

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.

The screenshot shows a 'Quotation' window for patient 'Holloway, Knut'. The window is titled 'Holloway, Knut' and has a menu bar with 'Quote' highlighted in red. The 'Quote' button is also highlighted in red. The window contains several sections: 'Patient Details', 'Payer', 'Doctor', 'Request/Referral Dr', 'Claim', 'Payer Debts', 'Fund Details', 'Refund/Gap Calculation', 'Invoice Style', and 'Services'. The 'Services' section contains a table with columns: Date, Item#, Description, Fee, Tax, Unit Value, Qty, Amount, Notes, Estim. Refund, and Gap. The table has two rows of data. The 'Add' button is highlighted in red. The 'Supress' button is highlighted in red.

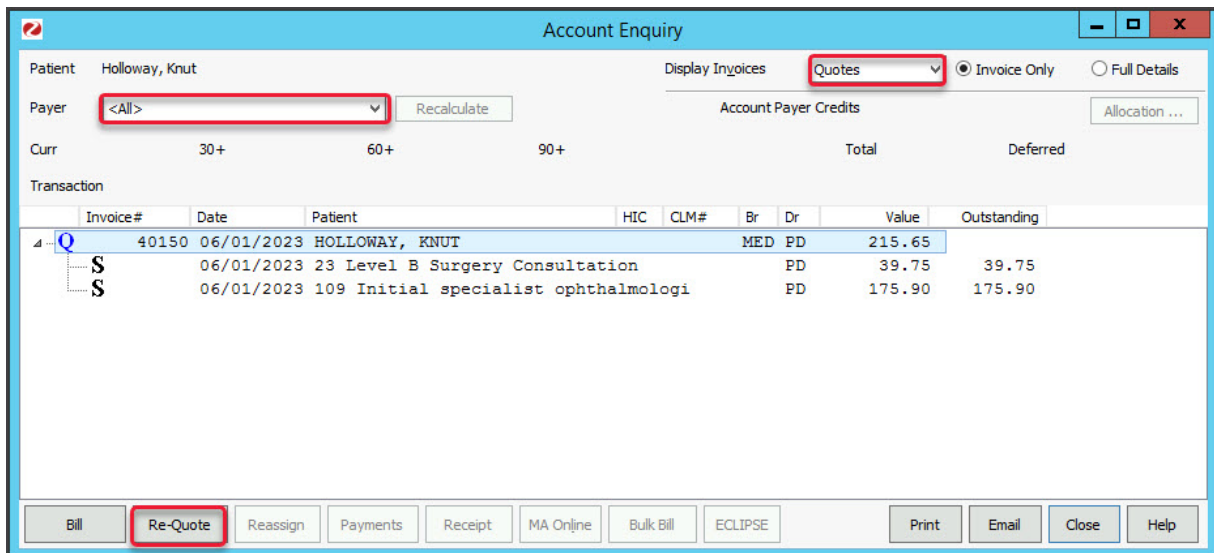
Date	Item#	Description	Fee	Tax	Unit Value	Qty	Amount	Notes	Estim. Refund	Gap
06/01/2023	109	Initial specialist ophthalmologist paedi	P1	FRE	227.80	1	227.80		175.90	51.90
06/01/2023	23	Level B Surgery Consultation	P1	FRE	71.30	1	71.30		39.75	31.55

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 **Supress** 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.



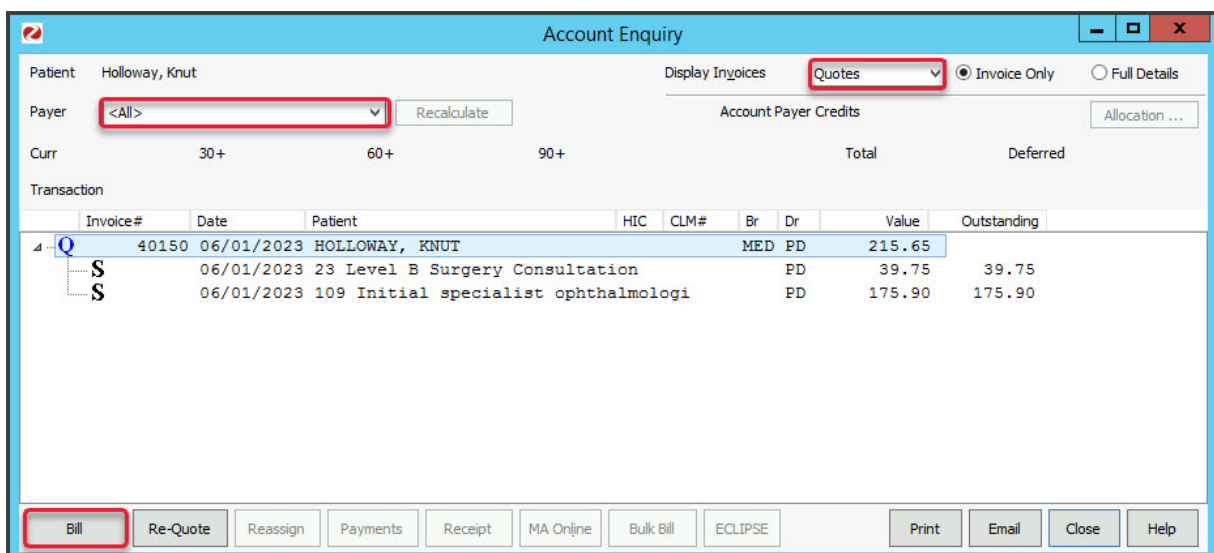
Bill from a quote

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 linked to the surgical procedure to invoice the payer.

