

Create Monthly Invoices

16/09/2025 9:39 am BST

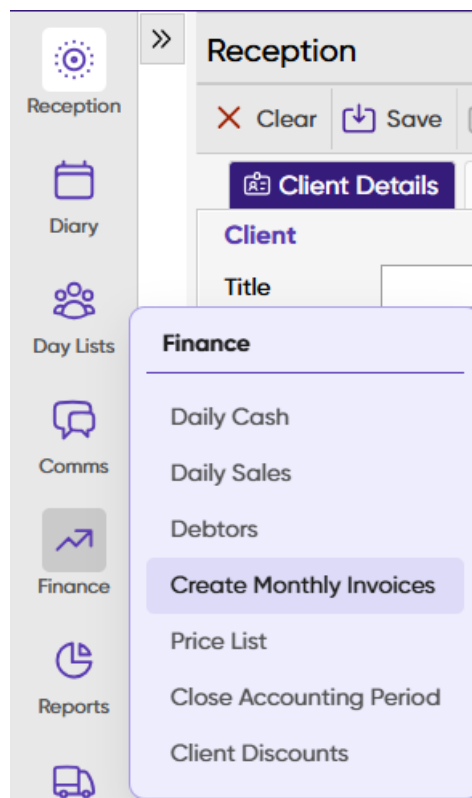
Summary

This feature offers an alternative to manually invoicing by animal. It allows you to invoice all customers who have had treatments between specified dates in bulk.

Any items that have been added to the 'Pre-Invoice' tab in the Treatments Screen for all clients are invoiced (assigning an invoice number for each client).

Details

The 'Create Monthly Invoices' screen can be accessed via the 'Finance' button from the Primary Navigation on the left-hand side and selecting 'Create Monthly Invoices'



Using Create Monthly Invoices wizard

1. Enter the dates ('From' and 'To') you are invoicing treatment for and select Next.

Create Monthly Invoices

Step 1: Date Range

Select the date range required:

From: 01/06/2025 To: 30/06/2025

Progress

- Date Range
- Client Range
- Client Categories
- Sites Part 1: Client Sites
- Sites Part 2: Work Sites
- Surgeons
- Complete

Next →

Close

2. Enter the Clients Surname range ('From' and 'To') you are running the Invoicing for (0 to zzz will select all clients). Select Next.

Create Monthly Invoices

Step 2: Client Range

Select the client range required (by Surname):

From: 0 To: zzz

Progress

- ✓ Date Range
- Client Range
- Client Categories
- Sites Part 1: Client Sites
- Sites Part 2: Work Sites
- Surgeons
- Complete

← Previous

Next →

Close

3. Select the Client Categories you wish to invoice using the arrows provided (i.e. you may only wish to invoice Large Animal clients). Select Next.

Create Monthly Invoices

Step 3: Client Categories

Select the client categories required:

Available Categories

- Small Animal
- Charity
- Companion Animal
- Exotic
- Mixed
- Prospect
- Referrals
- Special

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Selected Categories

- Equine
- Farm Animal

Progress

- ✓ Date Range
- ✓ Client Range
- Client Categories
- Sites Part 1: Client Sites
- Sites Part 2: Work Sites
- Surgeons
- Complete

← Previous

Next →

Close

4. Select the Client Sites you wish to invoice using the arrows provided (Client's Registered Site). Select Next.

Create Monthly Invoices

Step 4: Client Sites

Select the sites the client should be registered at:

Available Sites

- Referral Hospital
- Weybridge Charity Vets
- Shrewsbury
- York
- Glasgow
- Lincoln
- Bedford
- Somerset
- Norfolk

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Selected Sites

- Walton LA
- Guildford EQ

Progress

- ✓ Date Range
- ✓ Client Range
- ✓ Client Categories
- Sites Part 1: Client Sites
- Sites Part 2: Work Sites
- Surgeons
- Complete

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Close

5. Select the Work Sites you wish to invoice (Work Site refers to the site the treatment was recorded at). Select Next.

Create Monthly Invoices

Step 5: Work Sites

Select the sites the work should have been entered at:

Available Sites

- Esher SA
- Referral Hospital
- Weybridge Charity Vets
- Shrewsbury
- York
- Glasgow
- Lincoln
- Bedford
- Somerset

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Selected Sites

- Walton LA
- Guildford EQ

Progress

- ✓ Date Range
- ✓ Client Range
- ✓ Client Categories
- ✓ Sites Part 1: Client Sites
- Sites Part 2: Work Sites
- Surgeons
- Complete

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Close

6. Select the Surgeons work you wish to invoice using the arrows provided. Select Next.

Create Monthly Invoices

Step 6: Surgeons

Select the surgeons the work should have been done by:

Available Surgeons

Selected Surgeons

Jamie Smith
Heather Duffy (HeatherD)
Sharon Holland
Ali Matorian (AM)
Edward Charles
A J Jones
Ellie Lightowler (EL)
James Jukes (JJ)

Progress

✓ Date Range
✓ Client Range
✓ Client Categories
✓ Sites Part 1: Client Sites
✓ Sites Part 2: Work Sites
Surgeons
Complete

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Next →

Close

7. The final step is to complete the 'Create Monthly Invoice' using the three available buttons:

Create Monthly Invoices

Step 7: Complete

Check your parameters...

Date Range: 01/06/2025 to 30/06/2025
Client Range: '0' to 'zzz'
Client Categories: Equine, Farm Animal
Client Sites: Walton LA, Guildford EQ
Work Sites: Walton LA, Guildford EQ
Surgeons: All Surgeons
☒ Include Credit Notes for Printing Invoices

And Select the action you'd like to take:

Print Pre-Invoice Items Invoice Pre-Invoice items Print Invoices

Progress

✓ Date Range
✓ Client Range
✓ Client Categories
✓ Sites Part 1: Client Sites
✓ Sites Part 2: Work Sites
✓ Surgeons
Complete

← Previous

Close

Print Pre-Invoice Items

Generates a PDF document, which you can print or save to your computer, of all items that are currently in the Pre-Invoice tab which meet the requirements of your filters. These are the items that are set to be invoiced.

Invoice Pre-Invoice Items

This button executes the invoicing of the Pre-Invoice items. Once selected, all of the Pre-Invoice items specified on the 'Print Pre-Invoice Items' list will be invoiced and moved from the Pre-Invoice tab to the Treatment History tab for each Client and Animal.

Note: Once this button has been selected, you cannot undo this action.

Print Invoices

Once the above process has been completed, invoices can be generated using the 'Print Invoices' button. Selecting this button will generate a PDF for you to check before printing.

Email Invoices

Invoices can be emailed via Finance > [Debtors](#).
