CHAPTER 9: CLIENT INVOICE

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Post Charges to the Client’s Account

Once the treatments performed and/or inventory items dispensed to the patient have been entered into the Medical History Area of the CID, these services/items will appear in blue and should be posted to the client’s account. A new invoice will be opened with the charges listed and an opportunity to collect payment given.

- From the CID of the correct client, right-click and from the shortcut menu click Post to display the Posting Charges window.

- To post charges for only the current selected patient, select the current patient only box or left-click on the patients names to uncheck and prevent their charges from being posted.

- Click Post to display the Enter payment window.
Choose not to print the client invoice
You may post charges to the client’s account record without taking a payment or printing an invoice.

- Select the Open Invoice option.

Temporarily change the posting date

- Using the drop-down calendar, select the correct posting date.

Change the posting date for several invoices

- There may be times when you need to input some amount of data for some date in the past or future. You may do this by choosing the Utilities menu and selecting Posting Date. Use the drop-down calendar to set the date and click Continue.

Enter a Payment

After the charges have been posted, the Enter payment window will be displayed.

- Use the Type drop-down menu to select the payment type.
- When a check payment is selected, type the check number in the Ref # field.
- If a Held check payment type is selected, use the drop-down calendar and select the date of Deposit.
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- If necessary, enter/change the Amount.
- If appropriate, type the initials of the person entering the invoice information in the Entered by field.
- Click Done to display the Invoice window.

Make change
If the payment is by cash or for some other reason the customer makes a payment greater than the amount owed, AVImark allows you to make change using the Change maker.

- Click Continue to make change for the client. The change will be entered in the accounting window as a Cash refund.
- Click Cancel to Apply to the Balance.

To learn more about:
- Posting charges
- Enter payments
- Posting date

Search the Help for:
- Post Charges
- Enter Payments; Enter payment window
- Utilities menu

Use a Cash Drawer
With the cash drawer installed and a serial port assigned to it, AVImark will open the drawer when a payment is added. AVImark will open most computer-driven cash drawers that are attached to the computer via the system COM1 or COM2 serial ports. AVImark has been tested with the serial interface cash drawer sold by the M-S Cash Drawer Corp. of Pasadena, CA.
Display and Print an Invoice/Receipt

Once treatments have been performed on the patient(s) belonging to the client, these charges are posted to the client's account record, and an invoice/receipt printed.

Modify the invoice

- From the Invoice window, right-click and from the shortcut menu click Change to display the Change Transaction window.
- To remove an entry, right-click and from the shortcut menu click Remove. You will need to Click OK to confirm the removal.
- Specify the number of copies of the invoice you want printed if different then the default setting.
- Select Include notes if there are any medical history notes to be included on the invoice.
- Click Print or to preview the invoice onscreen, select Preview and click Print.

Use a calculator

You may display and use a calculator tool from within the Invoice window.

- On the Tools menu, click Calculator to open and close the calculator.

Reprint an Invoice

You may reprint an invoice if needed.
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- From the Client’s Account window, select the invoice you wish to reprint.
- Right-click and from the shortcut menu click **Reprint**.

**Return an Item**

- Enter the item to be returned into medical history using a negative quantity.
- Right-click and from the shortcut menu click **Post** to display the Posting Charges window.
- Click **Post** on the Posting Charges window to display the invoice.
- Right-click to display the shortcut menu. Point to **New** and select the refund payment type.
- Enter a negative amount in the Amount field and click **Done**.

**Accept Payments with X-Charge®**

You may enter credit card transactions directly through AVImark by using X-Charge®, Integrated Credit Card Processing. With the X-Charge® software installed, an X-Charge® window will be displayed each time a credit card payment is selected from the New Transaction screen. The information required in this window can be manually entered or automatically entered by swiping the card. Once the transaction has been authorized, the normal AVImark invoice will print and contain a statement confirming the client has agreed to pay the amount. Following the statement, a signature line will appear for the client to sign.

**Capturing signatures for credit card payments**

As of version 175, a digital signature capture devise (HHP TT3101) can be used to capture the client’s signature and store it in AVImark. Another signature capture device is the Topaz T-LBK462-HSB. A digital signature can be accepted from the client, printed on the detailed AVImark invoice, and stored within AVImark for future reference.

- From the New Transaction window, select the appropriate credit/debit card payment and click **Done** to display the X-Charge® window.

