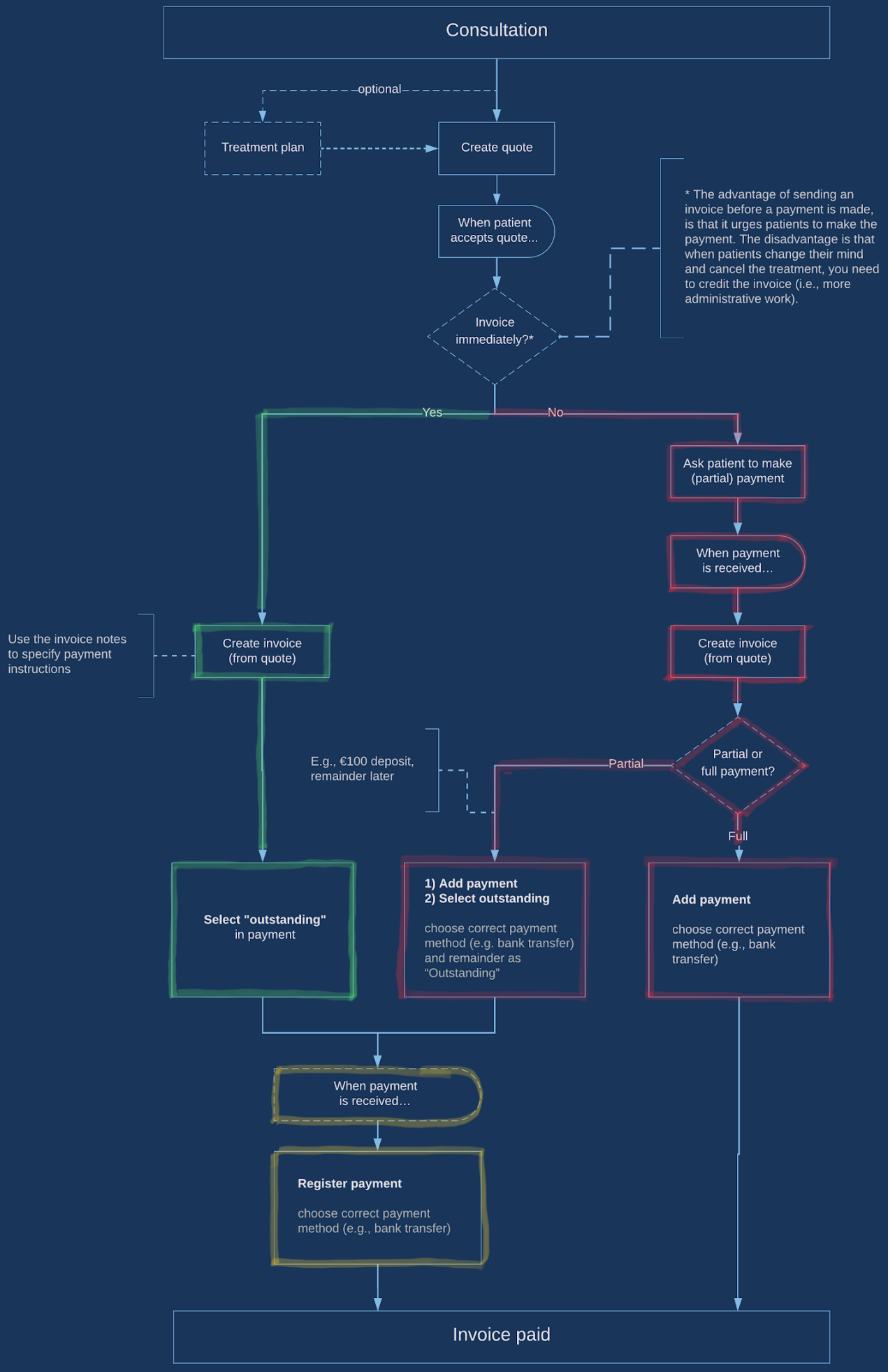
Consultation
optional
Treatment plan
Create quote
When patient accepts quote...
Invoice immediately?*
* The advantage of sending an invoice before a payment is made, is that it urges patients to make the payment. The disadvantage is that when patients change their mind and cancel the treatment, you need to credit the invoice (i.e., more administrative work).
Yes
No
Ask patient to make (partial) payment
When payment is received…
Create invoice (from quote)
Use the invoice notes to specify payment instructions
Create invoice (from quote)
E.g., €100 deposit, remainder later
Partial
Partial or full payment?
Full
Select "outstanding" in payment
1) Add payment
2) Select outstanding
choose correct payment method (e.g. bank transfer) and remainder as "Outstanding"
Add payment
choose correct payment method (e.g., bank transfer)
When payment is received…
Register payment
choose correct payment method (e.g., bank transfer)
Invoice paid