

Creating an Invoice



The Invoice Manager may require enabling in the *Invoicing Category* within Edit Application Settings before you can access these features.



You can only create invoices for patients and their corresponding items for invoice lines which have previously been deleted from unissued invoices within the Invoice Manager.

1. To begin, open the Invoice Manager from the ProScript Connect Main Screen by clicking the **[ProScript Connect]** menu button and selecting the *Invoice Manager* menu item.
2. From the Invoice Manager, select the **[Create Invoice]** button. The Select a Prescribed Item window displays.

Select a Prescribed Item

HUXLEY, Derek (Mr)
7 Leavesden Road, Watford, Hertfordshire, WD24 6EE

DOB 06 Nov 1974
Age 43 years 2 months

NHS No 999 999 9670
EPS Status ●

PAYING

Filters

Patient	Period	Rx Types
<input style="width: 90%;" type="text" value="Search Patient"/>	Period Last 90 Days	<input checked="" type="checkbox"/> OTC Sales <input checked="" type="checkbox"/> Private Prescriptions <input checked="" type="checkbox"/> Veterinary Scripts <input checked="" type="checkbox"/> Patient Request
<input type="button" value="Reset Filters"/>	From 26/10/2017 To 24/01/2018	

Prescription Date	Patient Details	Prescribed Drug	Quantity	Price	Rx Type
Wed 24/01/2018	HUXLEY, Derek (Mr) (06/11/1974)	Penicillin V 250mg tabs	28.00	6.70	Private

3. Use the available *Filters* to search for, locate and highlight the relevant patient and corresponding item in the grid. Select the **[F10 – Select]** button.
4. A blank invoice form for the selected patient and item displays. From here you can:
 - Amend the *Invoice To* drop-down to the patient or prescriber
 - Amend various *Additional Information* such as the invoice *Status*, *Payment Terms* and *Discount*. Selecting the **[F7 – Discount]** button will open the Discount window where you can select a pre-defined discount percentage, which can be applied to the selected item only using the corresponding tick box if applicable and required.

- Add notes, or select the **[F6 – Select Existing Note]** button to select a previously saved note from the Select Message window. From this window you can also add, edit and delete a saved note.
- Add additional items which have been previously deleted from unissued invoices for the same patient from the Select Invoice Item window by selecting the **[Add Item]** button.
- Delete items where more than one line item exists by selecting the **[Delete Item]** button.
- Edit the cost, margin, dispensing charges and discount for the line item from the Change Price window by selecting the **[Edit Price]** button.
- See a preview of the invoice by selecting the **[F8 – Preview]** button.
- Issue the invoice by selecting the **[Issue Invoice]** button. This will open a preview of the invoice which you can print or save, and will automatically mark the invoice as **Issued**.

New Invoice for patient HUXLEY, Derek (Mr)

HUXLEY, Derek (Mr)
7 Leavesden Road, Watford, Hertfordshire, WD24 6EE

DOB 06 Nov 1974
Age 43 years 2 months

NHS No 999 999 9670
EPS Status ●

PAYING

Invoice To

HUXLEY, Derek (Mr) (Patient)

7 Leavesden Road
Watford
Hertfordshire
WD24 6EE

Additional Information

Status: Unissued

Tax Point Date: 24/01/2018

Payment Terms: 28 days

F7 - Discount: 0.00 %

Delivery Charge £: 0.00

Delivery VAT £: 0.00

Note

F6 - Select Existing Note

Add Item

Delete Item

Edit Price

Date	Prescribed Drug	Quantity	Price	VAT	Discount	Item Total
24/01/2018	Penicillin V 250mg tabs	28.00	6.70	0.00	0.00%	6.70

VAT Added

No VAT

Invoice Total: £ 6.70

F8 - Preview

Issue Invoice

✓ F10 - Save

✗ Close

5. Save your changes by selecting the **[F10 – Save]** button. You are returned to the Invoice Manager with the newly-added invoice displayed in the grid.

Revision History

Version Number	Date	Revision Details	Author(s)
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1.0	03 October 2019		Joanne Hibbert-Gorst

Contact us

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