



Accounts Receivable (AR)

September 2019

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Accounts Receivable (AR)

The Kroll Accounts Receivable module allows users to manage patient Charge Accounts. This allows customers to charge prescription and non-prescription items (as determined at store level) to an account to be invoiced at a later date. A statement is then generated and show invoices in the specified time period and are sent out to the customer on a regular basis, as determined by the pharmacy.

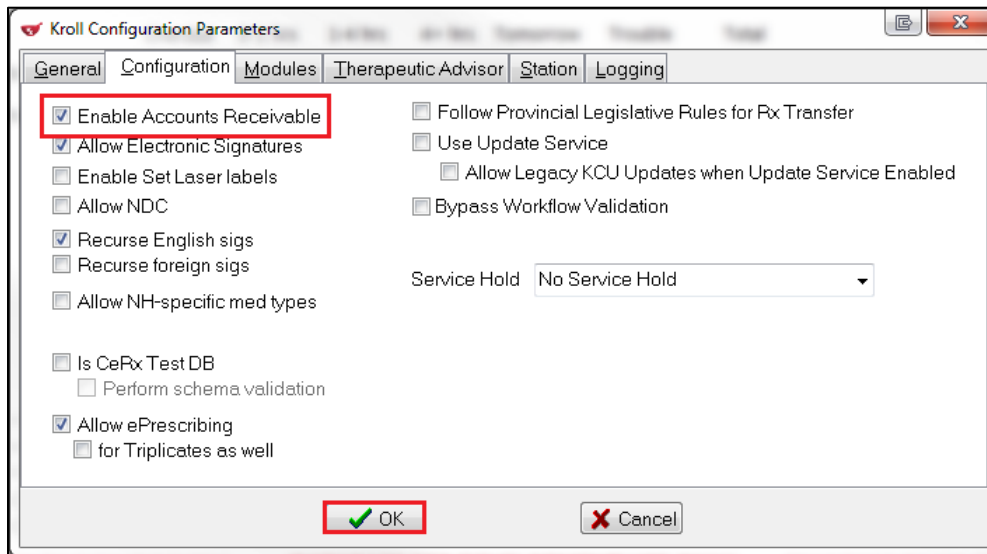
Any invoices that remain unpaid and are carried forward from one statement to the next are subject to finance charges under the discretion of the pharmacy. An invoice may contain more than one item and a payment made by the customer may be applied to one or more invoices. Likewise, one invoice may have a number of payments applied to it. To have all charges for each family member consolidated into one statement and forwarded to a designated payor, there is a 'Bill to' option. This eliminates several statements for each family from being generated.

Configuration

This section explains how to enable the Accounts Receivable module and how to select the Accounts Receivable configuration settings most suitable for your pharmacy.

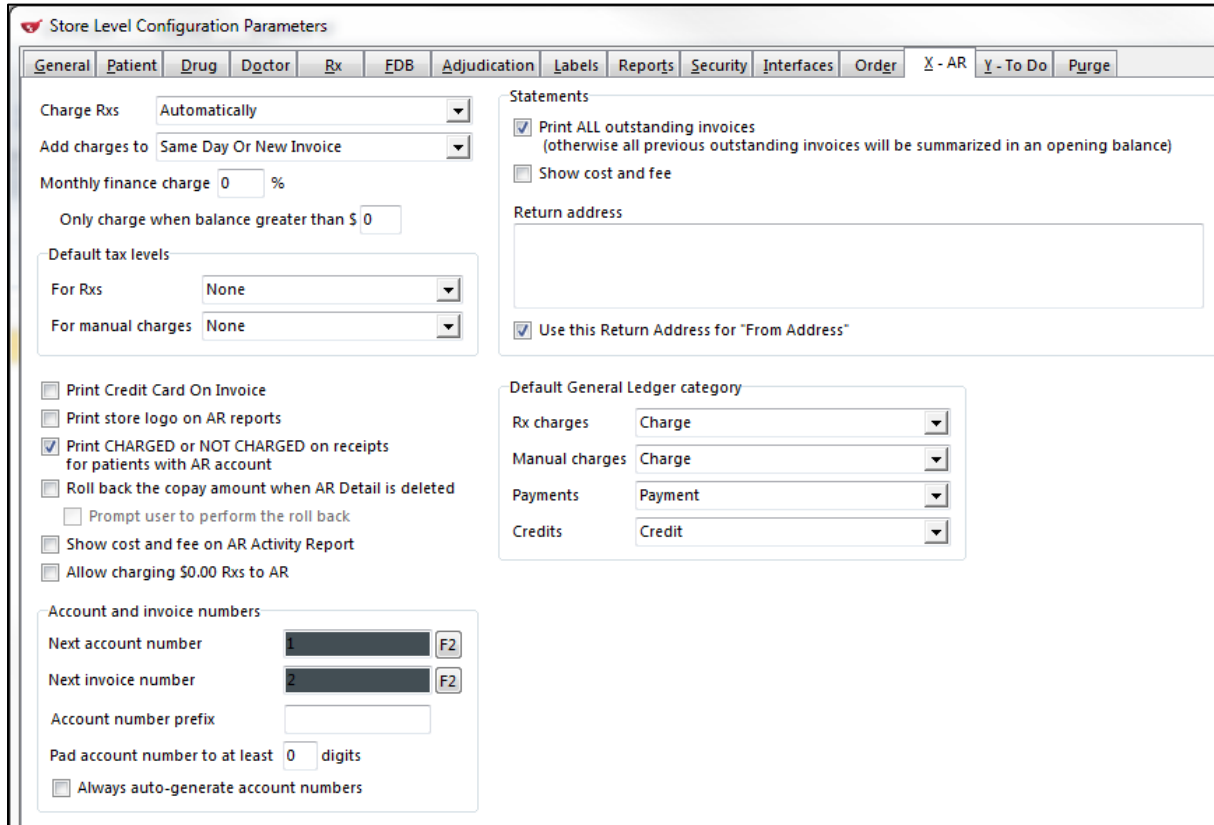
Kroll Configuration

1. Select **File > Configuration > Kroll > Configuration**.
2. Place a checkmark next to **Enable Accounts Receivable** and click **OK**.



