

Merging/Unmerging Invoices



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

Merging Invoices

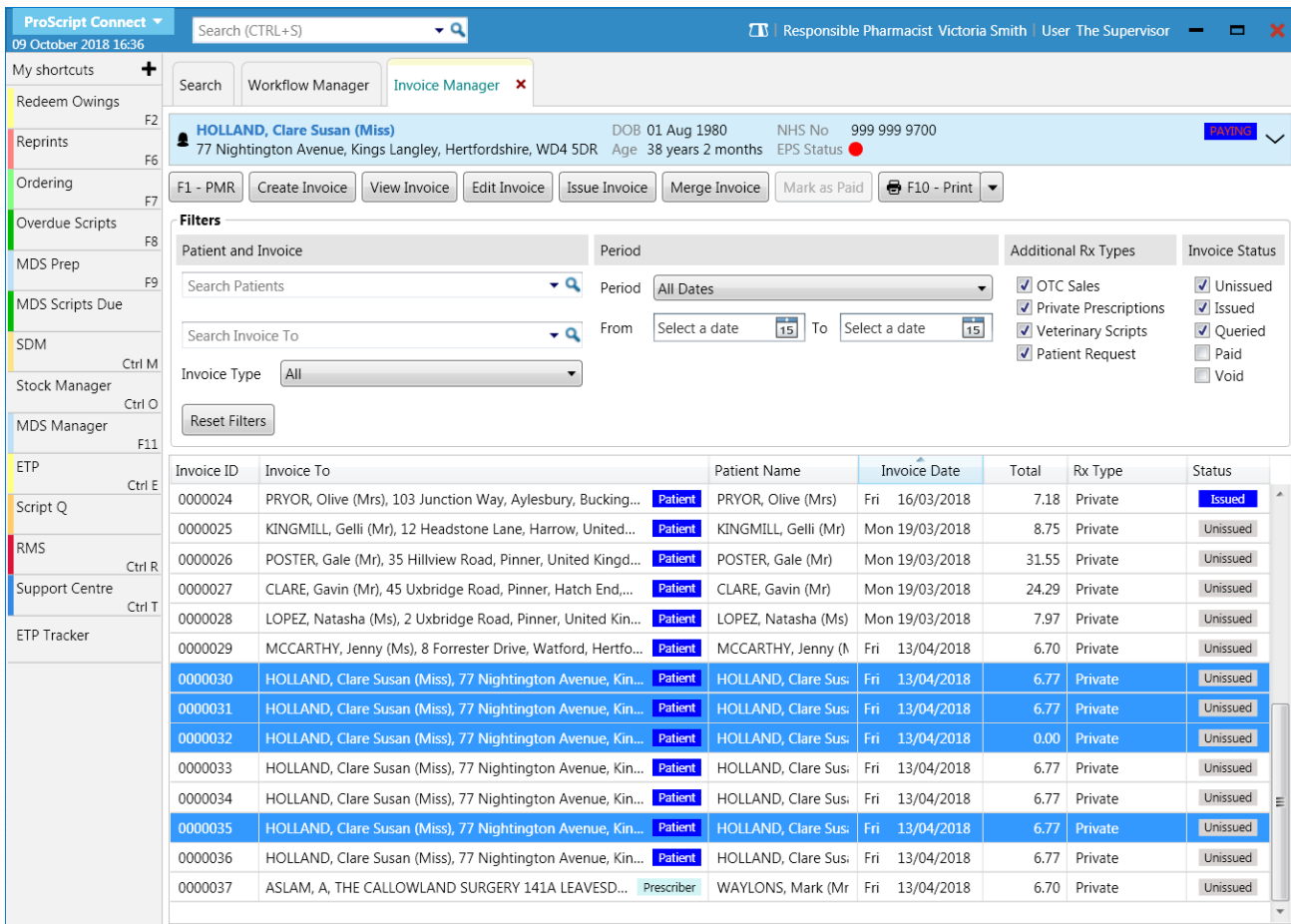


You can only merge two or more **Unissued** invoices which are of the same prescription type, and for the same patient.



