Pre-Invoice

01/08/2025 1:48 pm BST

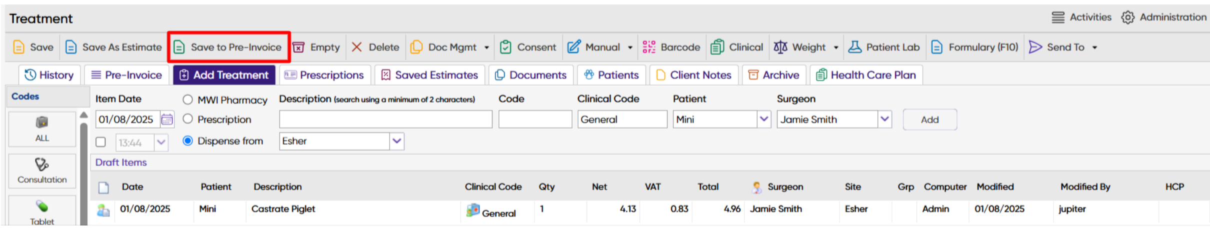
Summary

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.



Invoice Pre-Invoice Items - All Clients and Patients

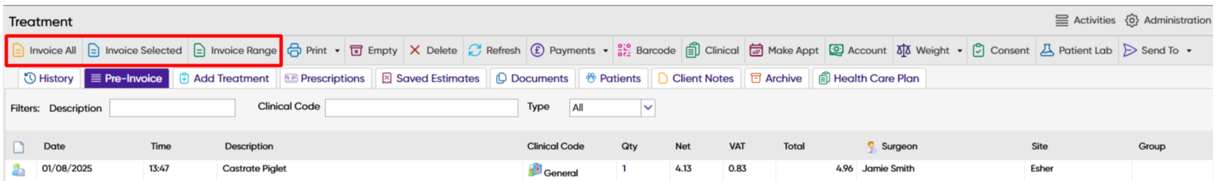
It is possible to invoice all pre-invoice items in bulk. For information, see theCreate Monthly Invoices page.

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.



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