Store Configuration

Configuration settings for the Accounts Receivable module can be accessed via **File > Configuration > Store > X - AR**. Each of the settings on the screen are described below.



- **Charge Rxs:** Determines how often items are charged to the patient's AR account.
 - **Automatically:** You will not be prompted to charge the prescription to the patient's AR account; Rxs will be charged automatically.
 - **Prompt:** You will be prompted to charge the Rx to the patient's AR account, if the patient has an account set up.
 - **Do Not Charge:** You will not be prompted to charge the prescription to the patient's AR account and Rxs will not be charged to the patient's AR account; however, Rxs can be manually charged by selecting **Rx > Charge to AR**.

- **Add charges to:** Determines how and when new invoices are created.
 - **Same Day Or New Invoice:** All charges from the same day will be grouped together in a single invoice. If an invoice does not exist for that day a new one will be created.
 - **New Invoice:** A new invoice will be created for every charge to the account.
 - **Same Day And Patient Or New Invoice:** All charges from the same day and the for same patient will be grouped together in a single invoice. Charges that occur on the same day but for a different patient (i.e., a linked family member) will be added to a separate invoice.
 - **Same Month And Patient Or New Invoice:** All charges from the same month and for the same patient will be grouped together in a single invoice. Charges that occur in the same month but for a different patient (i.e., a linked family member) will be added to a separate invoice.
- **Monthly finance charge [x]%**: Applies a monthly charge to all AR accounts.
- **Only charge when balance greater than \$[x]**: Applies the monthly finance charge only if the patient's balance is greater than the specified amount.
- **Default tax levels For Rxs:** The default tax that applies to all Rxs.
- **Default tax levels For manual charges:** The default tax that applies to non-Rx items charged to the patient's AR account. This value is also applied if **Charge Rx** is set to **Do Not Charge** and you manually charge the Rx via the **Rx** menu.
- **Print Credit Card On Invoice:** Prints the patient's full credit card number in the invoice. Credit card numbers will be masked if this is disabled.
- **Print store logo on AR reports:** Prints the store logo on all AR reports. Store logos can be uploaded in the **General** tab.
- **Print CHARGED or NOT CHARGED on receipts for patients with AR account:** Prints the patient's charged/not charged status on the receipt.
- **Roll back the copay amount when AR Detail is deleted:** Removes the copay amount when an item is deleted from the patient's AR account.
- **Prompt user to perform the roll back:** Prompts the user to remove the copay amount when an item is deleted from the patient's AR account.

- **Show cost and fee on AR Activity Report:** Segregates the cost and fee from the total in the AR Activity Report. Otherwise, the cost and fee are included in the total and are not shown separately.
- **Allow charging \$0.00 Rxs to AR:** Allows \$0.00 Rxs to be charged to the patient's AR account.
- **Next account number:** The number that will be assigned to the next newly created AR account.
- **Next invoice number:** The number that will be assigned to the next newly created invoice.
- **Account number prefix:** The number that precedes all AR account numbers.
- **Pad account number to at least [x] digits:** Adds leading zeros to account numbers that do not contain the specified number of digits.
- **Always auto-generate account numbers:** Auto-generates account numbers for newly created AR accounts.
- **Print ALL outstanding invoices:** Prints all outstanding invoices in the AR Statement. Otherwise, all previous outstanding invoices will be summarized in an opening balance.
- **Show cost and fee:** Segregates the cost and fee from the total in the AR Statement. Otherwise, the cost and fee are included in the total and are not shown separately.
- **Return address:** The address where undeliverable AR Statements will be returned to.
- **Use this Return Address for "From Address":** Uses the specified return address as the "from" address on AR Statements mailed to patients.
- **Default General Ledger category:** Determines how AR items are categorized in the general ledger.

Creating a New AR Account

This section explains how to create a new AR account for a patient.

1. Call up the patient.
2. Select **AR Profile** from the right navigation pane.

The screenshot shows a software interface for patient management. The main area contains fields for patient information such as Last Name (Patient), First Name (Test), Salutation (Mr.), Address (100 Any St), City (Toronto), and Province (ON). There are also sections for Phone Numbers, Birthdate, Age, Gender (Male), Language (English), Height, Weight, and Family Doctor. A 'Profile' navigation pane on the right lists various options, with 'AR Profile' highlighted in red. Other options include All Rxs, Active Rxs, Refillable Rxs, Pricing Profile, Not Disp./OTC Rxs, Rxs Filled in Error, Suspended Rxs, and Perform FDB Analysis. At the bottom, there are tabs for 'General', 'Family', 'Nursing Home', 'Copays', 'Communications', and 'Other'.

3. Select **Create a New AR Account**.

The dialog box is titled "Create New AR Account?". It contains the text "This patient is not currently set up for Accounts Receivable." Below this text, there are two buttons: "Create a New AR Account" (highlighted with a red box) and "Link to an Existing AR Account". At the bottom, there is a "Cancel" button with a red 'X' icon.

4. If you do not have **Always auto-generate account numbers** enabled in the **Store Level Configuration Parameters** screen, you will be prompted to enter an AR number. Enter a number in the space provided, or check **Generate AR Number** to have Kroll assign an account number to the patient. Click **OK**.

The dialog box is titled "Provide AR Number". It contains the text "Please provide AR Number". Below this text, there is a text input field containing the value "123456789" (highlighted with a red box). To the right of the input field is a checkbox labeled "Generate AR Number". At the bottom, there are two buttons: "OK" (highlighted with a red box) and "Cancel".

5. The **AR Profile** screen will appear.

The AR Profile Explained

The AR Profile screen is where most AR activities take place. This screen also tracks the patient's invoice and payment information. The contents of this screen are described below.