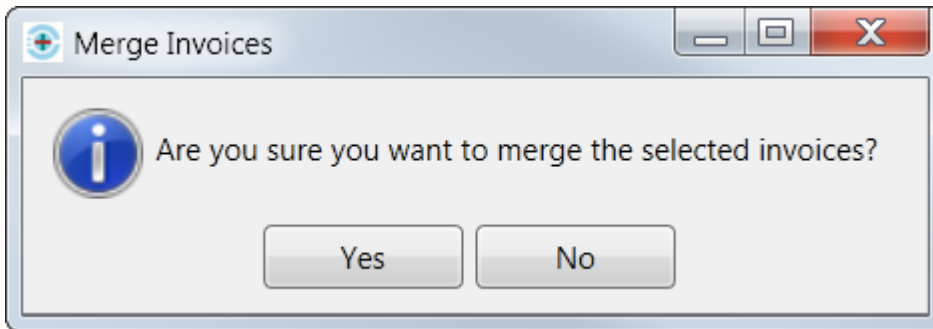
Merging **Patient** and **Prescriber** invoices will set the *Invoice To* field on the merged invoice as whichever, either patient or prescriber, was set to be invoiced on the original unmerged invoice that was clicked first when selecting invoices to be merged.

- 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.
- From the Invoice Manager, highlight the invoices in the grid you want to merge either by:
 - Using **[Ctrl+left-click]** to select scripts you want to merge one at a time and select the **[Merge Invoice]** button, or
 - Using **[Shift+left-click]** to highlight all consecutive scripts within your first and last click range for merging and select the **[Merge Invoice]** button

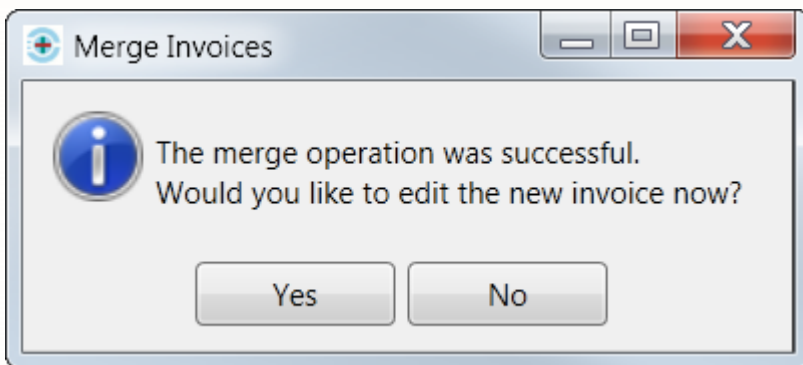


Invoice ID	Invoice To	Patient Name	Invoice Date	Total	Rx Type	Status
0000024	PRYOR, Olive (Mrs), 103 Junction Way, Aylesbury, Bucking...	PRYOR, Olive (Mrs)	Fri 16/03/2018	7.18	Private	Issued
0000025	KINGMILL, Gelli (Mr), 12 Headstone Lane, Harrow, United...	KINGMILL, Gelli (Mr)	Mon 19/03/2018	8.75	Private	Unissued
0000026	POSTER, Gale (Mr), 35 Hillview Road, Pinner, United Kingd...	POSTER, Gale (Mr)	Mon 19/03/2018	31.55	Private	Unissued
0000027	CLARE, Gavin (Mr), 45 Uxbridge Road, Pinner, Hatch End,...	CLARE, Gavin (Mr)	Mon 19/03/2018	24.29	Private	Unissued
0000028	LOPEZ, Natasha (Ms), 2 Uxbridge Road, Pinner, United Kin...	LOPEZ, Natasha (Ms)	Mon 19/03/2018	7.97	Private	Unissued
0000029	MCCARTHY, Jenny (Ms), 8 Forrester Drive, Watford, Hertfo...	MCCARTHY, Jenny (Ms)	Fri 13/04/2018	6.70	Private	Unissued
0000030	HOLLAND, Clare Susan (Miss), 77 Nightington Avenue, Kin...	HOLLAND, Clare Sus...	Fri 13/04/2018	6.77	Private	Unissued
0000031	HOLLAND, Clare Susan (Miss), 77 Nightington Avenue, Kin...	HOLLAND, Clare Sus...	Fri 13/04/2018	6.77	Private	Unissued
0000032	HOLLAND, Clare Susan (Miss), 77 Nightington Avenue, Kin...	HOLLAND, Clare Sus...	Fri 13/04/2018	0.00	Private	Unissued
0000033	HOLLAND, Clare Susan (Miss), 77 Nightington Avenue, Kin...	HOLLAND, Clare Sus...	Fri 13/04/2018	6.77	Private	Unissued
0000034	HOLLAND, Clare Susan (Miss), 77 Nightington Avenue, Kin...	HOLLAND, Clare Sus...	Fri 13/04/2018	6.77	Private	Unissued
0000035	HOLLAND, Clare Susan (Miss), 77 Nightington Avenue, Kin...	HOLLAND, Clare Sus...	Fri 13/04/2018	6.77	Private	Unissued
0000036	HOLLAND, Clare Susan (Miss), 77 Nightington Avenue, Kin...	HOLLAND, Clare Sus...	Fri 13/04/2018	6.77	Private	Unissued
0000037	ASLAM, A, THE CALLOWLAND SURGERY 141A LEAVESD...	WAYLONS, Mark (Mr)	Fri 13/04/2018	6.70	Private	Unissued

