

# Front Desk 2018

## Practice Management System

### Front Desk – Accounting Update (January 2018)

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### Accounting Update – Summary

This document will guide you through the important accounting changes in Front Desk 2018 – Practice Management System Version 18.1.0.

This release includes significant changes to the billing engine of Front Desk and will change how you manage transactions, statements and invoices in the future. These changes also act as the foundation for integration with third-party accounting packages such as Xero.

### Quick Guide

#### General:

- After upgrading to the new accounting system, you cannot return to the old accounting system.
- Outstanding invoices generated using the old accounting system can still be searched and paid in Front Desk.
- The new system is optimised for a paperless environment. Emailing invoices and statements is highly recommended.
- Email templates can be assigned for the emailing of receipts, invoices and statements.

#### Invoices:

- Invoices are raised automatically at the time of billing or receipting.
- Invoice numbers are consistent in the items / transactions they represent. The same items will never appear on multiple invoices.
- Invoices not previously issued or paid can be consolidated automatically.
- Unique invoices are always displayed on separate pages.
- Upon upgrading Front Desk, all past invoices will be marked as issued.

#### Statements:

- Statements are a summary of outstanding invoices.
- There is an option to include invoice copies as additional pages at the end of the statement.
- Statements that include invoice copies are intended to be emailed rather than printed, as they may contain numerous pages of information.
- Statements are best issued periodically as a summary of outstanding invoices within a range.

#### Patient File:

- An email field has been added to the Billing Details tab, which is used when emailing receipts, invoices or statements to third-parties.
- The Statement/Invoice preference is also set from the Billing Details tab, which determines whether to print or email invoices/statements for this patient.
- Invoice override settings can be set per account from the Billing Details tab.

#### Bulk Emailing:

- Invoices and statements can now be emailed in bulk.
- The Smartsoft email gateway is available to assist in sending bulk statements and invoices, should you have email restrictions or limitations with your email provider when sending large numbers of emails.

## Working with Invoices

**Invoices** are now raised automatically at the time of billing or receipting.

Whether you are billing an individual item or multiple items together, a single **invoice number** will be generated to represent the transaction and associated billed items.

**Billing**

Patient: Mr John Smith  
 Practitioner: Dr Robert Smith  
 Date: 03/07/2017  
 Item Code: P-2  
 Description: Pillow- Standard Soft

Account: Primary  
 Fee: \$28.00  
 Reduction: \$0.00  
 Net Fee: \$28.00  
 Payment: 0.00

Date	Item	Description	Prac	Net Fee	Payment
03/07/2017	C005	Standard Consultation	Bob	\$75.00	\$0.00
03/07/2017	M-001	Massage- 40 Mins.	Bob	\$45.00	\$0.00
03/07/2017	P-2	Pillow- Standard Soft	Bob	\$28.00	\$0.00

Totals: \$148.00

Accept Unallocated Payment to practitioner: Dr Robert Smith, unallocated amount: \$0.00

Online Claiming:  
☐ Medicare PCI  
☐ Bulk Bill  
☐ DVA Claim

Print:  
☐ Email: ☒ Send now using template (Receipt Template)  
☐ Edit before sending

Buttons: Help, OK, Cancel

In this example, we are billing three items in a single transaction, which will be represented by invoice number 68305.

Date	Item	Description	Prac	Net Fee	Payment
03/07/2017	C005	Standard Consultation	Bob	\$75.00	\$0.00
03/07/2017	M-001	Massage- 40 Mins.	Bob	\$45.00	\$0.00
03/07/2017	P-2	Pillow- Standard Soft	Bob	\$28.00	\$0.00
Invoice Number: 68305					
Totals				\$148.00	\$0.00

These billed items will never appear on another invoice and never be represented with a different invoice number.

### Reprinting invoices

Select the **Transactions** tab within the patient file.

You will notice there is no longer an **Invoices** button; this is because invoices are now being generated automatically at the time of billing.

The screenshot shows the 'Patient - Mr John Smith' window with the 'Transactions' tab selected. The window displays a table of transactions with columns: Invoice ID, Service Date, Prac, Debit, Credit, Owing, and Description. The 'Reprint' button is highlighted with a red box.

Invoice ID	Service Date	Prac	Debit	Credit	Owing	Description
68305	03/07/2017	Bob	\$75.00		\$75.00	Standard Consul
68305	03/07/2017	Bob	\$45.00		\$45.00	Massage- 40 Min
68305	03/07/2017	Bob	\$28.00		\$28.00	Pillow- Standard

Buttons on the right: Close, Delete Item, Edit Item, **Reprint**, Statement, Trans. Log, Write Off, Refund, Export, Help.

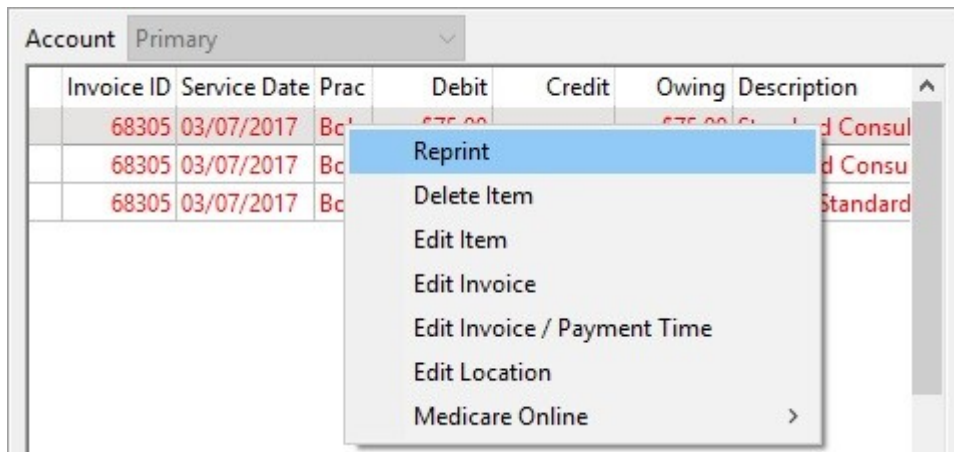
Summary section: Primary, 90+ Days (\$148.00), 60 Days (\$0.00), 30 Days (\$0.00), Current (\$0.00), Balance (\$148.00).