AR Profile								
Account #	1234567	<input type="checkbox"/> Inactive	Current	\$5.63	Credit Limit	\$500.00		
Billed To	Patient, Test		30 Days	\$0.00	Total	\$5.63		
Filter By:	Current Activity	<input type="checkbox"/> Waive Finance Charges	60 Days	\$0.00	Unposted Amount	\$0.00		
		<input type="checkbox"/> Duplicate Statement	90 Days	\$0.00	Effective Total	\$5.63		
Detail		Invoices	Payments	Comments				Ctrl
Items (2)								
Status	Invoice #	Date	RxNum	Patient Name	Comment	GL Category	Amount	
Posted	3	22/06/2016		Patient, Test	Tooth brush	Charge	\$2.00	
Posted	3	22/06/2016		Patient, Test	30 Tegretol Oral Susp 100mg/5ml	Charge	\$13.63	

- **Account #:** The account number that was assigned by the user or the system.
- **Billed To:** The account holder who is responsible for the charge account. This patient will receive the statements sent out to the pharmacy.
- **Filter By:** Determines which AR items are currently displayed in the profile.
 - **Current Activity:** Displays all items that have been recently added to the account (i.e., charges, invoices, and payments). All outstanding items that have been paid in full but are not yet closed will also be displayed.
 - **Last 90 Days:** Displays all activities that took place within the last 90 days, including outstanding and closed items.
 - **All Activity:** Displays all activity in the account, including both outstanding and closed items.
- **Inactive:** Enabling this setting will prevent new charges from being added to the account.
- **Waive Finance Charges:** Prevents the configured finance charge from being added to the patient's account.
- **Duplicate Statement:** Ensures two copies of the AR Statement are sent to the patient.
- **Current:** The patient's current AR balance.
- **30 Days:** All charges that the patient has accrued within the last 30 days.

- **60 Days:** All charges that the patient has accrued within the last 60 days.
- **90 Days:** All charges that the patient has accrued within the last 90 days.
- **Credit Limit:** The maximum amount that can be charged to the patient’s AR account in a given billing cycle. A warning will be displayed when the account is nearing or is over its limit.
- **Total:** The patient’s current total balance, excluding any unposted amounts.
- **Unposted Amount:** The total cost of all unposted items charged to the patient’s account.
- **Effective Total:** The patient’s current total balance, including any unposted amounts.

Detail Tab

The **Detail** tab displays the account’s AR charge details. You can add, delete, and edit charges from this screen.

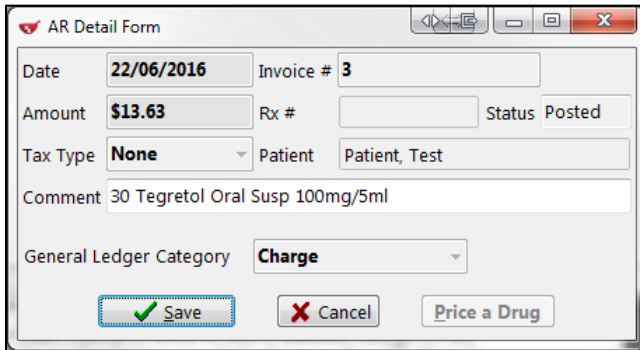
AR Profile

Account #	1234567	<input type="checkbox"/> Inactive	Current	\$5.63	Credit Limit	\$500.00
Billed To	Patient, Test		30 Days	\$0.00	Total	\$5.63
Filter By:	Current Activity	<input type="checkbox"/> Waive Finance Charges	60 Days	\$0.00	Unposted Amount	\$0.00
		<input type="checkbox"/> Duplicate Statement	90 Days	\$0.00	Effective Total	\$5.63

← Ctrl →

Items (2)								(F2) (Ins) (Del)
Status	Invoice #	Date	RxNum	Patient Name	Comment	GL Category	Amount	
Posted	3	22/06/2016		Patient, Test	Tooth brush	Charge	\$2.00	
Posted	3	22/06/2016		Patient, Test	30 Tegretol Oral Susp 100mg/5ml	Charge	\$13.63	

Double-click a charge item to view its details. The **AR Detail Form** will appear. Other than the **Comment** field, information displayed in this form cannot be edited. Click **Save** or **Cancel** to return to the AR profile.



AR Detail Form

Date: 22/06/2016 Invoice #: 3

Amount: \$13.63 Rx #: Status: Posted

Tax Type: None Patient: Patient, Test

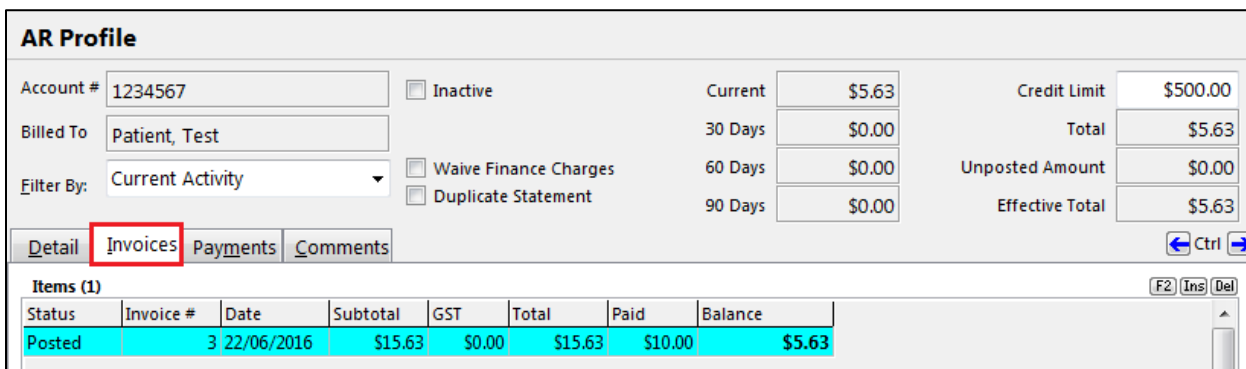
Comment: 30 Tegretol Oral Susp 100mg/5ml

General Ledger Category: Charge

Buttons: Save, Cancel, Price a Drug

Invoices Tab

The **Invoices** tab displays all invoices and their payment details for the account.



