

Create Monthly Invoices

23/10/2024 4:29 pm BST

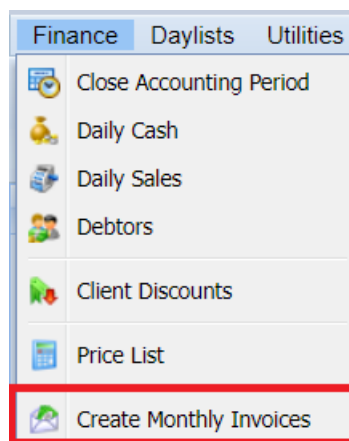
Summary

This feature offers an alternative to manually invoicing by animal. It allows you to invoice all customers who have had treatments between specified dates in batch.

Any items that have been added to the 'Pre-Invoice' tab in the Treatments Screen for all clients are invoiced (assigning an invoice number for each client).

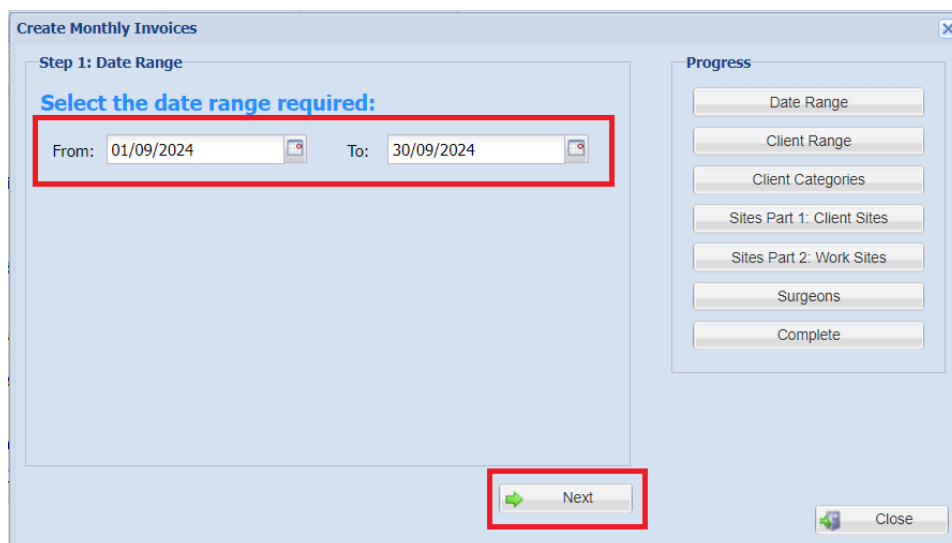
Details

The 'Create Monthly Invoices' screen can be accessed via the top menu (Finance -> Create Monthly Invoices).



Using Create Monthly Invoices wizard

1. Enter the dates ('**From**' and '**To**') you are invoicing treatment for and select **Next**.

A screenshot of the 'Create Monthly Invoices' wizard. The window title is 'Create Monthly Invoices'. It has a 'Step 1: Date Range' section with the instruction 'Select the date range required:'. Below this, there are two date input fields: 'From: 01/09/2024' and 'To: 30/09/2024'. These fields are highlighted with a red rectangular box. At the bottom right, there is a 'Next' button with a green arrow icon, also highlighted with a red rectangular box. To the right of the main input area is a 'Progress' section with a list of steps: 'Date Range', 'Client Range', 'Client Categories', 'Sites Part 1: Client Sites', 'Sites Part 2: Work Sites', 'Surgeons', and 'Complete'. The 'Date Range' step is currently selected. At the bottom right of the window is a 'Close' button.

2. Enter the Clients Surname range ('**From**' and '**To**') you are running the Invoicing for (0 to zzz

will select all clients). Select **Next**.

