INVOICING

Danny Reyes
Guy Gooselaw
Brandy Bosnjak

1

OVERVIEW

▶ Dropship Invoices

▶ Reprint Invoices from List

▶ Reprint Ship-To Invoice

▶ Email and Batch Printing

▶ Emailed Stock Credits

▶ Obscuring Patient Names

▶ PDF Invoices

▶ Alternative Invoice Label

2

Dropship Invoices

- Allows producing lab to dropship jobs using custom invoice form from sending lab.
- Prerequisite setup prior to transmitting dropship jobs
- Sending Lab:
  - Export INVCUST from form editor: (5,4,1) Form > Export Custom Invoice
  - Save file to a location of choice
  - Send zip file to drop-ship lab (ex. Email)
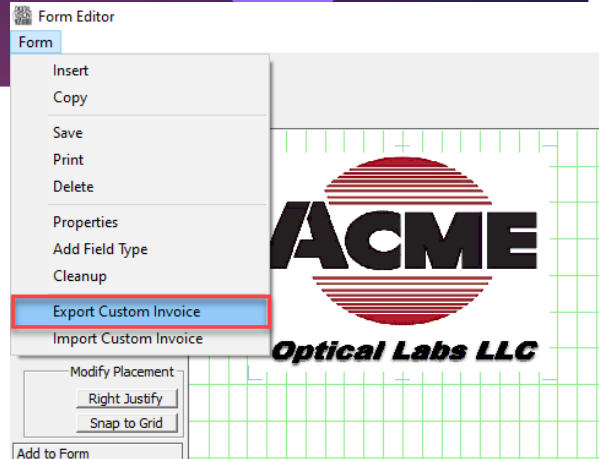
3

Dropship Invoices (cont.)

- Receiving Lab:
  - Import Custom Invoice within Form Editor
  - Specify Sending Lab's Account when prompted
  - New Folder is created in \vision\forms directory named by account #
  - Contains custom XML form and logo
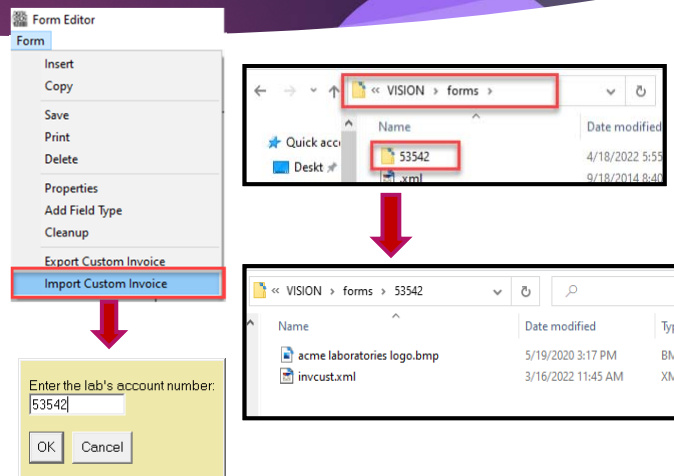
4

PDF Invoice Features - Setup (WSR)

▶ **Require all types of invoice forms be enabled for customizable editing**
- ▶ System Setup (4,8,1,1)
  - ▶ Rx Invoice and Rx Credit – F2:Rx Invoicing
  - ▶ Stock Invoice – F4:Stock Invoicing

5

Reprint Invoices from List

▶ Uses a list file located in: i:\sandbox\invoicelist.txt

▶ List can be created with an Archive Report - must be saved and renamed to path above

▶ Two columns required in following order:
- ▶ INVNUM
- ▶ SHIPDATE (mm/dd/yy)

▶ Outputs separate pdf's for Rx's, Credits/Adjustments, and Stock

6

## Option to Re-Print Ship-To Invoice with No Money

- ▶ The selected invoice must meet the following conditions for this option to be presented:
  - ▶ The bill-to account is different from the ship-to account
  - ▶ The bill-to account applied a service code with rx-function 522 (no prices printed)
- ▶ If above conditions are met, option will be given to reprint with or without dollars
- ▶ Available only for a single invoice
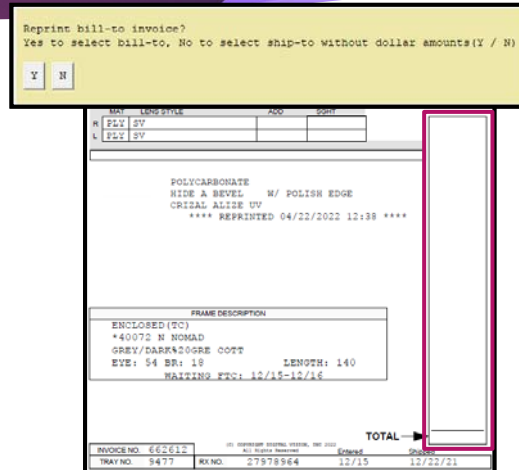
7