AR Profile

Account #: 1234567 Inactive Current: \$5.63 Credit Limit: \$500.00

Billed To: Patient, Test 30 Days: \$0.00 Total: \$5.63

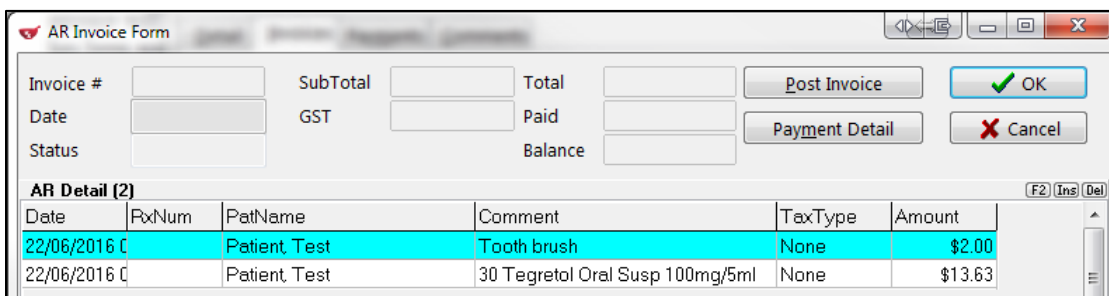
Filter By: Current Activity Waive Finance Charges 60 Days: \$0.00 Unposted Amount: \$0.00

Duplicate Statement 90 Days: \$0.00 Effective Total: \$5.63

Tabs: Detail, **Invoices**, Payments, Comments

Status	Invoice #	Date	Subtotal	GST	Total	Paid	Balance
Posted	3	22/06/2016	\$15.63	\$0.00	\$15.63	\$10.00	\$5.63

Double-click an invoice item to view its details. The **AR Invoice Form** will appear, displaying each of the items included in the invoice.



AR Invoice Form

Invoice #: SubTotal: Total: Post Invoice: OK

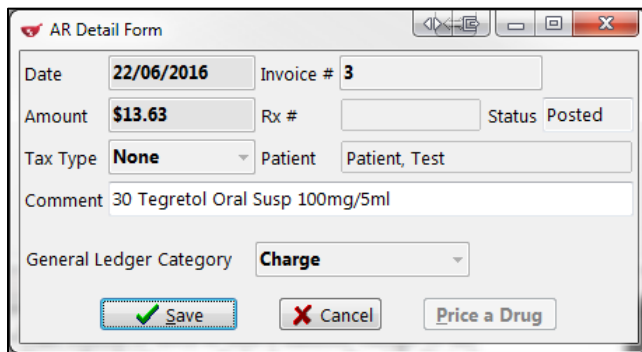
Date: GST: Paid: Payment Detail: Cancel

Status: Balance:

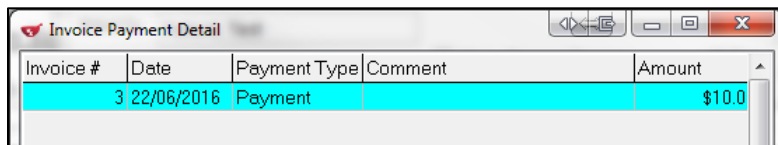
AR Detail (2)

Date	RxNum	PatName	Comment	TaxType	Amount
22/06/2016	C	Patient, Test	Tooth brush	None	\$2.00
22/06/2016	C	Patient, Test	30 Tegretol Oral Susp 100mg/5ml	None	\$13.63

Double-click a charge item to view its details. The **AR Detail Form** will appear.



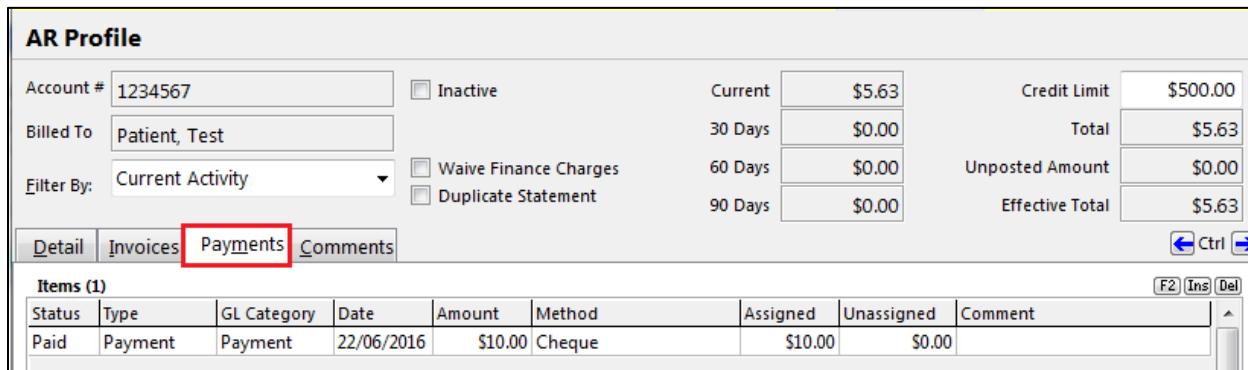
To view payment details, select an AR detail item and click **Payment Detail**. The **Invoice Payment Detail** form will appear. Click **OK** to return to the **AR Invoice Form**.



Invoice #	Date	Payment Type	Comment	Amount
3	22/06/2016	Payment		\$10.0

Payments Tab

The **Payments** tab allows you to add, delete, and edit payments from this screen.