Invoices can be reprinted by selecting the **Reprint** option.

The screenshot shows the 'Reprint Invoices' dialog box. It includes options for selecting the account, invoice type, and filter. The 'Reprint' button is highlighted with a red box.

Buttons on the right: Close, Print, Preview, Email, PDF, Log, Help.

Or by right-clicking the selected transaction.



Users can select **All Outstanding Invoices**, **Outstanding Invoices** or **All Invoices** in a date range, **Reprint Invoices Containing Selected Transactions** or **Reprint Invoice No.**

Invoice Type

☒ All Outstanding Invoices

☐ Outstanding Invoices between 01/01/2018 and 07/01/2018

☐ All Invoices between 01/01/2018 and 07/01/2018

☐ Reprint Invoices Containing Selected Transactions

☐ Only include selected items

☐ Include items from different invoices on a single document

☐ Reprint Invoice No. 68520 08/01/18 01:03pm \$148.00

☒ Outstanding Only

Note **Reprint Invoices Containing Selected Transactions** will include all items contained in the selected invoice(s).

☒ Reprint Invoices Containing Selected Transactions

☐ Only include selected items

☐ Include items from different invoices on a single document

**Only include selected items** can be enabled to include only the items highlighted on the **Transactions** window. This will reprint the selection using the original invoice number, noting that not all items have been included on the reprint.

☒ Reprint Invoices Containing Selected Transactions

☒ Only include selected items

☐ Include items from different invoices on a single document

**Include items from different invoices on a single document** allows users to reprint their exact selection to a single document, removing all associated invoice numbers.

☒ Reprint Invoices Containing Selected Transactions

☒ Only include selected items

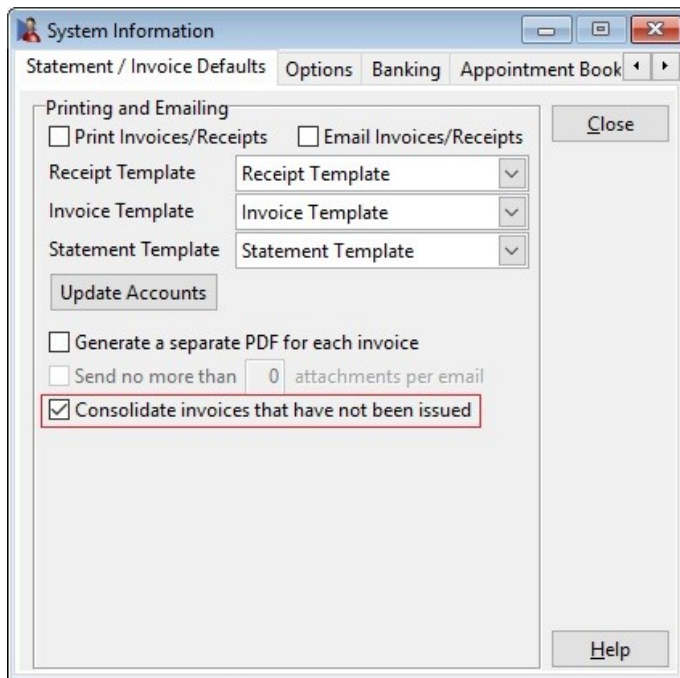
☒ Include items from different invoices on a single document

### Consolidating invoices

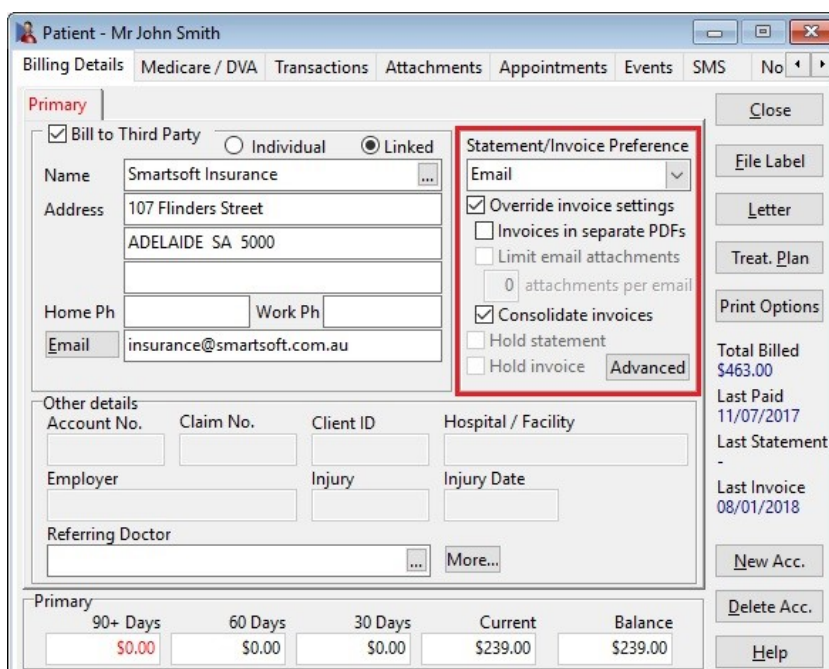
**Invoices** that have not previously been consolidated or issued will be consolidated automatically when using the **Preview, Print, Email** or **PDF** options.

An invoice is considered issued when it has been printed, emailed or exported to PDF. At the time of upgrading to Front Desk version 18.1 or above, all pre-existing transactions and invoices will be marked as issued.

