

# INVOICING

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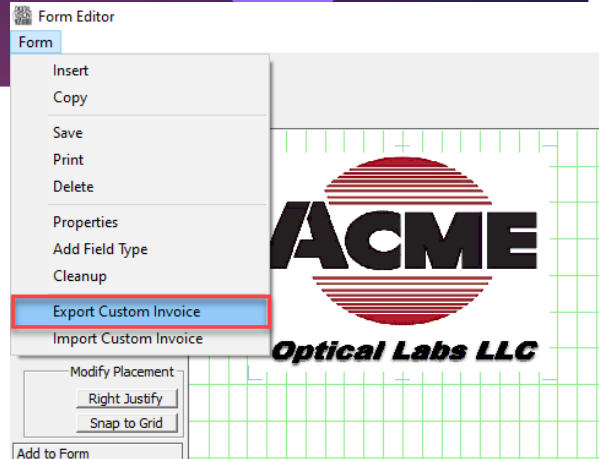
## OVERVIEW

- ▶ 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

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## Dropship Invoices

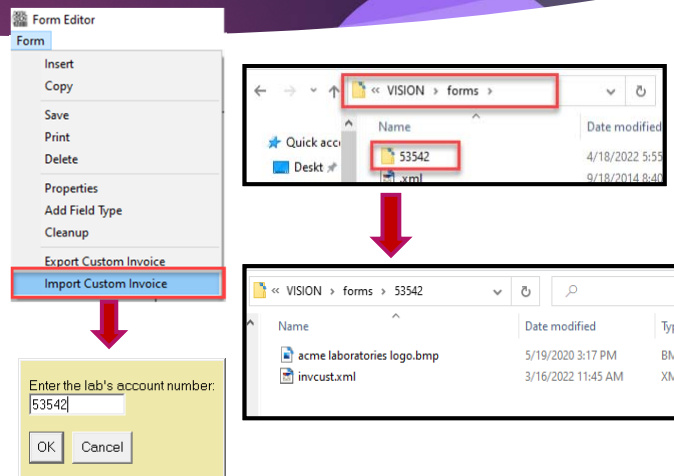
- ▶ Allows producing lab to dropship jobs using custom invoice form from sending lab.
- ▶ Prerequisite setup prior to transmitting dropship jobs
- ▶ Sending Lab:
  - ▶ Export INVCUST from form editor: (5,4,1) Form > Export Custom Invoice
  - ▶ Save file to a location of choice
  - ▶ Send zip file to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



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## 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



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## 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

The screenshot shows a search for 'customizable' in a system setup window. Below the search are two tables of settings. The first table, 'F2:RX Invoicing', lists various settings like 'Base Lens Pricing' (M), 'Net Discounted Invoices' (N), 'Credit Limit' (Y), etc., with 'Customizable Invoice' and 'Customizable RxCredit' both set to 'Y'. The second table, 'F4:Stock Invoicing', lists settings like 'Description11' through 'Description20', 'Keep Back Orders' (Y), 'Days To Keep BOs' (999), etc., with 'Customizable Stock Ticket' set to 'Y'.

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## 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

The screenshot shows a Notepad window titled 'InvoiceList.txt - Notepad' with the following content:
 

```

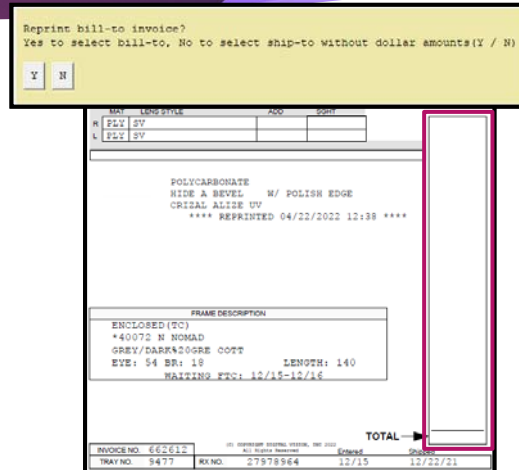
        INVNO  SHIPDATE
        842627  12/17/20
        845119  12/19/20
        887493  01/15/21
        
```

 To the right is a 'Work in Process' menu with various commands. The command 'Print Invoices to PDF from File (i:\sandbox\InvoiceList.txt)' is highlighted in blue.