AR Profile

Account # 1234567 Inactive Current \$5.63 Credit Limit \$500.00

Billed To Patient, Test 30 Days \$0.00 Total \$5.63

Filter By: Current Activity Waive Finance Charges 60 Days \$0.00 Unposted Amount \$0.00

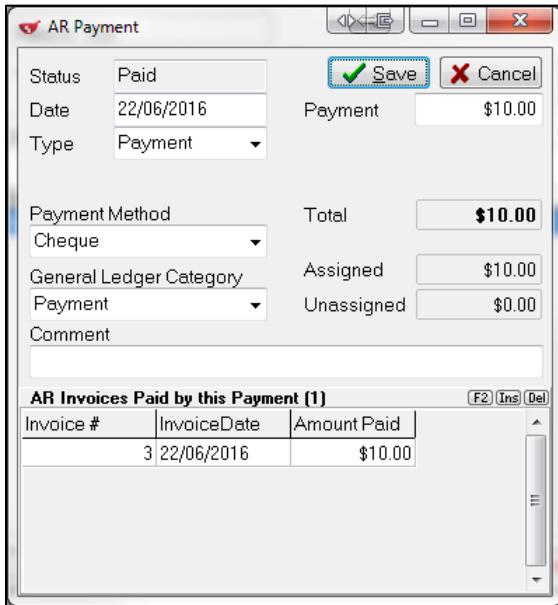
Duplicate Statement 90 Days \$0.00 Effective Total \$5.63

Detail Invoices **Payments** Comments Ctrl

Items (1) F2 Ins Del

Status	Type	GL Category	Date	Amount	Method	Assigned	Unassigned	Comment
Paid	Payment	Payment	22/06/2016	\$10.00	Cheque	\$10.00	\$0.00	

Double-click a payment item to view its details. The **AR Payment** form will appear. Click **Save** or **Cancel** to return to the **Payments** tab.



The screenshot shows the 'AR Payment' window with the following details:

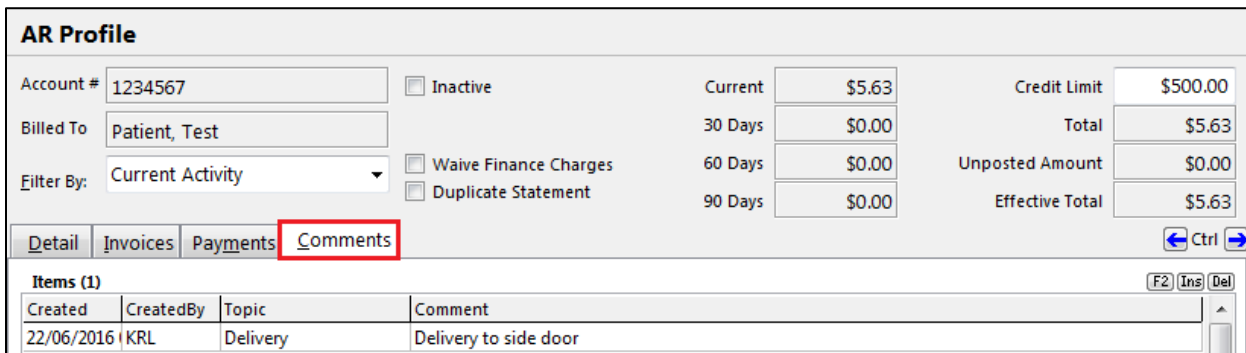
- Status: Paid
- Date: 22/06/2016
- Type: Payment
- Payment: \$10.00
- Payment Method: Cheque
- General Ledger Category: Payment
- Total: \$10.00
- Assigned: \$10.00
- Unassigned: \$0.00

Below the form is a table titled 'AR Invoices Paid by this Payment (1)':

Invoice #	InvoiceDate	Amount Paid
3	22/06/2016	\$10.00

Comments Tab

The **Comments** tab allows you to add, delete, and edit comments pertaining to the patient's account or account preferences.



The screenshot shows the 'AR Profile' window with the 'Comments' tab selected. The 'Comments' tab is highlighted with a red box.

Account # 1234567 Inactive

Billed To Patient, Test

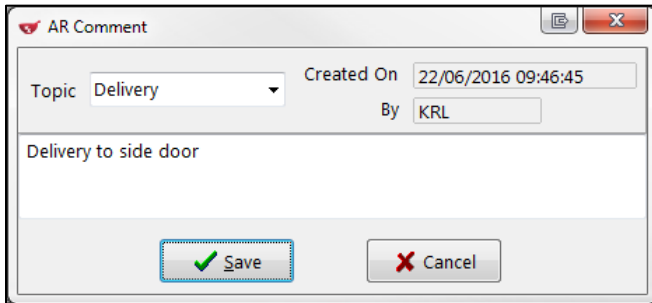
Filter By: Current Activity Waive Finance Charges Duplicate Statement

Current	\$5.63	Credit Limit	\$500.00
30 Days	\$0.00	Total	\$5.63
60 Days	\$0.00	Unposted Amount	\$0.00
90 Days	\$0.00	Effective Total	\$5.63

Items (1)

Created	CreatedBy	Topic	Comment
22/06/2016	KRL	Delivery	Delivery to side door

Click **Ins** to add a new comment, or double-click an existing comment to view its details. The **AR Comment** form will appear. Click **Save** or **Cancel** to return to the **Comments** tab.



The image shows a dialog box titled "AR Comment". It contains a "Topic" dropdown menu set to "Delivery", a "Created On" field with the value "22/06/2016 09:46:45", and a "By" field with the value "KRL". Below these fields is a text area containing the text "Delivery to side door". At the bottom of the dialog are two buttons: "Save" (with a green checkmark icon) and "Cancel" (with a red X icon).