3. A pop-up window displays, asking whether you want to merge the selected invoices. Select the **[Yes]** button.



4. Another pop-up window displays, advising you that the merge operation was successful, and asking whether you want to edit the new invoice now. If you select the **[No]** button, the invoice preview will display and you will be returned to the Invoice Manager where your invoice is updated as **Issued**. To edit the invoice, or save it as **Unissued** select the **[Yes]** button.



5. The Edit Invoice form displays with all lines from the merged invoices. 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**.

Edit Invoice for patient HOLLAND, Clare Susan (Miss)

HOLLAND, Clare Susan (Miss) DOB 01 Aug 1980 NHS No 999 999 9700
 77 Nightington Avenue, Kings Langley, Hertfordshire, WD4 5DR Age 38 years 2 months EPS Status ●

Invoice To: HOLLAND, Clare Susan (Miss) (Patient)
 77 Nightington Avenue, Kings Langley, Hertfordshire, WD4 5DR

Additional Information: Status: Unissued, Tax Point Date: 13/04/2018, Payment Terms: 28 days, F7 - Discount: 0.00%, Delivery Charge: £ 0.00, Delivery VAT: £ 0.00

Note: F6 - Select Existing Note

Date	Prescribed Drug	Quantity	Price	VAT	Discount	Item Total
13/04/2018	Cerazette 75mcg tabs	28.00	6.77	0.00	0.00%	6.77
13/04/2018	Cerazette 75mcg tabs	28.00	6.77	0.00	0.00%	6.77
13/04/2018	Cerazette 75mcg tabs	28.00	0.00	0.00	0.00%	0.00
13/04/2018	Cerazette 75mcg tabs	28.00	6.77	0.00	0.00%	6.77

Invoice Total: £ 20.31

F8 - Preview Issue Invoice F10 - Save Close

6. Save your changes by selecting the **[F10 – Save]** button. The Invoice Manager displays, with the newly **Merged** invoice in the grid.

ProScript Connect 09 October 2018 16:40 Search (CTRL+S) Responsible Pharmacist Victoria Smith | User The Supervisor

My shortcuts: Redeem Owings (F2), Reprints (F6), Ordering (F7), Overdue Scripts (F8), MDS Prep (F9), MDS Scripts Due (F9), SDM (Ctrl M), Stock Manager (Ctrl O), MDS Manager (Ctrl O), ETP (Ctrl E), Script Q (Ctrl E), RMS (Ctrl R), Support Centre (Ctrl T), ETP Tracker

Search Workflow Manager Invoice Manager

HOLLAND, Clare Susan (Miss) DOB 01 Aug 1980 NHS No 999 999 9700
 77 Nightington Avenue, Kings Langley, Hertfordshire, WD4 5DR Age 38 years 2 months EPS Status ●

F1 - PMR Create Invoice View Invoice Edit Invoice Issue Invoice Unmerge Invoice Mark as Paid F10 - Print

Filters

Patient and Invoice	Period	Additional Rx Types	Invoice Status
Search Patients	Period: All Dates	<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 checked="" type="checkbox"/> Unissued <input checked="" type="checkbox"/> Issued <input type="checkbox"/> Queried <input type="checkbox"/> Paid <input type="checkbox"/> Void
Search Invoice To	From: Select a date To: Select a date		
Invoice Type: All			