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

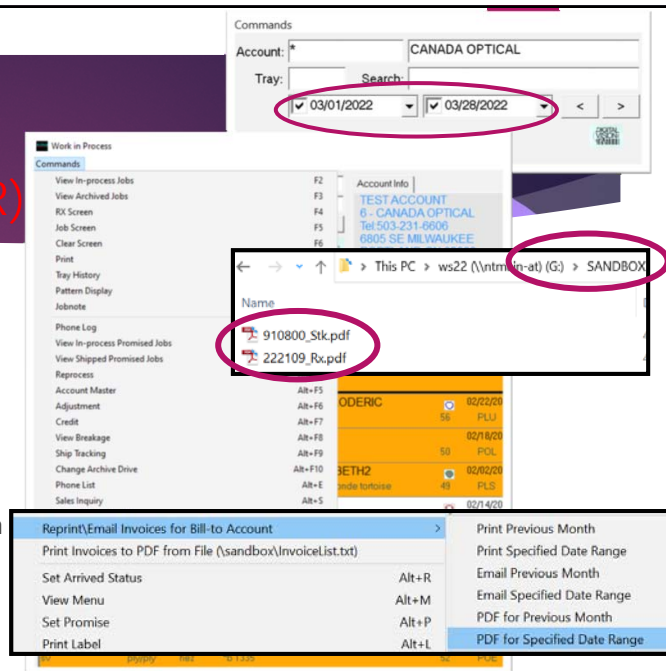
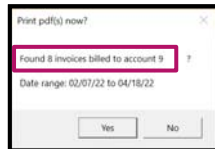
- ▶ The selected invoice must meet the following conditions for this option to be presented:
  - ▶ The bill-to account is different from the ship-to account
  - ▶ The bill-to account applied a service code with rx-function 522 (no prices printed)
- ▶ If above conditions are met, option will be given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



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# 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



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# 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

Account Master

Number: [ ] Name: DELAWARE OPTICAL

Title: [ ] Address: 6805 SE MILWAUKEE

City: PORTLAND State: DE Zip: 02888 Cour: [ ]

Phone: 503-231-6606 Fax: 503-231-4943 Commer: [ ]

Billing Status: [ ] Bill To: [ ] Group: [ ] Fin. Charge: [ ]

Printing: [E] Buy Group: [ ] Oversize: [ ] Open Item: [N] 3rd party: [N]

RX Pricelists: [ ] Stock Pricelists: [ ] Default Job Type: [ ] Web Account: [Y]

Regular: [ ] Lens: [ ] Stop Service: [N]

Frame: [ ] Misc: [ ]

Uncut: [ ]

**Comm Setup (Email)**

Communications Options

WIP/Delay/Credit

Communication Options

File

**Email PDF**

Email HTML

No Communication

Legacy Options

File Only

Print Only

Phone List Records

Account#	Name	Target1	Address1
9	DVI TEST	@WA	TEST@THEDVI.COM

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# 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

Account Master

Account: CANADA OPTICAL

Tray: [ ] Search: [ ]

03/01/2022 03/28/2022

Work in Process

Account Info

259 - MISSOURI OPTICAL

Tel 503-231-6606

6805 SE MILWAUKEE

PORTLAND MO 05701

U06

PLIST VS (INSURANCE 11)

Process	AMF3 Promised Shipped	F12 Search	Last Search
52	POD	gd	to come
53	POD	gd	to come
52	POE	gd	enclosed

Reprint\Email Invoices for Bill-to Account

Print Invoices to PDF from File (%sandbox\InvoiceList.txt)

Set Arrived Status Alt+R

View Menu Alt+M

Set Promise Alt+P

Print Label Alt+L

Print Previous Month

Print Specified Date Range

Email Previous Month

**Email Specified Date Range**

PDF for Previous Month

PDF for Specified Date Range

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## Email Stock Credit PDF - Setup

- Account requirements:
  - Setup for emailed PDF communications
  - Credit-notice recipient specified '@C' or '@A'

Account Name: DELAWARE OPTICAL  
 Address: 6805 SE MILWAUKEE  
 City: PORTLAND State: DE Zip: 02888  
 Phone: 503-231-6606 Fax: 503-231-4943

