

Editing an Invoice



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



You will only have full editing capability for invoices that are currently **Unissued** or **Queried**. If your invoice is **Issued**, **Paid** or **Void**, you will only be able to edit the *Status* and *Preview* the invoice. To have full editing capability for an **Issued**, **Paid** or **Void** invoice, you must first change the *Status* to **Unissued** or **Queried**.

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, highlight an invoice in the grid and select the **[Edit Invoice]** button. The Edit Invoice form for the selected patient displays.

Edit 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	Additional Information	Note
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> HUXLEY, Derek (Mr) (Patient) </div> <div style="border: 1px solid #ccc; padding: 5px;"> 7 Leavesden Road Watford Hertfordshire WD24 6EE </div>	<p>Status Unissued ▼</p> <p>Tax Point Date 24/01/2018 15</p> <p>Payment Terms 28 days</p> <p>F7 - Discount 0.00 %</p> <p>Delivery Charge £ 0.00</p> <p>Delivery VAT £ 0.00</p>	<div style="border: 1px solid #ccc; height: 100px;"></div> <p style="text-align: right; font-size: 0.8em; margin-top: 5px;">F6 - Select Existing Note</p>

Add Item
Delete Item
Edit Price

F8 - Preview
Issue Invoice

Date	Prescribed Drug	Quantity	Price	VAT	Discount	Item Total
24/01/2018	Olive oil ear drops	10.00	6.70	0.00	0.00%	6.70

VAT Added No VAT

Invoice Total: £ 6.70

F8 - Preview
Issue Invoice

✓ F10 - Save
✖ Close

3. 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**.
4. Save your changes by selecting the **[F10 – Save]** button.

Revision History

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

Contact us

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