

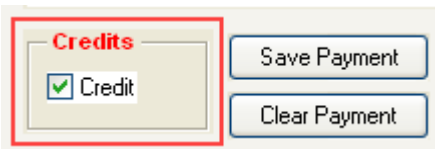
Handling Returns of Accessory Items

At times, a patient will return a product and depending on your office's return policies you will either accept or reject the product return. If your office accepts product returns, follow the steps below to record the return and handle the account credit.

It's important to remember, that any product returns needs to reflect what the patient was originally charged. This should include any discounts or adjustments provided and/or sales taxes applied. Having the original invoice (obtained from the Patient's Ledger) is helpful in completing the product return.

Patient Account

To activate the Product Return feature within the product tree, you must have the patient's account open first. Since most product returns are from unscheduled patients, browse for and make the unscheduled patient active. You should then open the Patient's Account, by double clicking on the Patient Account subfolder.



To accept a product return, you should start a new invoice and check the Credit checkbox located in the lower left side of the invoice. You will not be able to enter any product return, unless you open the Patient Account, start a new invoice and check the Credit checkbox.

Product Tree

After opening the Patient's Account, you should then open the Products 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 returning.

Invoice Billing

When you find the accessory item that the patient is returning, right mouse click on the accessory item and select the following menu item:

- Return "Accessory Name", \$0.00

Did you know that the menu item for returning a product is not engaged until you open the Patient Account?

After left clicking on the Return menu item, enter the quantity being returned and click OK. Enter any adjustments, discounts and/or sales taxes, as necessary, accept payment from the patient, post the invoice and print out a customer receipt.

Most offices will leave any credit on account for use on future purchases. If your patient insists on receiving a refund of the total credit, follow your normal office procedures for handling refunds

Remember to Go Forward!

Product Returns of accessory items in OD Professional is easy and helps keep track of your inventory and sales.

Please refer to the [Billing Accessories](#) job aid for more information.