Invoice consolidation can be disabled globally from the **Statement / Invoice Defaults** tab of **System Information**.



Alternatively, consolidation can be managed per account from the **Billing Details** tab of the patient file. Preferences set on the account will override the global settings of System Information.





The consolidation of Invoices is triggered from the **Transactions** tab of the patient file, or when invoicing in bulk from **Statements / Invoices**.

In the example below, John Smith has three separate invoices currently using the **Invoice ID's** of 68514, 68515 and 68516.

Invoice ID	Service Date	Prac	Debit	Credit	Owing	Description
68514	01/01/2018	Bob	\$52.00		\$52.00	Initial Consultati
68515	03/01/2018	Bob	\$75.00		\$75.00	Standard Consul
68516	08/01/2018	Bob	\$37.00		\$37.00	Other Consultati

Primary

90+ Days: \$0.00, 60 Days: \$0.00, 30 Days: \$0.00, Current: \$164.00, Balance: \$164.00

When scrolling to the right, the **Invoice Issued** column shows these invoices have not previously been issued. This means the invoices can be consolidated into a single document.

Type	Invoice / Payment Time	Invoice Issued	Location
Invoice	08/01/2018 10:26 AM	<input type="checkbox"/>	Adelaide
Invoice	08/01/2018 10:26 AM	<input type="checkbox"/>	Adelaide
Invoice	08/01/2018 10:27 AM	<input type="checkbox"/>	Adelaide

To consolidate these invoices, click **Reprint**.

Reprint

This will display the **Reprint** window, where the corresponding **Print**, **Preview**, **Email** and **PDF** options will trigger the consolidation of eligible invoices.

Please note invoices that have previously been **Issued**, **Consolidated** or include **Payments** will not be consolidated into a new invoice number, as we assume they have already been provided to a payer or third party.

Consolidation is based on your selections in this window.

With **All Outstanding Invoices**, **Outstanding Invoices**, **All Invoices** or **Reprint Invoices Containing Selected Transactions** selected, clicking **Print**, **Preview**, **Email** or **PDF** will consolidate the invoices found.

Following this example, if I **Preview** the selection we can see the transactions have now been consolidated into a single invoice, using the unique invoice number **68517**.

Printed: 8-Jan-2018

Tax Invoice # 68517

ABN 123-456-789

Date	Item	Description	Payment	Fee
01/01/2018	C002	Initial Consultation		\$52.00
03/01/2018	C005	Standard Consultation		\$75.00
08/01/2018	C100	Other Consultation		\$37.00
No GST included.				

Returning to the **Transactions** tab, we can see the **Invoice ID** has updated to reflect the new invoice number.

Invoice ID	Service Date	Prac	Debit	Credit	Owing	Description
68517	01/01/2018	Bob	\$52.00		\$52.00	Initial Consultati
68517	03/01/2018	Bob	\$75.00		\$75.00	Standard Consul
68517	08/01/2018	Bob	\$37.00		\$37.00	Other Consultati

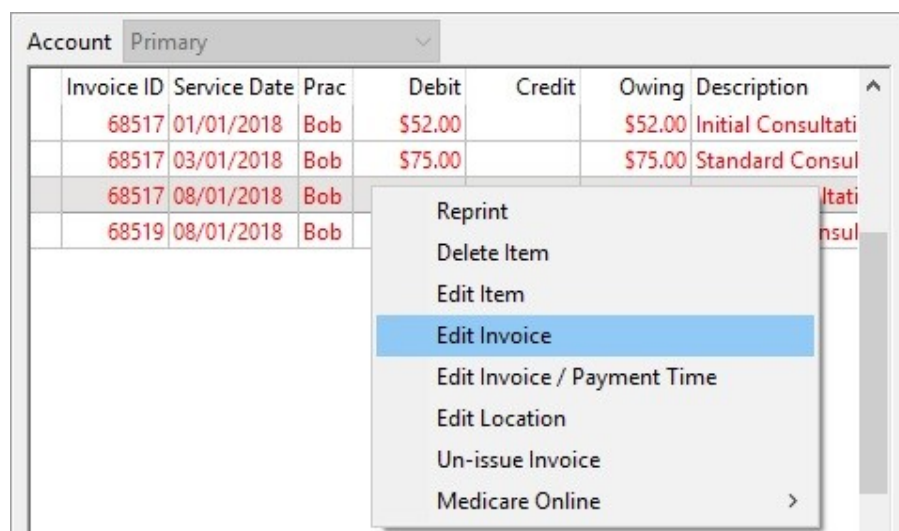
If further changes need to be made to the invoice, right-click the transaction line and select **Edit Invoice**.

The **Un-issue Invoice** option can be used to remove the *issued* status to allow consolidation where required.



### Editing invoices

An existing invoice can be edited by right-clicking the transaction line and selecting **Edit Invoice**.



This will display the **Billing** window, which can be used to add or remove items.

Billing - Outstanding Amount \$239.00

Patient: Mr John Smith Account: Primary

Practitioner: Dr Robert Smith - Adelaide

Date: 08/01/2018 Fee: \$37.00

Item Code: C100 <All Schedules> Reduction: \$0.00

Description: Other Consultation Net Fee: \$37.00 Include GST ☐

Payment: 0.00 Add

Date	Item	Description	Prac	Net Fee	Payment
01/01/2018	C002	Initial Consultation	Bob	\$52.00	\$0.00
03/01/2018	C005	Standard Consultation	Bob	\$75.00	\$0.00
08/01/2018	C100	Other Consultation	Bob	\$37.00	\$0.00

☒ GST Item Totals \$164.00 \$0.00

☐ Accept Unallocated Payment to practitioner Dr Robert Smith - A unallocated amount

Online Claiming

☐ Medicare PCI

☐ Bulk Bill

☐ DVA Claim

☐ Print

☐ Email ☒ Send now using template Invoice Template ☐ Edit before sending

Help OK Cancel

As per the usual billing process, double-clicking an existing transaction line will remove it from the invoice. Items with a payment cannot be removed in this way and must be deleted from the transactions tab.

