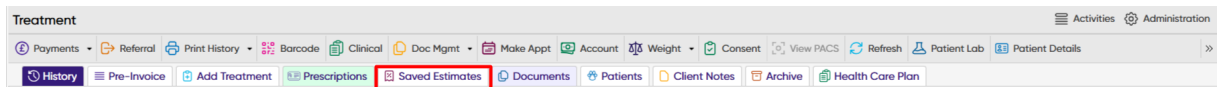
6. Expiry Date = Period the estimate is valid until.

Upper/Lower Limits = Indicates if the estimate will cost up to or at least the amount stated.

7. Select 'OK' to save the estimate. The estimated is added to the 'Saved Estimates' tab.

Viewing Estimates

1. Select the Saved Estimates tab within the Treatment Screen.



2. All estimates are visible in the upper half of the screen. Select the estimate you wish to view.

The screenshot shows the 'Treatment' screen with the 'Saved Estimates' tab selected. A table displays a single estimate with the following data:

Estimate No	Site	Date	Expires	Type	Estimate Description	Net	VAT	Total	Patient	Client	Created By
600073	Esher SA	01/08/2025	15/08/2025	Lower	Dog Castrate	112.97	22.59	135.56	Morris	Mrs Jack Lowe	Jupiter

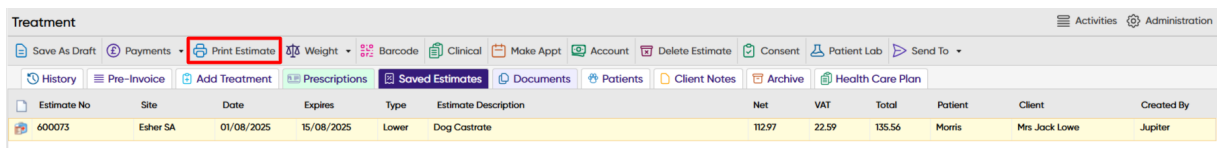
3. The contents of the estimate are displayed in the lower half of the screen.

The screenshot shows the 'Treatment' screen with the 'Saved Estimates' tab selected. The details of the estimate are displayed in a table with the following data:

Date	Description	Clinical Code	Surgeon	Qty	Net	VAT	Total	Grp
01/08/2025	Castrate Dog	General	Jamie Smith	1	112.97	22.59	135.56	
01/08/2025	Acp 5mg/ml (calmivet) Per Mi	General	Jamie Smith	1	0.00	0.00	0.00	
01/08/2025	Wetgesic Per Mi	General	Jamie Smith	1	0.00	0.00	0.00	

Print an Estimate

1. Select the estimate in the upper half of the screen.
2. Select the 'Print Estimate' button.



3. A PDF document is generated.

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Please note the figure(s) shown are an estimate only, based on the procedures and tests foreseen at the time the estimate was made. The cost of drugs which will be required during Morris 's stay with us and any follow up treatments are not included since these will vary between individual animals.

Printed at Site: Esher SA
Estimate prepared for Mrs Jack Lowe
Expires on 15/08/2025
Client Address: 18
Wakefield
WF2 WF2

Patient: Morris

Item Date	Description	Qty	Net	Vat	Cost
01/08/2025 13:37	Castrate Dog	1.00	112.97	22.59	135.56
01/08/2025 13:37	Acp 5mg/ml (calmivet) Per Ml	1.00	0.00	0.00	0.00
01/08/2025 13:37	Vetergesic Per Ml	1.00	0.00	0.00	0.00
01/08/2025 13:37	Duphamox Rtu Inj 100ml	1.00	0.00	0.00	0.00
01/08/2025 13:37	Alfaxan Injection 10ml	1.00	0.00	0.00	0.00
Total			112.97	22.59	135.56

If unforeseen procedures are found to be necessary we will always try to contact you first, therefore please make sure we have your daytime telephone number. If you cannot be contacted we will carry out whatever treatments or procedures the veterinary surgeon considers is in the best interest of Morris. This estimate is only valid for 90 days

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Processing an Estimate back to draft

1. Select the estimate in the upper half of the screen.
2. Select the 'Save As Draft' button

Treatment
Activities Administration

Save As Draft
Payments
Print Estimate
Weight
Barcode
Clinical
Make Appt
Account
Delete Estimate
Consent
Patient Lab
Send To

History
Pre-Invoice
Add Treatment
Prescriptions
Saved Estimates
Documents
Patients
Client Notes
Archive
Health Care Plan

Estimate No	Site	Date	Expires	Type	Estimate Description	Net	VAT	Total	Patient	Client	Created By
600073	Esher SA	01/08/2025	15/08/2025	Lower	Dog Castrate	112.97	22.59	135.56	Morris	Mrs Jack Lowe	Jupiter

3. The items will be added to the Add Treatment draft.
4. This work can be added to/edited/deleted as required using double click (permission based)
5. Select 'Save' to save the work to the patient's Treatment History.