

PrimaryClinic

How to customize invoices, receipts or statements

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GLOBAL HEALTH

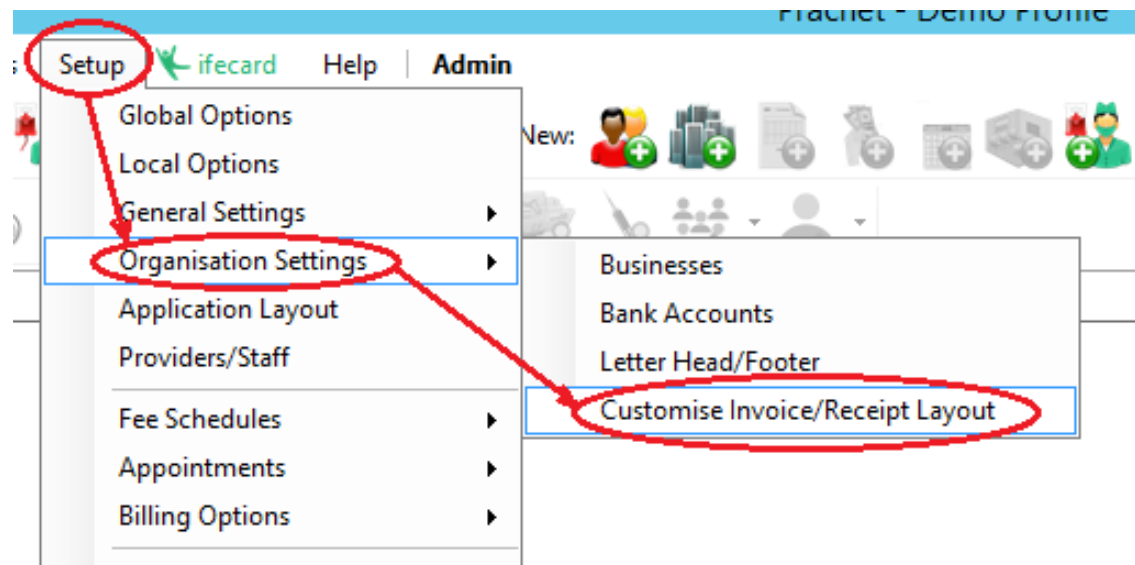
Invoices, receipts or statements

With PrimaryClinic version 1.4.9 or later, you will be able to show, hide, or change certain information on invoices, receipts, or statements.

Invoices, receipts or statements

To change the printout:

Select **Setup** > **Organisation Settings** > **Customise Invoice/Receipt Layout** from the Main Menu



Invoices, receipts or statements

In the **Customise invoice/receipt** layout window, the image below shows where the title or header can be changed to suit your need.

The screenshot shows a software window titled "Customise invoice/receipt layout". On the left, there is a "Show/Hide" tree view with categories: Header, Patient, Payer, Provider, Others, and Detail. The "Invoice Title" field is highlighted with a green box and contains "TEST TAX INVOICE".

The main area displays a "Sample Invoice" for "Good Health Medical Centre". The title "TEST TAX INVOICE" is highlighted with a green box. The invoice includes patient and provider details, a service table, and a total balance.

Date	Time	Item	Description	Fee (AUD)	Qty	Total	Received	Balance
05/06/2018	09:05	163	Professional attendance for a period of not less than 4 hours but less than 5 hours (other than a service to which another item applies) on a patient in imminent danger of death, No. of Pat.: 1, LSPN: 123456, SCP: 1234:	664.55	1	664.55	0.00	664.55
Invoice Total:						664.55	0.00	664.55

Balance Due : 664.55
GST included in Balance : 0.00

At the bottom, the "Preview" and "Save" buttons are highlighted with green boxes.

Invoices, receipts or statements

This image shows which setting on the left corresponds to a particular information in the layout.

You can see how the changes you've made will affect the layout by clicking on **Preview** and once you are happy with the changes, click on **Save** to make it permanent.

The screenshot shows a window titled "Customise invoice/receipt layout". On the left, there is a "Show/Hide" tree view with categories: Header, Payer, Provider, Others, and Detail. On the right, a "Sample Invoice" is displayed. The invoice is for "Good Health Medical Centre" and is titled "TEST TAX INVOICE". The invoice includes patient information, payer information, provider information, and a table of services. The "Detail" section of the settings tree is expanded, showing a table of services. Green boxes and arrows highlight the following:

- Payer information:** Invoice Number: 9999, Issue Date: 11/06/2018, Payer Number: 00001, Printed Date: 11/06/2018
- Patient information:** Mr Test Patient, 123 Test Street, ACTON, ACT2601
- Provider information:** PROVIDED BY: Test Provider - 2405331K
- Others information:** FACILITY ID : XYZ
- Detail information:** This is a sample text generated to illustrate the new layout

Date	Time	Item	Description	Fee (AUD)	Qty	Total	Received	Balance
05/06/2018	09:05	163	Professional attendance for a period of not less than 4 hours but less than 5 hours (other than a service to which another item applies) on a patient in imminent danger of death, MBS Item Num: 163, Service Text: testing; NNA; DNS; Not Multi Procedure, No. of Pat.: 1, LSPN: 123456, SCP: 12345	664.55	1	664.55	0.00	664.55

Invoice Total: 664.55 0.00 664.55

Balance Due : 664.55
GST included in Balance : 0.00

Your account is overdue for 30 days. Please pay immediately, otherwise, legal action will be taken.

Tutorials and FAQs

Read or watch more tutorials on the website.

<https://www.primaryclinic.com.au/tutorials/>

If you have a question or need some help please check the Frequently Asked Questions page before contacting the support team.

<https://www.primaryclinic.com.au/faqs/>

Support:

You can reach support by lodging a ticket on our website:

www.primaryclinic.com.au/support/

Or email us at:

primaryclinic@global-health.com

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