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Step 2: Client Range

Select the client range required (by Surname):

From: 0 To: zzz

Progress

- ✓ Date Range
- Client Range
- Client Categories
- Sites Part 1: Client Sites
- Sites Part 2: Work Sites
- Surgeons
- Complete

Previous Next Close

3. Select the **Client Categories** you wish to invoice using the arrows provided (i.e. you may only wish to invoice Large Animal clients). Select **Next**.

Create Monthly Invoices

Step 3: Client Categories

Select the client categories required:

Available Categories: Farm, Mixed, Charity, Bad Debtors, Prospect, Referrals, Staff

Selected Categories: Small Animal, Equine

Progress

- ✓ Date Range
- ✓ Client Range
- Client Categories
- Sites Part 1: Client Sites
- Sites Part 2: Work Sites
- Surgeons
- Complete

Previous Next Close

4. Select the **Client Sites** you wish to invoice using the arrows provided (Client's Registered Site). Select **Next**.

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Step 4: Client Sites

Select the sites the client should be registered at:

Available Sites: Ascot, Basingstoke, Bournemouth, Chelmsford, Cheltenham, Chester, Derby, Exeter, Glasgow

Selected Sites: Esher, Walton

Progress

- ✓ Date Range
- ✓ Client Range
- ✓ Client Categories
- Sites Part 1: Client Sites
- Sites Part 2: Work Sites
- Surgeons
- Complete

Previous Next Close

5. Select the **Work Sites** you wish to invoice (Work Site refers to the site the treatment was recorded at). Select **Next**.

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Step 5: Work Sites

Select the sites the work should have been entered at:

Available Sites: Cheltenham, Chester, Derby, Exeter, Glasgow, Lincoln, Portsmouth, Shrewsbury, York

Selected Sites: Esher, Walton

Progress:

- ✓ Date Range
- ✓ Client Range
- ✓ Client Categories
- ✓ Sites Part 1: Client Sites
- Sites Part 2: Work Sites
- Surgeons
- Complete

Previous Next Close

6. Select the **Surgeons** work you wish to invoice using the arrows provided. Select **Next**.

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Step 6: Surgeons

Select the surgeons the work should have been done by:

Available Surgeons:

Selected Surgeons: T Pointer (TPointer), Andrew Black (AB), Olivia Lowe (OL10.), Keith Chalmers (KC), Raggan Singh (RS), John Smith (JS), Katie Lawn (KL)

Progress:

- ✓ Date Range
- ✓ Client Range
- ✓ Client Categories
- ✓ Sites Part 1: Client Sites
- ✓ Sites Part 2: Work Sites
- Surgeons
- Complete

Previous Next Close

7. The final step is to complete the '**Create Monthly Invoice**' using the three available buttons:

Create Monthly Invoices

Step 7: Complete

Check your parameters...

Date Range: 01/09/2024 to 30/09/2024

Client Range: '0' to 'zzz'

Client Categories: Small Animal, Equine

Client Sites: Esher, Walton

Work Sites: Esher, Walton

Surgeons: All Surgeons

☒ Include Credit Notes for Printing Invoices

And Select the action you'd like to take:

Progress

- ☒ Date Range
- ☒ Client Range
- ☒ Client Categories
- ☒ Sites Part 1: Client Sites
- ☒ Sites Part 2: Work Sites
- ☒ Surgeons
-

Print Pre-Invoice Items

Generates a PDF document, which you can print or save to your computer, of all items that are currently in the Pre-Invoice tab which meet the requirements of your filters. These are the items that are set to be invoiced.

Invoice Pre-Invoice Items

This button executes the invoicing of the Pre-Invoice items. Once selected, all of the Pre-Invoice items specified on the 'Print Pre-Invoice Items' list will be invoiced and moved from the Pre-Invoice tab to the Treatment History tab for each Client and Animal.

Note: Once this button has been selected, you cannot undo this action.

Print Invoices

Once the above process has been completed, invoices can be generated using the 'Print Invoices' button. Selecting this button will generate a PDF for you to check before printing.

Email Invoices

Invoices can be emailed via Finance > [Debtors](#).