Creating a Credit Memo

Accepting Pre-Payment for Products or Services

At times you will have a patient or a relative/family member, pre-pay for services or products.

For example, grandma may want to pre-pay for a pair of glasses for her granddaughter or a mother may want to pre-pay for a 6 month supply of contact lenses for her son or daughter.

In either scenario, you'll need to create a credit memo using the Invoice - Credit checkbox.

To create a credit memo on the patient account.

1. Browse ... for and make the patient active.
2. Double click on the Patient Account folder
3. Click on the New Invoice tab
4. Check the Credit checkbox located on the lower left side of the invoice in the Credits section.
5. Right click on the invoice and select a payment method under Receive Payment
6. Enter payment amount and click OK
7. Select Billing Code (e.g. cash, check, etc.)
8. Enter Transaction Description (e.g. Check No., Gift from Grandma, etc.)
9. Confirm Date and click OK
10. Click Save Charge – F10
11. Click Post All - F12
12. Click Finish after error checking. (Correct all errors before continuing)

After entering this pre-payment, note the negative amount on the invoice tab, which indicates the amount of credit memo on the patient account. You can then apply this credit to future invoices. Remember that credit memos are applied in chronological order and you'll need to apply an account credit as many times as there are credit memos