Items can be added to the invoice by entering the desired date, item code, fee and payment and clicking **Add**.

## Working with Statements

A **Statement** is a summary of outstanding invoices.

Typically, a statement will be sent periodically to clients with multiple outstanding invoices or large accounts, which they can then use to make appropriate payments.

## Creating statements

Select the **Statement** button to begin.

Statements can be generated for:

- **All Outstanding Invoices**
- **Outstanding Invoices** or **All Invoices** within a date range
- or by **Invoices Containing Selected Transaction**.

Additional statement options are also available:

## Print itemised invoices on statement.

Selecting this option will itemise the items on each invoice.

Printed: 6-Oct-2017

## STATEMENT No. 10254

ABN 123-456-789

Invoice #	Date	Provider No	Item	Description	Invoice Amount	Payments	Balance
68320	03/07/2017	A1234567	C005	Standard Consultation	\$75.00	\$0.00	\$75.00
	03/07/2017	A1234567	M-001	Massage- 40 Mins.	\$45.00	\$0.00	\$45.00
	03/07/2017	A1234567	P-2	Pillow- Standard Soft	\$28.00	\$0.00	\$28.00
					<b>\$148.00</b>	<b>\$0.00</b>	<b>\$148.00</b>
68321	25/06/2017	A1234567	C005	Standard Consultation	\$75.00	\$0.00	\$75.00
					<b>\$75.00</b>	<b>\$0.00</b>	<b>\$75.00</b>
68322	24/05/2017	A1234567	C002	Initial Consultation	\$52.00	\$0.00	\$52.00
					<b>\$52.00</b>	<b>\$0.00</b>	<b>\$52.00</b>

## FRONT DESK 2018 – WORKING WITH STATEMENTS

When deselected, the statement will only show invoice totals.

Printed: 6-Oct-2017

### STATEMENT No. 10255

ABN 123-456-789

Invoice #	Date	Invoice Amount	Payments	Balance
68320	06/10/2017	\$148.00	\$0.00	\$148.00
68321	06/10/2017	\$75.00	\$0.00	\$75.00
68322	06/10/2017	\$52.00	\$0.00	\$52.00

[Print copies of invoices.](#)

Selecting this option will print copies of each invoice listed on the statement.

The invoices will appear as additional pages on the statement document.



Printed: 3-Jul-2017

### Tax Invoice # 68305

ABN 123-456-789

Date	Item	Description	Payment	Fee
03/07/2017	C005	Standard Consultation		\$75.00
03/07/2017	M-001	Massage- 40 Mins.		\$45.00
03/07/2017	P-2	Pillow- Standard Soft		\$28.00
No GST included.				

[Include unallocated payments \(credits\).](#)

Select this option to include unallocated payments on the statement.

Printed: 6-Oct-2017

### STATEMENT No. 10256

ABN 123-456-789

Invoice #	Date	Provider No	Item	Description	Invoice Amount	Payments	Balance
68320	03/07/2017	A1234567	C005	Standard Consultation	\$75.00	\$0.00	\$75.00
	03/07/2017	A1234567	M-001	Massage- 40 Mins.	\$45.00	\$0.00	\$45.00
	03/07/2017	A1234567	P-2	Pillow- Standard Soft	\$28.00	\$0.00	\$28.00
					<b>\$148.00</b>	<b>\$0.00</b>	<b>\$148.00</b>
68321	25/06/2017	A1234567	C005	Standard Consultation	\$75.00	\$0.00	\$75.00
					<b>\$75.00</b>	<b>\$0.00</b>	<b>\$75.00</b>
68322	24/05/2017	A1234567	C002	Initial Consultation	\$52.00	\$0.00	\$52.00
					<b>\$52.00</b>	<b>\$0.00</b>	<b>\$52.00</b>
68323	06/10/2017	A1234567		Unallocated Payment	\$0.00	\$150.00	(\$150.00)
					<b>\$0.00</b>	<b>\$150.00</b>	<b>(\$150.00)</b>

With your statement options selected, you can now **Print**, **Preview**, **Email** or **PDF** the statement.

Previously created statements are available under the **Reprint Statement** menu.

☒ **Reprint Statement**

No.10462 (04/07/2017) \$125.00

The **Log** can also be accessed to view all statement activity within the patient file.

Statement / Invoice Log							
Date/Time	Activity	Statement No.	Statement Date	Balance	Itemised	Invoices	User
04/07/2017 12:02 pm	Email	10463	04/07/2017	\$73.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Admin
04/07/2017 11:57 am	PDF	10462	04/07/2017	\$125.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Admin

## Changes to the Patient File

A number of changes have been made to the patient file to accommodate the new accounting system and features.

Firstly, the **Billing Details** tab has been redesigned to include an **Email** field for third parties. If **Bill to Third Party** is enabled and an email address entered, this email will be used when sending any receipts, invoices or statements for this account.

**Patient - Mr John Smith**

Billing Details | Medicare / DVA | Transactions | Attachments | Appointments | Events | SMS | No

**Primary**

☒ Bill to Third Party ☐ Individual ☒ Linked

Name: Smartsoft Insurance

Address: 107 Flinders Street  
ADELAIDE SA 5000

Home Ph: Work Ph:

Email: insurance@smartsoft.com.au

**Statement/Invoice Preference**  
Email

☐ Override invoice settings

☐ Invoices in separate PDFs

☐ Limit email attachments  
0 attachments per email

☐ Consolidate invoices

☐ Hold statement

☐ Hold invoice **Advanced**

**Other details**

Account No. Claim No. Client ID Hospital / Facility

Employer Injury Injury Date

Referring Doctor

**Primary**

90+ Days	60 Days	30 Days	Current	Balance
\$0.00	\$0.00	\$0.00	\$239.00	\$239.00

Total Billed \$463.00  
Last Paid 11/07/2017  
Last Statement -  
Last Invoice 08/01/2018

New Acc. Delete Acc. Help

The **Statement/Invoice Preference** drop-down is then used to set the patient's preference for receiving statements and invoices – whether they should be printed, emailed or both.

