

# Invoicing

When you invoice a client, many related procedures happen automatically; you can also perform many tasks during the invoicing process. After an invoice is processed and posted, Cornerstone\* Software updates the reminder information and the patient's medical file, generates any departing instructions or special actions linked to the invoice items, and adds the invoice total to the practice sales totals. For Petly\* Plans subscribers, available plan items are also automatically discounted and are clearly indicated on screen as well as on the printed invoice.

The screenshot shows the 'Client Invoice for Donald Maccomb - 3987' window. It is divided into several sections:

- Client area:** Contains client information such as Client ID (39757), Name (Donald Maccomb), and Last Payment (\$5.23).
- Patient area:** Displays patient details including Patient ID (62425), Name (Gertrude), Age (9 Yrs. 3 Mos.), Weight (73.80 pounds), Sex (Spayed Female), and Breed (Retriever, Golden).
- Plan status:** Shows the current plan as 'Active Plan'.
- Invoice area:** Displays Invoice number (3987), Invoice type (Invoice - Plan Expense), Receptionist (Michelle Campoli, CVT, CLPM), and Invoice total (\$179.18).
- Accounts receivable area:** Shows Accounts receivable Current (\$0.00), 30 days (\$0.00), 60 days (\$0.00), 90 days (\$0.00), A/R Total (\$0.00), and Balance Due (\$179.18).
- Action buttons:** A vertical toolbar on the right includes buttons for Post, Save, Preview, Discount, Print, Email, Load, Petly\* discount, and Cancel.
- Line item entry grid:** A table listing items with columns for Item ID, Item Description, Quantity, Amount Staff, Center, Disc, Tax, and Date.
 

Item ID	Item Description	Quantity	Amount Staff	Center	Disc	Tax	Date
WP2022	WP Exam - Annual Wellness	1.00	\$53.9522	H	No	No	04/02/2021
WP3110	WP SNAP-40X In House HWY	1.00	\$24.9522	H	No	No	04/02/2021
WP2500	WP Rabies 1 yr Canine	1.00	\$22.0022	H	No	No	04/02/2021
TRF60	Trifexis 60-120 lbs PER DOSE	6.00	\$126.0022	H	No	Yes	04/02/2021
2560	Poliflore	1.00	\$23.1022	H	No	Yes	04/02/2021
2560	EAR CLEANING	1.00	\$27.5022	H	No	No	04/02/2021
- Applied discounts:** A pop-up window titled 'Calculated Price for Trifexis 60-120 lbs PER DOSE' shows a discount of \$6.30 applied to the invoice amount of \$126.00, resulting in a calculated amount of \$119.70.
- Invoice task buttons:** A toolbar at the bottom includes buttons for Label, Special, Departing, Pharmacy, Update Appt., Travel Sheet, and Copy To.

## Open the Client Invoice window

- **Patient Clipboard\***—In the Client or Patient List area, right-click and select **Invoice**.
- **Client/Patient Search window**—Right-click a client or patient result card and select **Invoice**.
- **Toolbar**—Click the **Invoice** button

## Create an invoice

**Tip:** You can start the invoice from the Patient Visit List (PVL).

1. In the Client Invoice window, if the client information is not displayed, type the ID in the **Client ID** box or press **F2** or double-click to search for the client. The client's oldest open invoice (i.e., saved but not posted) automatically appears.
2. In the **Invoice number** box, press **Tab** to accept the invoice number and move to the next box (for an existing invoice). To open a different invoice, press **F2** and select the invoice.
3. (Optional) From the **Invoice type** drop-down list, select the invoice type. **Note:** This step may be required based on your invoicing default settings.
4. In the **Receptionist** box, either accept the default ID, enter a different ID, or press **F2** to search for and select a staff member. Press **Tab** to accept the ID and move to the next box.

- If the patient record is not displayed, in the **Patient ID** box, enter the patient ID or press **F2** to search for and select the patient. Press **Tab** to accept the ID. If there are invoice items on the PVL for this patient, the PVL window opens.  
**Note:** Depending on your invoice default settings, you may be prompted to open the PVL; click **Yes**.
- Select or clear the **Include** checkbox for each status, if necessary, and make any other changes. Click **Transfer** to move the items to the invoice. Add additional items as needed. To remove an item, click the item ID or quantity field and press **Ctrl+D**.
- If there are additional patients to invoice, select their names from the list and add items. If you see a special action for a PVL, double-click the **Patient Visit** action to open the PVL, make updates, and click **Transfer**. Repeat for any other patients.
- Perform any other tasks, such as applying discounts, verifying inventory details, processing special actions, resolving not-requested laboratory tests or imaging results, etc.
- Click **Post** and then complete any additional tasks you are prompted to perform. **Note for Petly Plans:** Posting will do a final check of available plan items and apply or remove discounts accordingly.

## Other Client Invoice window actions

To...	Do this...
Post an invoice	Click <b>Post</b> . Make any changes and click <b>OK</b> . On the Payment window, process the payment. See the <a href="#">Client Account—Payments Quick Reference Guide</a> for more information.
Save an invoice	Click <b>Save</b> to save an invoice with an open status so you can make changes or add to the invoice. Items on saved invoices are not counted until the revenue is posted.
Correct or void an invoice	To correct an open or saved invoice, make changes and then save or post the invoice. Once posted, the invoice can only be voided, not corrected. Select the invoice, click <b>Void</b> , and then create a new invoice. If you need to address only a few incorrect items on an invoice, simply create and post a new invoice containing just those items, using a negative quantity for each item.
Email an invoice	From either the Post Invoice or Payment window, select the <b>Email invoice</b> checkbox.

**Tip:** To view all open invoices, click the **Invoices** tab of the Daily Planner .

## Invoice task buttons

**Rx Label**—Create a prescription instruction; select the item ID for this item and click the button.

**Special**—If this button is enabled, there are invoice items with special actions to process.

**Departing**—View departing instructions linked to items on the invoice and add more instructions.

**Pharmacy**—If you have the Veterinary Pharmacy Reference (VPR) software installed, print information sheets.

**Make Appt**—Open the Appointment Scheduler to make a new appointment.

**Travel Sheet**—Open a travel sheet and select items to add to the invoice.

**Copy To**—Copy invoice items from one patient to another.

## Keyboard shortcuts

<b>F1</b>	Display on-screen Help for the current window.
<b>F2</b>	Look up values for a list, such as ID fields.
<b>Tab</b>	Move the cursor to the next field.
<b>Shift+Tab</b>	Move the cursor to the previous field.
<b>Ctrl+D</b>	Delete the selected record.

## Right-click menus

Use the right-click menus for quick access to many tools.

**Tip:** Double-click in ID fields to search for an item.

## For more information

For invoicing and payment setup and detailed instructions, see the “Invoicing and Payment” section of the Cornerstone Help . Go to [idexxlearningcenter.com](http://idexxlearningcenter.com) to view snippet videos about many other Cornerstone features.

Find this document at [idexx.com/cornerstonehelp](http://idexx.com/cornerstonehelp).