Communications Options:  
 WIP/Delay/Credit:  
 Communication Options:  
 Email PDF  
 Email HTML  
 No Communication  
 Legacy Options  
 File Only  
 Print Only

Comm Setup (Email):

Name	Value	Description
Use 8.5 x 11 Paper	N	Y/Use 8.5 x 11 Paper
Print Base Curve	Y	Y/Always print base curve
Print Tax	N	Y/Print tax
Tax Heading	N	Message to printer
Print Discount	N	Y/Print discount
Print Postage	H	Y/Print postage
Postage Heading	N	Message to printer
Number of Invoice Copies	1	The number of copies to print
Number of Credit Copies	0	The number of copies to print
Date and Time Line	50	Line on the invoice
4-character Tray Field	N	Y/Use 4-character tray field
Default Name	F	Y/Use default name
Invoice Number Barcode	N	Y/Print invoice number barcode
Alternate Invoice	N	Y/Print alternate invoice
Normalize Tax	N	Y/Show tax normalized
Invoice LPT Port	N	System LPT
Credit LPT Port	N	System LPT
Date/Time 1	E	(Blank)Date
Date/Time 1 Column	33	Column to print
Date/Time 2	S	(Blank)Date
Date/Time 2 Column	47	Column to print
Date/Time 3	S	(Blank)Date
Date/Time 3 Column	47	Column to print
Use Dynamic Bios	Y	Y/Use dynamic bios
Printer name for bios	N	Y/Use printer name for bios
Email/Fax Delay Notices and Credits	Y	Y/Email/Fax delay notices and credits

Phone List Records:

Account#	Name	Target1
9	DVI TEST	@C

- System setup requirements (4,8,1,1):
  - Customized stock ticket enabled
  - Email/fax credits enabled
  - F8:Invoice Printing

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## Email Stock Credit PDF

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

Stock Order Invoicing

Acct# 1 Acct Name ALASKA OPTICAL Invoice# Entry: 03/24/22  
 RInv# OP: @ 4:10PM

Tray BillTo Contact Route Services

Reference Postage Tbl Pl Msc Frm 6805 SE MILWAUKEE  
 TEST 1.11 PC: PORTLAND  
 MS MISC. Tax % EmailCr: Y AK 04330  
 Invoice message 503-231-6606  
 INACTIVE ACCOUNT

Items:0 Lines:0 Pages:0 Navigate:Alt-Up,Alt-Down  
 AF2:Reconcile AF8:More CTL-F10:Chob F10:Debit F12:Credit  
 F3:Edit ADD F4:Misc F5:Frame F6:Lens F7:Note F8:Money F9:Recch

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# Obscure Patient Names

The image shows two overlapping system setup windows. The background window is titled 'Field Description: Number of characters of patient name to print in mega transfer file'. The foreground window is titled 'Number of characters of patient name to print on workticket Invoice and screen are unaffected Valid Choices: 01234 56789'. Both windows show a list of system options with checkboxes and values. Key options include 'F2:RX Invoicing', 'F3:RX Processing', 'F5:Cycling', and 'F6:Packing List'. A 'Generate PDFs' option is highlighted in blue. To the right, a preview of a workticket is shown with a patient name '9477 259 13701\*\*\*\*\*' and a date '03/24/22 03:59P'. Below the preview is a diagram of an eyeglass frame.

- ▶ Standardized setup for worktickets, invoices and delay notices, and mega transfer file in 'System Setup'
- ▶ Choose number of characters to print

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# Generate PDF's For All Invoices

The image shows two overlapping system setup windows. The background window is titled 'Alt+F1: Lens Inventory', 'Alt+F2: Inventory Indicators', 'Alt+F3: Frame Inventory', and 'Alt+F4: Invoicing'. The foreground window is titled 'F2:RX Invoicing' and shows a list of options with checkboxes and values. Key options include 'Generate PDFs' (checked), 'Email/Fax Delay Notice...', and 'Generate PDFs'. To the right, a screenshot of a file explorer window shows a folder named 'VISION > invoices' containing three PDF files: '103242\_103242\_164813.pdf', '103242\_103242\_164828.pdf', and '103242\_103242\_100994.pdf'. Below the screenshots are three bullet points explaining the setup.

- ▶ 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

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## 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.

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## 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

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