**Statement/Invoice Preference**

Email

Print

Email

Print & Email

The preference selected here will determine the action taken when generating bulk statements and invoices. This can be adjusted for all patients from the **Statements / Invoices** area.

Additional **Override invoice settings** can also be applied to the account.

**Statement/Invoice Preference**

Email

☒ Override invoice settings

☒ Invoices in separate PDFs

☒ Limit email attachments  
1 attachments per email

☒ Consolidate invoices

☐ Hold statement

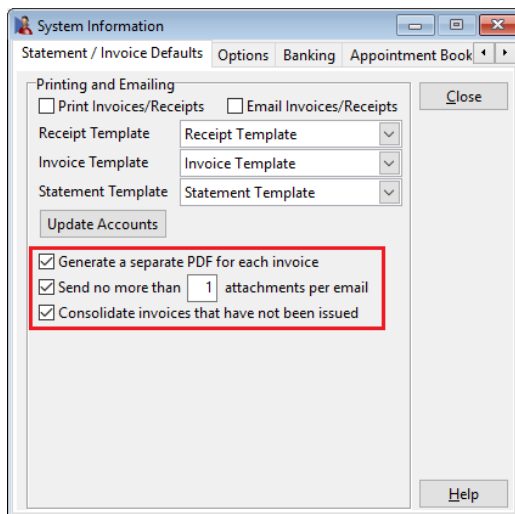
☐ Hold invoice **Advanced**

**Invoices in separate PDFs** will generate a separate PDF for each invoice, rather than append invoices as additional pages in a single document.

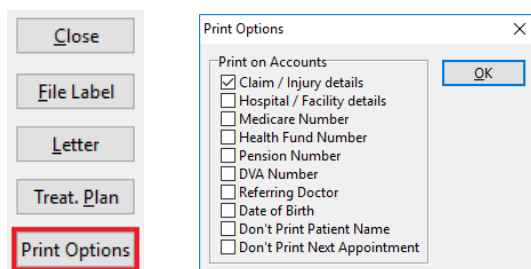
**Limit email attachments** will restrict the total number of attachments per email sent. This is used in conjunction with separate PDFs, allowing users to send a maximum number of attachments per email if required.

**Consolidate invoices** allows users to override the global Statement / Invoice Defaults for the account. For example, if consolidation is *enabled* globally, selecting this option would allow consolidation to be *disabled* for this account individually.

These settings can be set globally from the **Statement / Invoice Defaults** tab of **System Information**.



**Print on Account** options are now available by clicking the **Print Options** button.



Minor layout changes have also been made to the **Billing** screen and the **Transaction** tab.

### Bulk Emailing Statements & Invoices

**Statements** and **Invoices** can now be emailed in bulk.

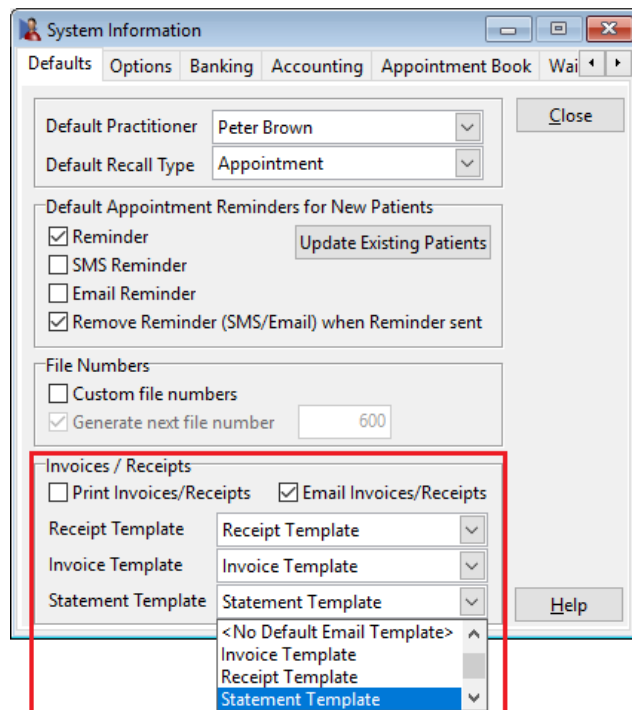
To begin, we first need to select the email template to be used for bulk emailing.

If a template has not been selected, a standard email message built into Front Desk will be used.

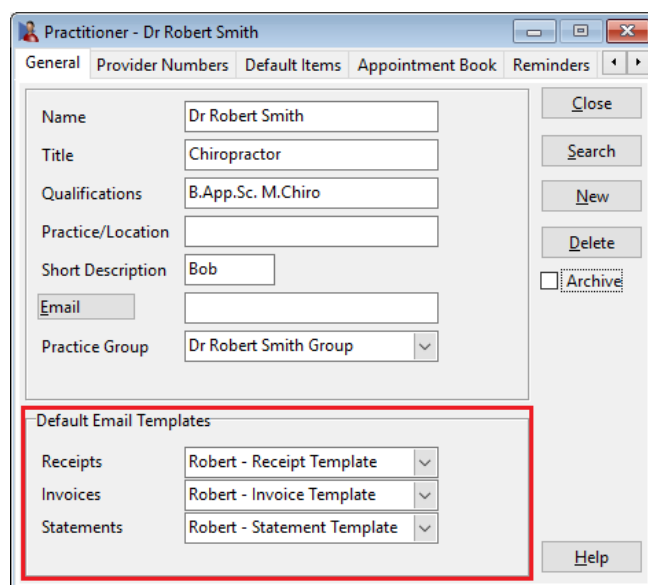
Select the **Defaults** tab in **System Information**.