AR Charge Items

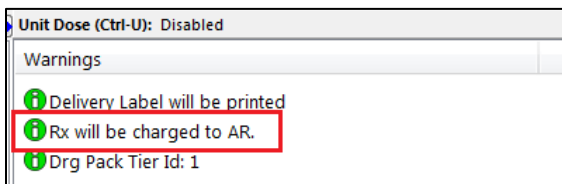
This section explains how to add, delete, and edit charge items from a patient's AR profile.

Adding Charge Items

The **Charge Rxs** selection in the **Store Level Configuration Parameters** screen determines if charge items are automatically added to the patient's AR profile, if you are prompted to add charge items, or if charge items must be added to the AR profile manually.

Automatically

If the **Charge Rxs** configuration option set to **Automatically**, all Rxs filled for the patient will be automatically charged to the patient's AR account. An '**Rx will be charged to AR**' warning will appear on the F12 screen:

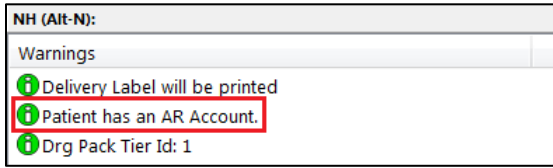


The image shows a dialog box titled "Unit Dose (Ctrl-U): Disabled". It contains a "Warnings" section with three items: "Delivery Label will be printed", "Rx will be charged to AR.", and "Drg Pack Tier Id: 1". The "Rx will be charged to AR." warning is highlighted with a red rectangular box.

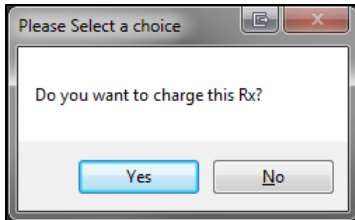
Complete the fill. The Rx will be added to the patient's AR account.

Prompt

If the Charge Rx's configuration option set Prompt, a 'Patient has an AR Account' warning will appear on the F12 screen:



When you click **F12 - Fill Rx**, a prompt will appear asking if you want to charge the Rx to the patient's AR account:



If you select **Yes**, the Rx will be added to the patient's AR account once the fill is complete.

Manually

To manually add an item to a patient's AR account, call up the patient's AR profile and select **Ins** from the **Detail** tab.

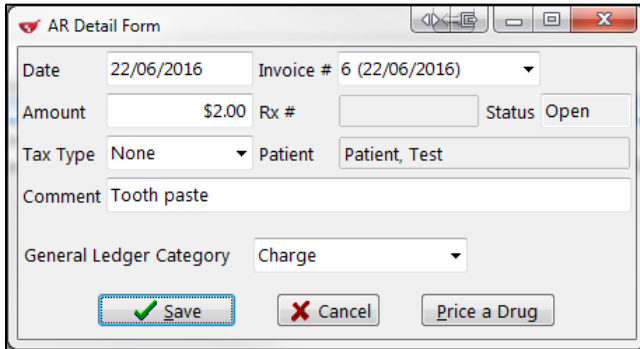
AR Profile

Account # 1234567 Inactive Current \$5.63 Credit Limit \$500.00
 Billed To Patient, Test 30 Days \$0.00 Total \$5.63
 Filter By: Current Activity Waive Finance Charges 60 Days \$0.00 Unposted Amount \$0.00
 Duplicate Statement 90 Days \$0.00 Effective Total \$5.63

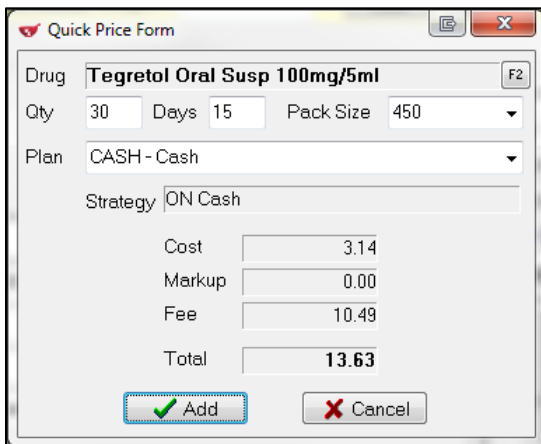
Detail Invoices Payments Comments Ctrl

Items (2)								F2 Ins Del
Status	Invoice #	Date	RxNum	Patient Name	Comment	GL Category	Amount	
Posted	3	22/06/2016		Patient, Test	Tooth brush	Charge	\$2.00	
Posted	3	22/06/2016		Patient, Test	30 Tegretol Oral Susp 100mg/5ml	Charge	\$13.63	

Complete the **AR Detail Form**. The value entered in the **Amount** field will be charged to the patient's account. If you are adding a non-prescription item, enter a description of the item in the **Comment** field. Click **Save**. The item will be added to the AR profile.



If the item is a dispensable drug, click **Price a Drug**. The **(Drg Search)** form will appear. Search for and select a drug. Enter a **Qty** and **Days** supply in the **Quick Price Form** and click **Calculate**. Pricing information will populate.



Cost	3.14
Markup	0.00
Fee	10.49
Total	13.63

Click **Add**. Click **Save** to close the **AR Detail Form**. The item will be added to the AR profile.

Deleting Charge Items

1. Call up the patient's AR profile.
2. Select a charge item with an 'Open' status and click **Del** or press the **Delete** key on your keyboard.

AR Profile

Account # Inactive Current Credit Limit

Billed To 30 Days Total

Filter By: Waive Finance Charges 60 Days Unposted Amount

Duplicate Statement 90 Days Effective Total

Detail Ctrl →

Items (3) F2 Ins Del

Status	Invoice #	Date	RxNum	Patient Name	Comment	GL Category	Amount
Open	6	22/06/2016		Patient, Test	Tooth paste	Charge	\$2.00
Posted	3	22/06/2016		Patient, Test	Tooth brush	Charge	\$2.00
Posted	3	22/06/2016		Patient, Test	30 Tegretol Oral Susp 100mg/5ml	Charge	\$13.63

3. A prompt will appear asking if you are sure you want to delete the detail item. Select **Yes**. The item will be removed from the account.