Reset Filters

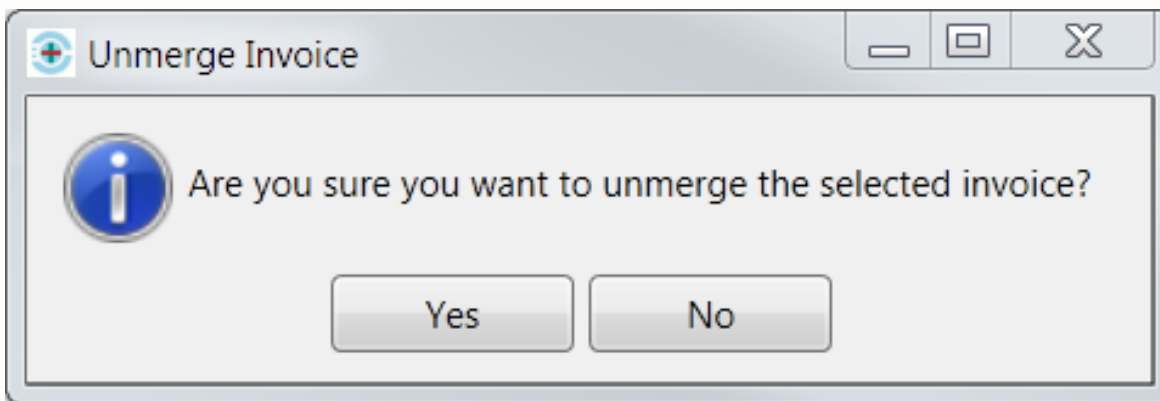
Invoice ID	Invoice To	Patient Name	Invoice Date	Total	Rx Type	Status
0000022	DARTON, Paul (Mr), 82 Junders Drive, North Watford, Hert...	DARTON, Paul (Mr)	Thu 25/01/2018	8.04	Invoice	Unissued
0000021	DARTON, Paul (Mr), 82 Junders Drive, North Watford, Hert...	DARTON, Paul (Mr)	Thu 25/01/2018	6.70	Invoice Hospice	Unissued
0000023	DARTON, Paul (Mr), 82 Junders Drive, North Watford, Hert...	DARTON, Paul (Mr)	Tue 30/01/2018	4.80	OTC	Issued
0000024	PRYOR, Olive (Mrs), 103 Junction Way, Aylesbury, Bucking...	PRYOR, Olive (Mrs)	Fri 16/03/2018	7.18	Private	Issued
0000025	KINGMILL, Gelli (Mr), 12 Headstone Lane, Harrow, United...	KINGMILL, Gelli (Mr)	Mon 19/03/2018	8.75	Private	Unissued
0000026	POSTER, Gale (Mr), 35 Hillview Road, Pinner, United Kingd...	POSTER, Gale (Mr)	Mon 19/03/2018	31.55	Private	Unissued
0000027	CLARE, Gavin (Mr), 45 Uxbridge Road, Pinner, Hatch End,...	CLARE, Gavin (Mr)	Mon 19/03/2018	24.29	Private	Unissued
0000028	LOPEZ, Natasha (Ms), 2 Uxbridge Road, Pinner, United Kin...	LOPEZ, Natasha (Ms)	Mon 19/03/2018	7.97	Private	Unissued
0000029	MCCARTHY, Jenny (Ms), 8 Forrester Drive, Watford, Hertfo...	MCCARTHY, Jenny (Ms)	Fri 13/04/2018	6.70	Private	Unissued
0000030	HOLLAND, Clare Susan (Miss), 77 Nightington Av... Merged	HOLLAND, Clare Sus...	Fri 13/04/2018	20.31	Private	Unissued
0000033	HOLLAND, Clare Susan (Miss), 77 Nightington Avenue, Kin...	HOLLAND, Clare Sus...	Fri 13/04/2018	6.77	Private	Unissued
0000034	HOLLAND, Clare Susan (Miss), 77 Nightington Avenue, Kin...	HOLLAND, Clare Sus...	Fri 13/04/2018	6.77	Private	Unissued
0000036	HOLLAND, Clare Susan (Miss), 77 Nightington Avenue, Kin...	HOLLAND, Clare Sus...	Fri 13/04/2018	6.77	Private	Unissued
0000037	ASLAM, A, THE CALLOWLAND SURGERY 141A LEAVESD...	WAYLONS, Mark (Mr)	Fri 13/04/2018	6.70	Private	Unissued

Unmerging Invoices



You cannot bulk unmerge invoices. Each merged invoice must be unmerged one at a time.

