

Billing Accessories in OD Professional

If you keep an inventory of your accessories, billing these accessories to the patient's account is easy and efficient. And by using the procedures listed below, you can maintain accurate inventory and sales records of the accessories you offer to your patients.

Patient Account

To activate the billing feature within the product tree, you must have the patient's account open. You can open the Patient's Account by either browsing for unscheduled patient's, making them active and clicking on the Patient Account subfolder or by clicking on the Patient Account icon in the ActionManager for scheduled patients.

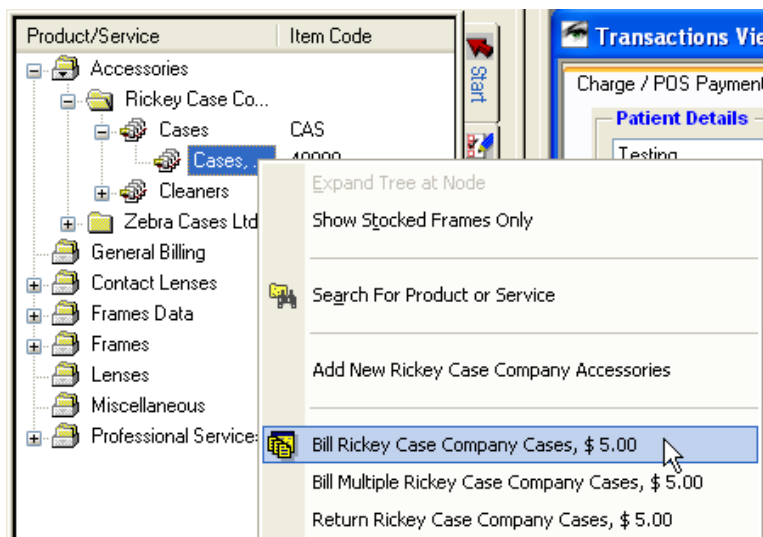
Product Tree

After opening the Patient's Account, you should then open the Product/Service Tree by either clicking on the Products tab (along the right hand side of the Workspace Manager) or clicking on the "rolodex" icon on the Command toolbar.



Accessories

With the Product tree active, click on the + sign next to the Accessories folder. This opens the sub folders and depending on how your accessories were set up (either by supplier or product), click on the + signs next to either the supplier or product, until you find the Accessory item your patient is purchasing.



Invoice Billing

When you find the accessory item, right click on the accessory item and select one of the following two menu items:

- Bill "Accessory Name", \$0.00
- Bill Multiple "Accessory Name", \$0.00.

The first menu item bills only one of the accessory items selected.

The second menu item bills multiple items of the accessory item. When you select this menu item, a dialog box opens where you can change the quantity being purchased. Click OK after entering the quantity being sold.

*If you receive the following message: **This is the last item in stock. Reorder this item?** Click Yes, No or Cancel depending on your office purchasing procedure.*

Enter any adjustments, discounts and sales taxes, as necessary, accept payment from the patient, post the invoice and print out the customer receipt. **Remember to Go Forward!**



Handling accessories in OD Professional is easy and helps keep track of your accessory inventory and sales.

Please refer to the **Returning Accessories** job aid for more information.