- Swipe the card or type the credit card number in the **Card No.** field.
- Select **Credit Card** to display an area for the client to sign and accept the signature.
- From the X-Charge® processing window click **Done**.
Debit Card payments

- Swipe the card or enter the debit card number in the Card No. field.
- Select Debit Card to display the number pad on the HHP TT3101 devise for the client to enter the debit PIN.
- From the X-Charge® processing window click Done.

Accept Payments with MPS (McAllister Payment Solutions®)

McAllister Payment Solutions is a secure credit card processing system and has worked hard to ensure that all aspects of the MPS credit card processing features are PA-DSS compliant. Credit card numbers should not be stored in a client note field and if you have done this in the past please contact Technical Support for assistance in properly removing these numbers.

Processing a Credit Card

McAllister Payment Solutions offers credit and debit card processing services, fully integrated into your AVImark system. The MPS processing services will provide an online reporting tool allowing you to review your transaction volumes at any time.

- From the New Transaction window, select the appropriate credit/debit card payment and click Done to display the McAllister Payment Solutions window.
- Swipe the credit card.
- If it is necessary to hand-key a card, selecting the Hand Key button will display an additional window allowing the user to enter the appropriate information.
- Swiping a card will immediately begin the card processing. Once the card is processed, you will be returned to the main Invoice window where a detailed invoice can be printed for the client and a duplicate can be printed for the client’s signature which will be stored at the clinic.

Printing Signature Slip Receipts

A small ticker-tape receipt can be printed to a Dymo® LabelWriter. This signature slip-receipt can be activated by setting the Hospital Setup…Advanced Option Print Signature Slip on Credit Care Transactions to True. When a credit card transaction is added to an invoice and processed through MPS, the signature slip-receipt will be automatically printed when the card processing is complete and you are returned to the main invoice window. You can then select to print the regular invoice that will be given to the client.

When adding and processing a credit card transaction that is not part of an invoice, a message will be displayed asking if an invoice is needed for this transaction. The signature slip-receipt will print immediately following the response selected for this message. AVImark’s recommended label printers can be used to print this signature slip-receipt. The printer used to print the signature slip-receipt can be selected within Utilities…Printer Setup…Receipt.

The dimensions used for the signature slip-receipt paper cannot be modified at this time. The appropriate size of this continuous feed paper can be viewed and/or purchased through Veterinary Wholesale Supplies. This receipt paper can be used with the AVImark recommended Dymo® printers. Please visit www.veterinarywholesalesupply.com to purchase the continuous feed receipt paper for your Dymo® printer.

Paperless Credit Card Signatures

It is possible to have paperless credit card signature receipts through MPS by accepting digital signatures from your clients. Using a Topaz T-LBK462-HSB signature capture device, a digital signature can be accepted from the client, printed on the detailed AVImark invoice, and stored within AVImark for future reference. Having a digital signature stored which can be accessed at any time prevents any type of paper-trail for credit card transactions.
Setting the Advanced Option, Enable the Topaz Signature Capture Device, to **True** will allow a signature to be prompted for once a card has been swiped or hand-keyed.

Once the client has authorized the transaction with their signature, the processing will be completed. This signature will be saved by client within a sub-folder of the AVImark directory named Signature.

**Transfer Invoices**

When transferring invoices from one client to another the entire invoice can be transferred or just the invoice total.

- From the original clients accounting window highlight the invoice that needs to be transferred.
- From the right-click shortcut menu select **Transfer**.
- Enter the client account number the invoice is being transferred to.
- Select **Adjustments Only** to transfer only the balances of the invoice as an account adjustment.
- Click **Done** to transfer the invoice balance.

**OR**

- From the original clients accounting window highlight the invoice that needs to be transferred.
- From the right-click shortcut menu select **Transfer**.
- Enter the client account number the invoice is being transferred to.
- Select **Move Entries** to move all transactions associated to the selected invoice.
- To maintain the original patient name when the invoice is move to another client select **Hold Patient Name**.
- The option **Clear Patient Name** allows the accounting entries to be moved to the new client without having them assigned to a particular patient.
- Selecting the **Retrieve Patient Name** option will allow the Medical History entries associated to the invoice line-items to be searched and discovered. Once these associated entries are discovered, the new patient that is now linked to those history entries will be auto-assigned to the invoice line-items.
- After selecting the desired option click **Done** to complete the invoice transfer.

When an invoice is transferred from the original client an entry will appear in the Account History indicating the invoice was transferred and will contain the client account number it was transferred to. For the client the invoice was transferred to an entry will also appear in their accounting indicating the invoice was transferred with the invoice number.

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