Using the **Receipt Template**, **Invoice Template** and **Statement Template** drop-downs, select an appropriate email template to use across your practice.

New email templates can be created from **System ► Standard Messages ► Standard emails**.



If required, you can also set practitioner specific templates from within each **Practitioner** file.

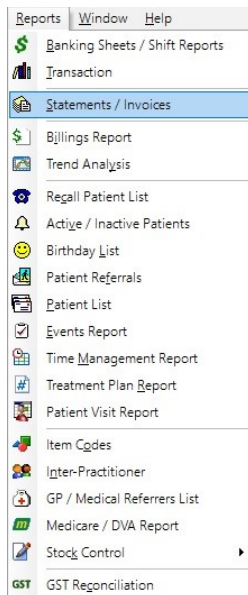


Templates set at the practitioner level will be prioritised over those in system information.



With your email templates selected you are now ready to bulk email statements and invoices.

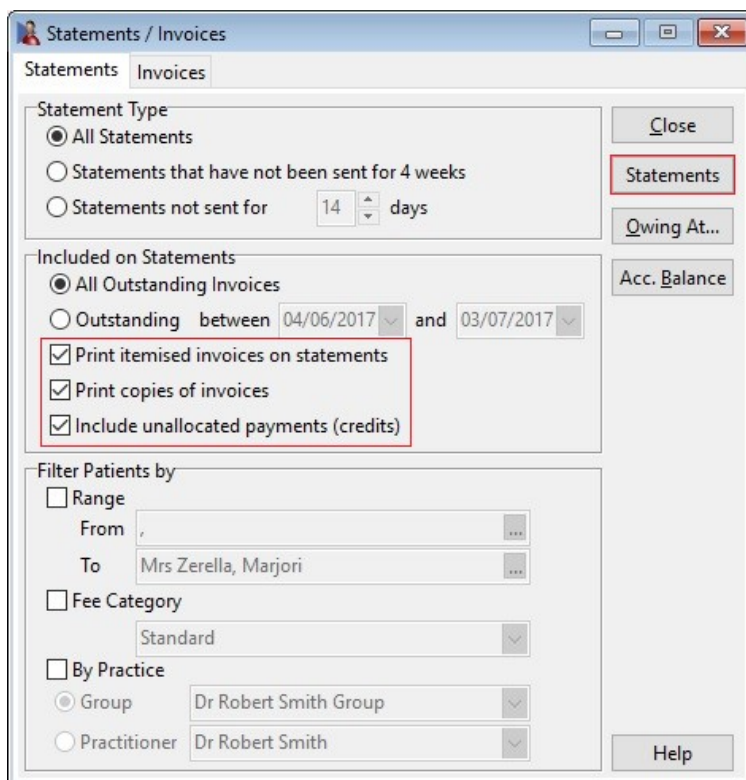
Open **Statements / Invoices** from the **Reports** menu.



### Email, Print or PDF Statements

With the **Statements / Invoices** window open, you will notice the **Statements** tab now includes the additional statement options discussed previously (itemised invoices, print copies, include unallocated).

After confirming your preferences click the **Statements** button.



The **Statement Selection** window will appear, summarising all patient files with an outstanding amount.

## FRONT DESK 2018 – BULK EMAILING STATEMENTS & INVOICES

Statement Selection

Process	Action	Name	Account	Address	Email Address	>90 Days	60 Days	30 Days	Current	Total
<input checked="" type="checkbox"/>	Email	Mr Lindsay Abbott	Primary	31 Penno Parade N	Abbott786@smartsoft.com.au	\$0.00	\$0.00	\$0.00	\$56.00	\$56.00
<input checked="" type="checkbox"/>	Email	Ms Dianne Adams	Primary	PO Box 90 Kent To	Adams974@smartsoft.com.au	\$0.00	\$0.00	\$0.00	\$32.00	\$32.00
<input checked="" type="checkbox"/>	Email	Ms Corrine Adcock	Primary	109 Whites Road S	Adcock2050@smartsoft.com.au	\$0.00	\$0.00	\$0.00	\$32.00	\$32.00
<input checked="" type="checkbox"/>	Print	Mst Shannon Alande	Primary	3 Trim Drive Ridgel		\$0.00	\$0.00	\$180.00	\$0.00	\$180.00
<input checked="" type="checkbox"/>	Email	Mrs Antoinette Alexa	Primary	11 Berry Fry Avenu	ant@general.com.au	\$43.00	\$0.00	\$0.00	\$189.00	\$232.00
<input checked="" type="checkbox"/>	Email	Mr Phil Alexander	Primary	100 The Parade No	phil@smartsoft.com.au	\$28.00	\$0.00	\$0.00	\$0.00	\$28.00
<input checked="" type="checkbox"/>	Email	Miss Natalie Allan	Primary	54 Bakewell Road E	Allan552@smartsoft.com.au	\$0.00	\$0.00	\$0.00	\$50.00	\$50.00
<input checked="" type="checkbox"/>	Email	Mrs Delrene Allen	Primary	67 Orange Grove C	andrew@smartsoft.com.au	\$0.00	\$0.00	\$0.00	\$156.00	\$156.00
<input checked="" type="checkbox"/>	Email	Mr Peter Ambaras	Primary	143 Second Ave Rc	Ambaras2161@smartsoft.com	\$0.00	\$0.00	\$0.00	\$50.00	\$50.00
<input checked="" type="checkbox"/>	Email	Miss Bridie Fitzgerald	Primary	SGIC GPO Box 312	Fitzgerald182@smartsoft.com	\$0.00	\$0.00	\$0.00	\$30.00	\$30.00
<input checked="" type="checkbox"/>	Email	Mrs Ruth Hales	Primary	14 Greenwood Driv	Hales717@smartsoft.com.au	\$24.00	\$0.00	\$0.00	\$96.00	\$120.00
<input checked="" type="checkbox"/>	Print	Mr Denis Holmes	Primary	PO Box 19 Uraidla		\$0.00	\$0.00	\$0.00	\$1,000.00	\$1,000.00
<input checked="" type="checkbox"/>	Email	Mrs Melinda Keelan	Primary	58 Ashbrook Aveni	Keelan388@smartsoft.com.au	\$0.00	\$0.00	\$0.00	\$240.00	\$240.00
<input checked="" type="checkbox"/>	Email	Mr Joe Largos	Primary	214 Honor Street N	test3256@smartsoft.com.au	\$32.00	\$0.00	\$0.00	\$64.00	\$96.00
<input checked="" type="checkbox"/>	Print	Remy Lebeau	Primary	1407 Graymalkin L		\$0.00	\$0.00	\$0.00	(\$48.00)	(\$48.00)
<input checked="" type="checkbox"/>	Email	Mr Adrian Lennell	Primary	2 Cirtine Street Ho	Lennell267@smartsoft.com.au	\$0.00	\$0.00	\$0.00	\$100.00	\$100.00
<input checked="" type="checkbox"/>	Email	Mr Karl Lowry	Primary	2 Shepherdson Ro	andrew@smartsoft.com.au	\$0.00	\$0.00	\$0.00	\$32.00	\$32.00
Total						\$149.00	\$0.00	\$232.00	\$1,985.10	\$2,366.10

