

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.

- 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 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

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F6	77 Nighti	ngton Avenue, Kings Langley, Hertfordshire, WD4 5D	R Age 38 years 2	2 months EPS Status				•
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ETP	Invoice ID	Invoice To		Patient Name	Invoice Date	Total	Rx Type	Status
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D. LC	0000025	KINGMILL, Gelli (Mr), 12 Headstone Lane, Harrow, U	Jnited Patient	KINGMILL, Gelli (Mr)	Mon 19/03/2018	8.75	Private	Unissued
KIVIS Ctrl R	0000026	POSTER, Gale (Mr), 35 Hillview Road, Pinner, United	Kingd Patient	POSTER, Gale (Mr)	Mon 19/03/2018	31.55	Private	Unissued
Support Centre	0000027	CLARE, Gavin (Mr), 45 Uxbridge Road, Pinner, Hatch	End, Patient	CLARE, Gavin (Mr)	Mon 19/03/2018	24.29	Private	Unissued
ETD Tracker	0000028	LOPEZ, Natasha (Ms), 2 Uxbridge Road, Pinner, Unit	ed Kin Patient	LOPEZ, Natasha (Ms)	Mon 19/03/2018	7.97	Private	Unissued
	0000029	MCCARTHY, Jenny (Ms), 8 Forrester Drive, Watford,	Hertfo Patient	MCCARTHY, Jenny (N	Fri 13/04/2018	6.70	Private	Unissued
	0000030	HOLLAND, Clare Susan (Miss), 77 Nightington Aven	ue, Kin Patient	HOLLAND, Clare Susi	Fri 13/04/2018	6.77	Private	Unissued
	0000031	HOLLAND, Clare Susan (Miss), 77 Nightington Aven	ue, Kin Patient	HOLLAND, Clare Susi	Fri 13/04/2018	6.77	Private	Unissued
	0000032	HOLLAND, Clare Susan (Miss), 77 Nightington Aven	ue, Kin Patient	HOLLAND, Clare Susi	Fri 13/04/2018	0.00	Private	Unissued
	0000033	HOLLAND, Clare Susan (Miss), 77 Nightington Aven	ue, Kin Patient	HOLLAND, Clare Susi	Fri 13/04/2018	6.77	Private	Unissued
	0000034	HOLLAND, Clare Susan (Miss), 77 Nightington Aven	ue, Kin Patient	HOLLAND, Clare Susi	Fri 13/04/2018	6.77	Private	Unissued 📃
	0000035	HOLLAND, Clare Susan (Miss), 77 Nightington Aven	ue, Kin Patient	HOLLAND, Clare Sus	Fri 13/04/2018	6.77	Private	Unissued
	0000036	HOLLAND, Clare Susan (Miss), 77 Nightington Aven	ue, Kin Patient	HOLLAND, Clare Susi	Fri 13/04/2018	6.77	Private	Unissued
	0000037	ASLAM, A, THE CALLOWLAND SURGERY 141A LEAV	/ESD Prescriber	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 <u>Issued</u>. To edit the invoice, or save it as <u>Unissued</u> select the [Yes] button.

Merge Invoices	x
The merge operation was successful. Would you like to edit the new invoice not	N?
Yes No	

- 5. The Edit Invoice form displays with all lines from the merged invoices. From here you can:
 - o 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.

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Edit Invoice for patient HOLLAND, Clare Susan (Miss)				-	- x
HOLLAND, Clare Susan (Miss) 77 Nightington Avenue, Kings Langley, Hertfords	DOB 01 Aug 1980 NHS No hire, WD4 5DR Age 38 years 2 months EPS Sta	lo 999 999 9 atus 🛑	700			~
Invoice To	Additional Information Note	Note				
HOLLAND, Clare Susan (Miss) (Patient)	Status Unissued					
77 Nightington Avenue	Tax Point Date 13/04/2018 15					
Kings Langley Hertfordshire	Payment Terms 28 days					
WD4 5DR	F7 - Discount 0.00 %					
	Delivery Charge £ 0.00			_		
	Delivery VAT £ 0.00			F6	5 - Select Ex	isting Note
Add Item Delete Item Edit Price						
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
◯ VAT Added Sono VAT				Invoice	Total: £	20.31
F8 - Preview Issue Invoice				 Image: A start of the start of	F10 - Save	X Close

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

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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.

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ProScript Connect ▼ 09 October 2018 16:36	Search (C	CTRL+S) – Q		🔳 Responsible	Pharmacist Victoria S	mith Use	r The Supervisor	– – ×
My shortcuts 🕂	Grant							
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Ordering F7	F1 - PMR	Create Invoice View Invoice Edit Invoice Issu	e Invoice Merge	e Invoice Mark as Pai	d 🖶 F10 - Print 💌			
Overdue Scripts	Filters							
MDS Prep	Patient and	Invoice	Period			Addition	al Rx Types	Invoice Status
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ETP	Invoice ID	Invoice To		Patient Name	Invoice Date	Total	Rx Type	Status
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	0000031	HOLLAND, Clare Susan (Miss), 77 Nightington Aven	ue, Kin Patient	HOLLAND, Clare Sus	Fri 13/04/2018	6.77	Private	Unissued
	0000032	HOLLAND, Clare Susan (Miss), 77 Nightington Aven	ue, Kin Patient	HOLLAND, Clare Sus	Fri 13/04/2018	0.00	Private	Unissued
	0000033	HOLLAND, Clare Susan (Miss), 77 Nightington Aven	ue, Kin Patient	HOLLAND, Clare Sus;	Fri 13/04/2018	6.77	Private	Unissued
	0000034	HOLLAND, Clare Susan (Miss), 77 Nightington Aven	ue, Kin Patient	HOLLAND, Clare Susi	Fri 13/04/2018	6.77	Private	Unissued =
	0000035	HOLLAND, Clare Susan (Miss), 77 Nightington Aven	ue, Kin Patient	HOLLAND, Clare Susi	Fri 13/04/2018	6.77	Private	Unissued
	0000036	HOLLAND, Clare Susan (Miss), 77 Nightington Aven	ue, Kin Patient	HOLLAND, Clare Susi	Fri 13/04/2018	6.77	Private	Unissued
	0000037	ASLAM, A, THE CALLOWLAND SURGERY 141A LEAV	ESD Prescriber	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

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