Are you sure?

Are you sure you want to delete this detail item?

NOTE: Only items with a status 'Open' can be deleted. If you attempt to delete an item with any other status, the following warning will appear.

You can't delete a detail item unless the Invoice is open

Editing Charge Items

1. Call up the patient's AR profile.
2. Select a charge item and click **F2** or press the **F2** key on your keyboard.

AR Profile

Account # Inactive Current Credit Limit

Billed To 30 Days Total

Filter By: Waive Finance Charges 60 Days Unposted Amount

Duplicate Statement 90 Days Effective Total

Detail Invoices Payments Comments Ctrl

Items (3) F2 Ins Del

Status	Invoice #	Date	RxNum	Patient Name	Comment	GL Category	Amount
Open	6	22/06/2016		Patient, Test	30 Tegretol Oral Susp 100mg/5ml	Charge	\$13.63
Posted	3	22/06/2016		Patient, Test	Tooth brush	Charge	\$2.00
Posted	3	22/06/2016		Patient, Test	30 Tegretol Oral Susp 100mg/5ml	Charge	\$13.63

3. The **AR Detail Form** will appear. If the charge item has a status of 'Open', most of the fields in the **AR Detail Form** can be edited. If the charge item has any other status, only the **Comment** field will be editable. Make the necessary changes and click **Save**.

AR Detail Form

Date Invoice #

Amount Rx # Status

Tax Type Patient

Comment

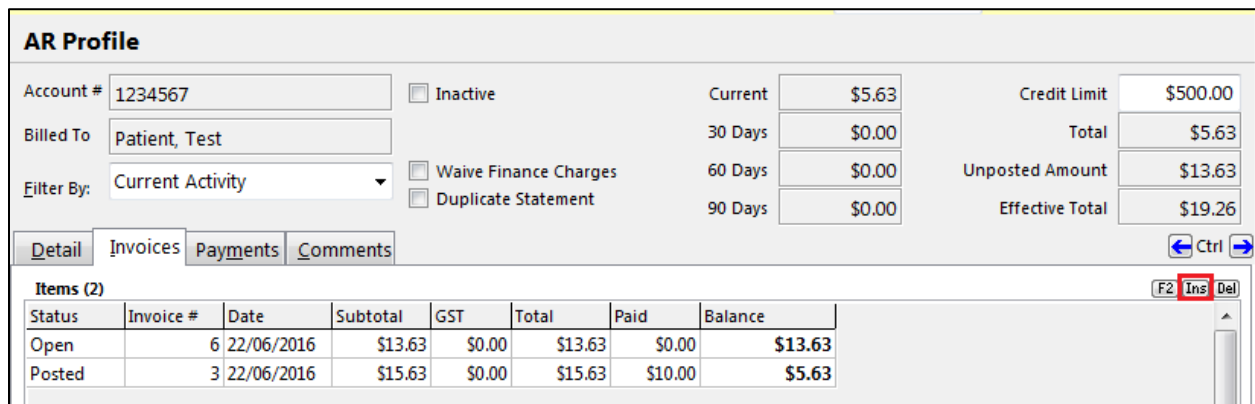
General Ledger Category

Invoices

This section explains how to add, delete, and edit an invoice. Instructions on how to post and print an invoice once all applicable charge items have been added are also provided.

Adding an Invoice

1. Call up the patient's AR profile.
2. Click the **Invoices** tab.
3. Click **Ins** or press the **Insert** key on your keyboard.



AR Profile

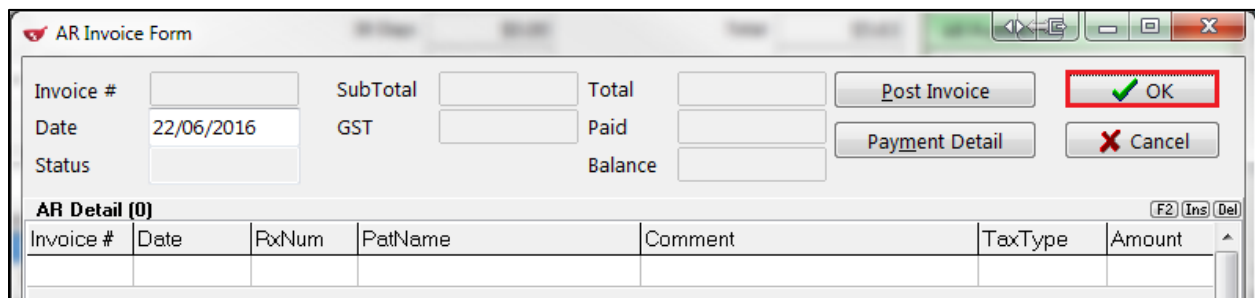
Account # 1234567 Inactive Current \$5.63 Credit Limit \$500.00
 Billed To Patient, Test 30 Days \$0.00 Total \$5.63
 Filter By: Current Activity Waive Finance Charges 60 Days \$0.00 Unposted Amount \$13.63
 Duplicate Statement 90 Days \$0.00 Effective Total \$19.26

Detail Invoices Payments Comments Ctrl

Items (2) F2 Ins Del

Status	Invoice #	Date	Subtotal	GST	Total	Paid	Balance
Open	6	22/06/2016	\$13.63	\$0.00	\$13.63	\$0.00	\$13.63
Posted	3	22/06/2016	\$15.63	\$0.00	\$15.63	\$10.00	\$5.63

4. The **AR Invoice Form** will appear. Click **OK** to save the blank invoice. Any new charge items added to the account will be included in the newly created invoice.