Close All None Process Print Email PDF Labels Summary Summary Defaults Help

Note this window now includes an **Action** column.

This represents the patients preferred method of receiving statements and invoices.

Process	Action	Name	Account	Address
<input checked="" type="checkbox"/>	Email	Mr Lindsay Abbott	Primary	31 Penno Parade N
<input checked="" type="checkbox"/>	Email	Ms Dianne Adams	Primary	PO Box 90 Kent To
<input checked="" type="checkbox"/>	Email	Ms Corrine Adcock	Primary	109 Whites Road S
<input checked="" type="checkbox"/>	Print	Mst Shannon Alande	Primary	3 Trim Drive Ridgel

The default delivery method can be set for all patients by selecting the **Defaults** button.

**Please note that this will override all patient's statement/invoice preference permanently, and not just for this statement run.**

Statement/Invoice Delivery Default

☐ Print all statements/invoices  
☒ Email all statements/invoices (default to Print for patients with no email address)  
☐ Print and Email all statements/invoices

OK Cancel

Alternatively, the patients individual statement delivery preference can be set on the **Billing Details** tab of the patient file.

Patient - Mr John Smith

Billing Details Medicare / DVA Transactions Attachments Appointments Events SMS No

Primary

☒ Bill to Third Party  
☐ Individual  
☒ Linked

Name Smartsoft Insurance  
 Address 107 Flinders Street  
 ADELAIDE SA 5000  
 Home Ph  
 Work Ph  
 Email insurance@smartsoft.com.au

Other details

Account No.  
 Claim No.  
 Client ID  
 Hospital / Facility  
 Employer  
 Injury  
 Injury Date  
 Referring Doctor

Statement/Invoice Preference

☒ Email  
☐ Override invoice settings  
☐ Invoices in separate PDFs  
☐ Limit email attachments  
☐ 0 attachments per email  
☐ Consolidate invoices  
☐ Hold statement  
☐ Hold invoice

Advanced

Total Billed \$463.00  
 Last Paid 11/07/2017  
 Last Statement  
 Last Invoice 08/01/2018

New Acc.  
 Delete Acc.  
 Help

Primary  
 90+ Days \$0.00  
 60 Days \$0.00  
 30 Days \$0.00  
 Current \$239.00  
 Balance \$239.00

## FRONT DESK 2018 – BULK EMAILING STATEMENTS & INVOICES

After confirming your patient selection, you are now ready to generate statements in bulk.

To **Print** or **Email** all statements based on the patient's preference, click the **Process** button.

Process

To print all statements selected for print, click the **Print** button.

Print

To send all statements selected for email, click the **Email** button.

Email

### Email, Print or PDF Invoices

With the **Statements / Invoices** window open, select the **Invoices** tab.

Click the **Invoices** button to load the **Invoice Selection** window. This window summarises all patients with an outstanding invoice.

Invoice Selection								
Process	Action	Name	Address	Email	Total Invoices	Total		
<input checked="" type="checkbox"/>	Email	Mr Lindsay Abbott	31 Penno Parade North Belair SA	Abbott786	2	\$56.00		
<input checked="" type="checkbox"/>	Email	Ms Dianne Adams	PO Box 90 Kent Town SA 5071	andrew@smartsoft.com.au	3	\$249.00		
<input checked="" type="checkbox"/>	Email	Ms Corrine Adcock	109 Whites Road Salisbury North	Adcock2050@smartsoft.com.au	1	\$32.00		
<input checked="" type="checkbox"/>	Email	Mst Shannon Alander	3 Trim Drive Ridgehaven SA 5097	andrew@smartsoft.com.au	5	\$869.00		
<input checked="" type="checkbox"/>	Email	Mr Phil Alexander	100 The Parade Norwood SA 5007	phil@smartsoft.com.au	1	\$28.00		
<input checked="" type="checkbox"/>	Email	Miss Natalie Allan	54 Bakewell Road Evandale SA 5061	Allan552@smartsoft.com.au	1	\$50.00		
<input checked="" type="checkbox"/>	Email	Mrs Delrene Allen	67 Orange Grove Circuit Dernanc	andrew@smartsoft.com.au	3	\$156.00		
<input checked="" type="checkbox"/>	Email	Mr David Allison	21 Howe Court Salisbury East SA	Allison553@smartsoft.com.au	1	\$100.00		
<input checked="" type="checkbox"/>	Email	Miss Emily Alm	10 Moorfield Mews Aberfoyle Par	andrew@smartsoft.com.au	2	\$275.00		
<input checked="" type="checkbox"/>	Email	Mr Peter Ambaras	143 Second Ave Royston Park S A	Ambaras2161@smartsoft.com.au	1	\$50.00		
<input checked="" type="checkbox"/>	Email	Mrs Sharon Austin	47 South Road Newton SA 5074	Austin554@smartsoft.com.au	2	\$375.00		
<input checked="" type="checkbox"/>	Email	Miss Bridie Fitzgerald	SGIC GPO Box 312 ADELAIDE S A	Fitzgerald182@smartsoft.com.au	1	\$30.00		
<input checked="" type="checkbox"/>	Email	Mrs Ruth Hales	14 Greenwood Drive St Agnes SA	Hales717@smartsoft.com.au	4	\$120.00		
<input checked="" type="checkbox"/>	Print	Mr Denis Holmes	PO Box 19 Uraidla SA 5142		1	\$1,000.00		
<input checked="" type="checkbox"/>	Email	Mrs Melinda Keelan	58 Ashbrook Avenue Payneham	Keelan388@smartsoft.com.au	3	\$240.00		
<input checked="" type="checkbox"/>	Email	Mr Joe Largos	214 Honor Street MINGARY SA 5008	test3256@smartsoft.com.au	3	\$196.00		
						Total	\$10,091.10	

