

Pre-Invoice

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Summary

The Pre-Invoice tab can be enabled by Species, see [Reception Setting](#) for further details. This screen is used to invoice clients over a long period rather than generating an invoice each time the 'Save' button is selected.

Details

Add to Pre-Invoice

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 to Pre-Invoice' button.

The screenshot shows the 'Treatment' screen with the 'Save to Pre-Invoice' button highlighted in red. The interface includes a top toolbar with buttons like 'Save', 'Save As Estimate', 'Save to Pre-Invoice', 'Empty', 'Delete', 'Doc Mgmt', 'Consent', 'Manual', 'Barcode', 'Clinical', 'Weight', 'Patient Lab', 'Formulary (F10)', and 'Send To'. Below the toolbar is a 'Pre-Invoice' tab with a sub-tab 'Add Treatment'. The main area contains a form for adding treatments, including fields for 'Item Date', 'MWI Pharmacy', 'Description', 'Code', 'Clinical Code', 'Patient', and 'Surgeon'. A table below the form lists draft items with columns for Date, Patient, Description, Clinical Code, Qty, Net, VAT, Total, Surgeon, Site, Gp, Computer, Modified, Modified By, and HCP.

Invoice Pre-Invoice Items - All Clients and Patients

It is possible to invoice all pre-invoice items in bulk. For information, see the [Create Monthly Invoices](#) page.

Invoice Pre-Invoice Items - By Patient

1. To invoice an individual patient, follow the steps below:
2. Navigate to the Pre-Invoice tab (Treatment > Pre-Invoice Tab).
3. Select an option:
Invoice All = Creates an invoice for all pre-invoice items for the patient.

Invoice Selected = Invoices any highlighted items for the patient.

Invoice Range = Invoices any items within a date range specified.

The screenshot shows the 'Pre-Invoice' screen with the 'Invoice All', 'Invoice Selected', and 'Invoice Range' buttons highlighted in red. The interface includes a top toolbar with buttons like 'Invoice All', 'Invoice Selected', 'Invoice Range', 'Print', 'Empty', 'Delete', 'Refresh', 'Payments', 'Barcode', 'Clinical', 'Make Appt', 'Account', 'Weight', 'Consent', 'Patient Lab', and 'Send To'. Below the toolbar is a 'Pre-Invoice' tab with a sub-tab 'Add Treatment'. The main area contains a form for filtering items, including fields for 'Filters: Description', 'Clinical Code', and 'Type'. A table below the form lists items with columns for Date, Time, Description, Clinical Code, Qty, Net, VAT, Total, Surgeon, Site, and Group.

4. Any invoiced items are saved under the Treatment History tab and appear in the accounts screen.