Create a quote

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Create a quote for a patient's services that can be saved, updated and used to create an invoice for the payer.

Create a quote

To create a new quote:

1. Open the patient's record.
2. Select **Quote** from the top menu.

   The **New Invoice** screen will open.
3. In the **Payer** field, select the payer the quote is for.
4. Add the service's **item code** into the **Item#** field, then press **Tab** to populate the other fields.
5. Select **Add** to move the item to the **Services** section.
6. Repeat steps 4 and 5 to add any additional services.
7. Select **Suppress** to save the quote.

   Use **Send to Patient** to email a copy of the quote.

   Use **Print** to print a copy of the quote.

View and update quotes

To access your quotes:

1. Open the patient's record.
2. Select **Acc Enquiry** from the top menu.

   The **Account Enquiry** screen will open.
3. From the **Display Invoices** field, select **Quotes**
4. From the **Payer** field, select **All**.
5. Select the invoice.
6. Select **Re-Quote**.
7. Make the required updates:

   - To modify a service, select it and select **Change**. This will place the service into the editable fields.
   - To delete a service, select it and select **Change**, then select **Delete**.
8. Select **Suppress** to save the changes.

   If you **Print** or **Email** a saved quote, it will say **Duplicate Quotation** on the quote. If you do not want this text, create another quote and print it before you close it.
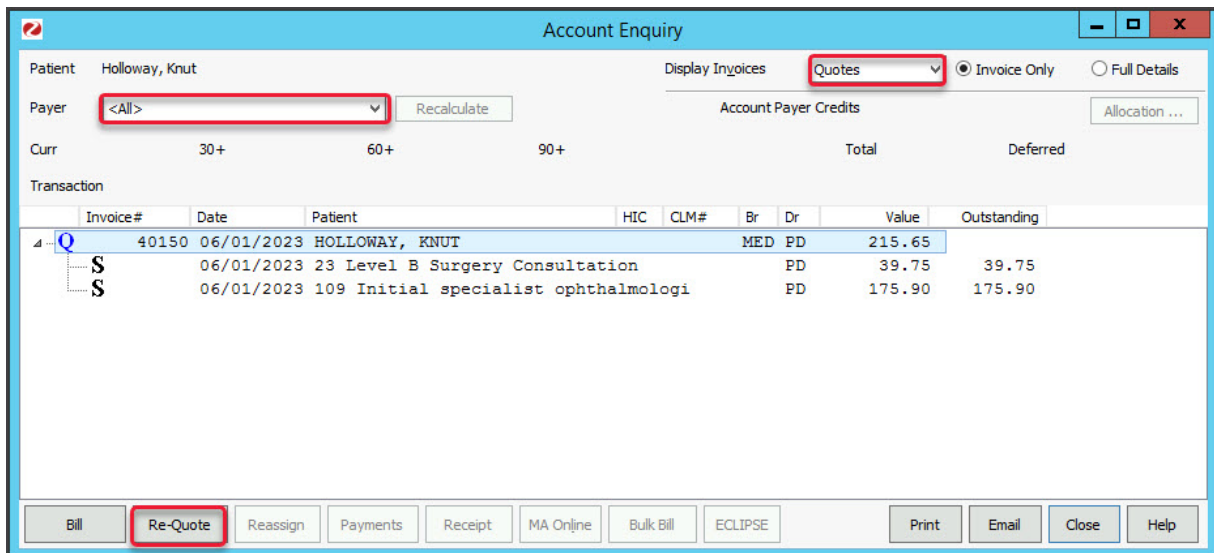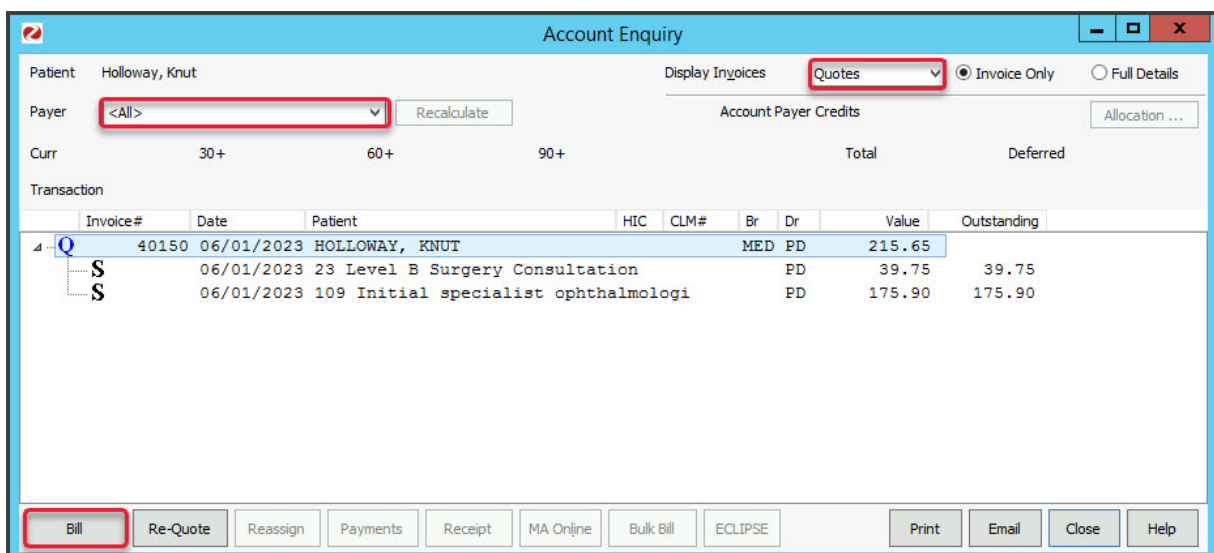
Bill from a quote

Use a quote to raise an invoice:

1. Open the patient's record.
2. Select **Acc Enquiry** from the top menu.

   The **Account Enquiry** screen will open.
3. From the **Display Invoices** field, select **Quotes**
4. From the **Payer** field, select **All**.
5. Select the invoice.
6. Select **Bill**.

   This will use the quote to raise an invoice. The original quote will still stay in the system.
7. Process the invoice and payment for the payer. For example, as a private patient or 3rd party.

Link a quote to a surgical booking

You can add a quote directly to a surgical procedure as explained in Step 12 of the Book a Surgical Procedure guide.

Use the **Bill from a quote** steps above, if you want to use the quote liked to the surgical procedure to invoice the payer.