The **Invoice Selection** window now includes an **Action** column which represents the patients preferred method of receiving statements and invoices.

An additional column has also been added to show the **Total Invoices** each patient has outstanding.

Invoice Selection								
Process	Action	Name	Address	Email	Total Invoices	Total		
<input checked="" type="checkbox"/>	Email	Mr Lindsay Abbott	31 Penno Parade North Belair SA	Abbott786	2	\$56.00		
<input checked="" type="checkbox"/>	Email	Ms Dianne Adams	PO Box 90 Kent Town SA 5071	andrew@smartsoft.com.au	3	\$249.00		
<input checked="" type="checkbox"/>	Email	Ms Corrine Adcock	109 Whites Road Salisbury North	Adcock2050@smartsoft.com.au	1	\$32.00		
<input checked="" type="checkbox"/>	Email	Mst Shannon Alander	3 Trim Drive Ridgehaven SA 5097	andrew@smartsoft.com.au	5	\$869.00		
<input checked="" type="checkbox"/>	Email	Mr Phil Alexander	100 The Parade Norwood SA 5007	phil@smartsoft.com.au	1	\$28.00		

After confirming your patient selection, you are now ready to generate invoices in bulk.

To **Print** or **Email** all invoices based on the patient's preference, click the **Process** button.

Process

To print all invoices selected for print, click the **Print** button.

Print

To send all invoices selected for email, click the **Email** button.

Email

### Using the Smartsoft Email Gateway

To assist with the bulk emailing of statements and invoices, we have added the ability to **Send Statements/Invoices via the Smartsoft email gateway**.

This option can be used if your current mail provider has difficulty sending emails or attachments in bulk, and can be enabled from the **Email** tab of **System Information**.

The screenshot shows the 'System Information' dialog box with the 'Email' tab selected. The 'Outgoing mail' section has three radio buttons: 'MAPI (e.g. Outlook)' (selected), 'SMTP (Direct Email)', and 'Front Desk acting as a mail server (SMTP Relay)'. Below this, the 'Smartsoft Email Gateway' section is highlighted with a red box. It contains two tabs: 'Statements/Invoices' (selected) and 'Patient Booking Gateway'. A checkbox labeled 'Send Statements/Invoices via Smartsoft email gateway' is checked. Below the checkbox are two text fields: 'Sender Name' with the value 'Smartsoft Practice' and 'Reply Email' with the value 'accounts@smartsoft.com.'. At the bottom, the 'Settings' section has a 'Default format' dropdown menu set to 'HTML'. A 'Close' button is in the top right, and a 'Help' button is in the bottom right.

Please note statements and invoices sent using this method will use the sender email [client@frontdesk.smartsoft.com.au](mailto:client@frontdesk.smartsoft.com.au).

The **Sender Name** and **Reply Email** will be as specified by the user.

### Frequently Asked Questions

#### **What should I do as a user to get the most from these changes?**

- Familiarise yourself with the revised invoice and statement functionality.
- Enter valid email addresses for patients and third-party payers.
- Create and assign email templates for the emailing of invoices and statements (optional).
- Begin emailing your invoices and statements.

#### **Why have these changes been made?**

These changes bring the Front Desk software in-line with best practice accounting standards and provides a path for future integration with popular accounting packages such as Xero and MYOB Cloud products.

#### **Why can't I continue using the original accounting system?**

We have committed ourselves to the improvement of the Front Desk system. Due to the significant changes involved in this revision, the older accounts receivable system has now been deprecated and will not be supported in the future.

#### **How does this change my billing process?**

Invoices are now automatically generated when using the receipt or bill function. If the payer prefers to receive each invoice individually, these can be emailed or printed at the time of billing or via the transactions tab.

Statements are now clearly defined as a summary of invoices. If the payer prefers to receive a summary of multiple invoices in a single document, a statement can be issued.

Invoices and statements can be issued individually or in combination, depending on the preference of your practice and the payer.

Both invoices and statements can also be emailed in bulk. The new accounting system is optimised for the paperless environment and emailing is highly recommended.

#### **More information**

If you have any questions, please contact the helpdesk team by submitting a support case here: [www.smartsoft.com.au/support](http://www.smartsoft.com.au/support)

**For urgent matters**, please call the helpdesk team on 1800 18 18 20, pressing 1 at the prompt.

To provide general feedback about your experience, please contact the Smartsoft Business Care Team by emailing: [businesscare@smartsoft.com.au](mailto:businesscare@smartsoft.com.au)