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 marked as **Merged** and select the **[Unmerge Invoice]** button.
3. A pop-up window displays, asking you to confirm whether you want to unmerge the selected invoice. Select the **[Yes]** button.



4. The invoices will be unmerged and display in the Invoice Manager grid.



If you merged **Patient** and **Prescriber** invoices, your merged invoice *Invoice To* field would be whichever – either patient or prescriber – was set to be invoiced on the original unmerged invoice that was clicked first when selecting the invoices to be merged. Once unmerged, the individual invoices will display with the original invoice details as set before the merge.

ProScript Connect | Search (CTRL+S) | Responsible Pharmacist Victoria Smith | User The Supervisor

09 October 2018 16:36

My shortcuts: Redeem Owings, Reprints, Ordering, Overdue Scripts, MDS Prep, MDS Scripts Due, SDM, Stock Manager, MDS Manager, ETP, Script Q, RMS, Support Centre, ETP Tracker

Search | Workflow Manager | Invoice Manager

HOLLAND, Clare Susan (Miss) | DOB 01 Aug 1980 | NHS No 999 999 9700 | Age 38 years 2 months | EPS Status

77 Nightington Avenue, Kings Langley, Hertfordshire, WD4 5DR

F1 - PMR | Create Invoice | View Invoice | Edit Invoice | Issue Invoice | Merge Invoice | Mark as Paid | F10 - Print

Filters

Patient and Invoice: Search Patients, Search Invoice To, Invoice Type: All

Period: All Dates | From: Select a date | To: Select a date

Additional Rx Types: OTC Sales, Private Prescriptions, Veterinary Scripts, Patient Request

Invoice Status: Unissued, Issued, Queried, Paid, Void

Invoice ID	Invoice To	Patient Name	Invoice Date	Total	Rx Type	Status
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0000028	LOPEZ, Natasha (Ms), 2 Uxbridge Road, Pinner, United Kin...	LOPEZ, Natasha (Ms)	Mon 19/03/2018	7.97	Private	Unissued
0000029	MCCARTHY, Jenny (Ms), 8 Forrester Drive, Watford, Hertfo...	MCCARTHY, Jenny (M)	Fri 13/04/2018	6.70	Private	Unissued
0000030	HOLLAND, Clare Susan (Miss), 77 Nightington Avenue, Kin...	HOLLAND, Clare Sus...	Fri 13/04/2018	6.77	Private	Unissued
0000031	HOLLAND, Clare Susan (Miss), 77 Nightington Avenue, Kin...	HOLLAND, Clare Sus...	Fri 13/04/2018	6.77	Private	Unissued
0000032	HOLLAND, Clare Susan (Miss), 77 Nightington Avenue, Kin...	HOLLAND, Clare Sus...	Fri 13/04/2018	0.00	Private	Unissued
0000033	HOLLAND, Clare Susan (Miss), 77 Nightington Avenue, Kin...	HOLLAND, Clare Sus...	Fri 13/04/2018	6.77	Private	Unissued
0000034	HOLLAND, Clare Susan (Miss), 77 Nightington Avenue, Kin...	HOLLAND, Clare Sus...	Fri 13/04/2018	6.77	Private	Unissued
0000035	HOLLAND, Clare Susan (Miss), 77 Nightington Avenue, Kin...	HOLLAND, Clare Sus...	Fri 13/04/2018	6.77	Private	Unissued
0000036	HOLLAND, Clare Susan (Miss), 77 Nightington Avenue, Kin...	HOLLAND, Clare Sus...	Fri 13/04/2018	6.77	Private	Unissued
0000037	ASLAM, A, THE CALLOWLAND SURGERY 141A LEAVESD...	WAYLONS, Mark (Mr)	Fri 13/04/2018	6.70	Private	Unissued

Revision History

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

Contact us

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