Batch Print Invoices to PDF (WSR)

- ▶ Print Bill-to Account invoices from work in process for a date range or previous month
  - ▶ Proceed message
    - ▶ with count
  - ▶ Batch together all found Stock, Credit and Rx invoices producing a maximum of 3 pdf documents to print
  - ▶ PDF named based on the first invoice number it encounters and the type of invoice
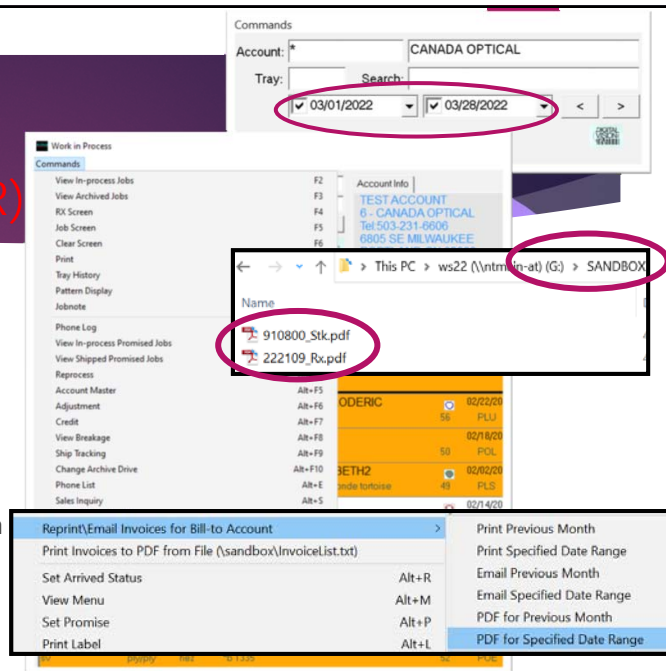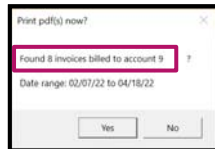
8

Emailing PDF Invoices - Setup (WSR)

- Customized Rx, Stock and Credit invoices enabled (4,8,1,1)
- Account setup for emailed-pdf communication
- Emailed to Bill-To account '@W' or '@A' email recipients from Work-in-Process Phone Record

9

Emailing PDF Invoices (WSR)

- Choose date range OR previous month
- Command->Reprint\Email Invoices for Bill-to Account
  - Program will search archive for all Stock, Rx and Credit invoices and will attach each to a separate email
- Choose specific invoice from archive to email or view from archive in pdf form

10

Email Stock Credit PDF - Setup

- Account requirements:
  - Setup for emailed PDF communications
  - Credit-notice recipient specified '@C' or '@A'
- System setup requirements (4,8,1,1):
  - Customized stock ticket enabled
  - Email/fax credits enabled F8:Invoice Printing

11

Email Stock Credit PDF

- Stock Order Processing
- Set 'EmailCr' to 'Y'
- F12: To issue credit and send email

12

Obscure Patient Names

▶ Standardized setup for worktickets, invoices and delay notices, and mega transfer file in 'System Setup'

▶ Choose number of characters to print

13

Generate PDF's For All Invoices

▶ Enable in DVI Setup (4,8,1,1) > F2:RX Invoicing tab

▶ Creates pdf invoice copy upon shipping to '\VISION\invoices'

▶ File naming convention:
  ▶ Billto_shipto_Inv.pdf

▶ Labs can post these elsewhere for viewing by ECPs

14

Alternative Company Invoice

- For when lab has multiple business entities or brands
- In (5,4,1 - Invoice) Copy invcust to inv_XX where 'XX' is a unique identifier for alternate company. This will be the base for the new invoice. EN is the example
- First 8 characters are reserved for the form name before description.
- Create a "EN" service code – with Rx-Function 527
- Once created add service code to the customer master (3,4,1) of accounts that will be getting the alternate company invoice.

15

Copying Forms – The Correct Way

- ▶ Only use the copy function inside the Form Editor (5,4,1)> Form > Copy

- ▶ Copying xml form files outside of DVI, through Windows, results in an incorrect copy

16

Thank You

17