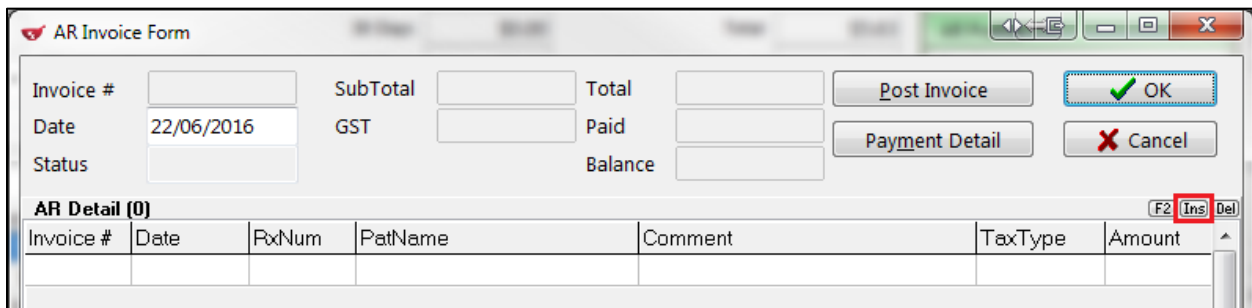
AR Invoice Form

Invoice # SubTotal Total
 Date 22/06/2016 GST Paid
 Status Balance

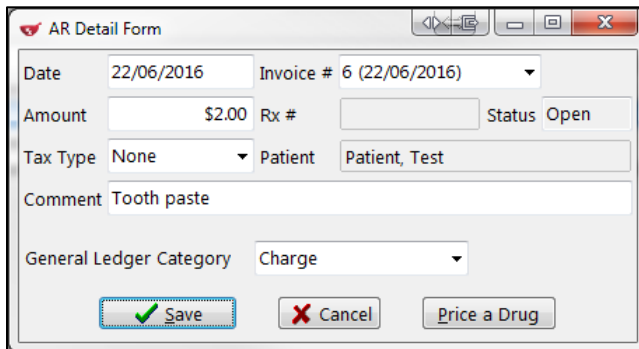
AR Detail (0) F2 Ins Del

Invoice #	Date	RxNum	PatName	Comment	TaxType	Amount

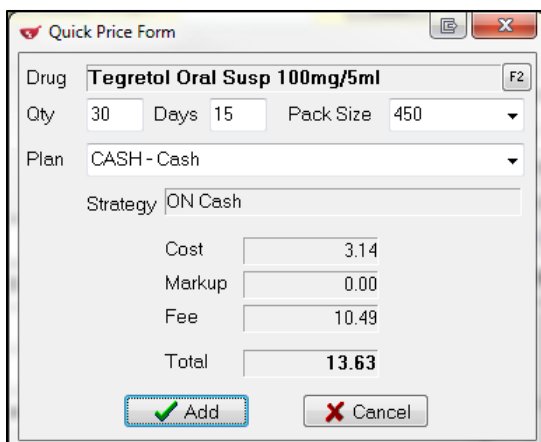
- To manually add an item to the invoice, click **Ins** or press the **Insert** key on your keyboard.



- Complete the **AR Detail Form**. The value entered in the **Amount** field will be charged to the patient's account. If you are adding a non-prescription item, enter a description of the item in the **Comment** field. Click **Save**. The item will be added to the invoice.



- If the item is a dispensable drug, click **Price a Drug**. The **(Drp Search)** form will appear. Search for and select a drug. Enter a **Qty** and **Days** supply in the **Quick Price Form** and click **Calculate**. Pricing information will populate.



- Click **Add**. Click **Save** to close the **AR Detail Form**. The item will be added to the invoice.

Deleting an Invoice

1. Call up the patient's AR profile.
2. Click the **Invoices** tab.
3. Select an invoice with an 'Open' status and click **Del** or press the **Delete** key on your keyboard.

AR Profile

Account # Inactive Current Credit Limit

Billed To 30 Days Total

Filter By: Waive Finance Charges 60 Days Unposted Amount

Duplicate Statement 90 Days Effective Total

Items (2)

Status	Invoice #	Date	Subtotal	GST	Total	Paid	Balance
Open	18	22/06/2016	\$2.00	\$0.00	\$2.00	\$0.00	\$2.00
Posted	3	22/06/2016	\$15.63	\$0.00	\$15.63	\$10.00	\$5.63

4. A prompt will appear asking if you are sure you want to delete the invoice. Select **Yes**. The invoice will be removed from the account.

Are you sure?

Are you sure you want to delete this Invoice?

NOTE: Only invoices with a status of 'Open' can be deleted. If you attempt to delete an invoice with any other status, the following warning will appear:

You can't delete an Invoice unless it is open

Editing an Invoice

1. Call up the patient's AR profile.
2. Click the **Invoices** tab.
3. Select an invoice and click **F2** or press the **F2** key on your keyboard.

AR Profile

Account # 1234567 Inactive Current \$5.63 Credit Limit \$500.00

Billed To Patient, Test 30 Days \$0.00 Total \$5.63

Filter By: Current Activity Waive Finance Charges 60 Days \$0.00 Unposted Amount \$2.00

Duplicate Statement 90 Days \$0.00 Effective Total \$7.63

Detail Invoices Payments Comments Ctrl

Items (2) F2 Ins Del

Status	Invoice #	Date	Subtotal	GST	Total	Paid	Balance
Open	18	22/06/2016	\$2.00	\$0.00	\$2.00	\$0.00	\$2.00
Posted	3	22/06/2016	\$15.63	\$0.00	\$15.63	\$10.00	\$5.63

4. The **AR Invoice Form** will appear. If the invoice has a status of 'Open', you can add, delete, or edit items from the invoice. If the invoice has any other status, the information displayed in the **AR Invoice Form** will be read-only.

AR Invoice Form

Invoice # SubTotal Total

Date 22/06/2016 GST Paid

Status Balance

AR Detail (1) F2 Ins Del

Invoice #	Date	RxNum	PatName	Comment	TaxType	Amount
18	22/06/2016	1	Patient, Test	Tooth brush	None	\$2.00

5. Click **OK** or **Cancel** to return to the AR profile.

Posting an Invoice