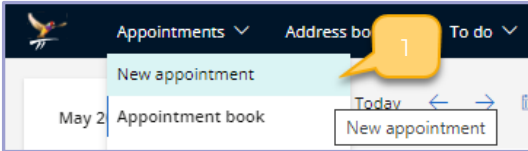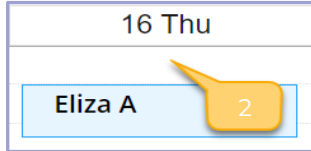# Management Workflows

Pt 1

Appointments

Create a New appointment via one of the following options:
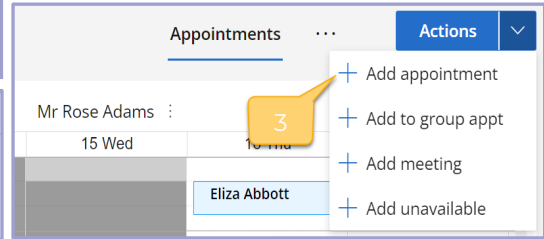
1. Select **Appointments** > **New appointment** from the main menu bar.
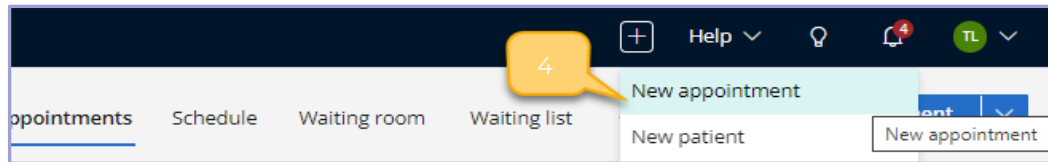
2. Double click a timeslot in the Appointment book.

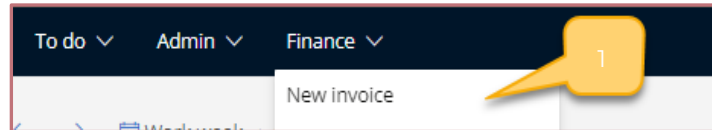**3**. Click the actions button in the top-right corner of the appointment book and select + **Add appointment**.

4. Click the + plus icon in the top-right corner of the menu and select **New appointment**.
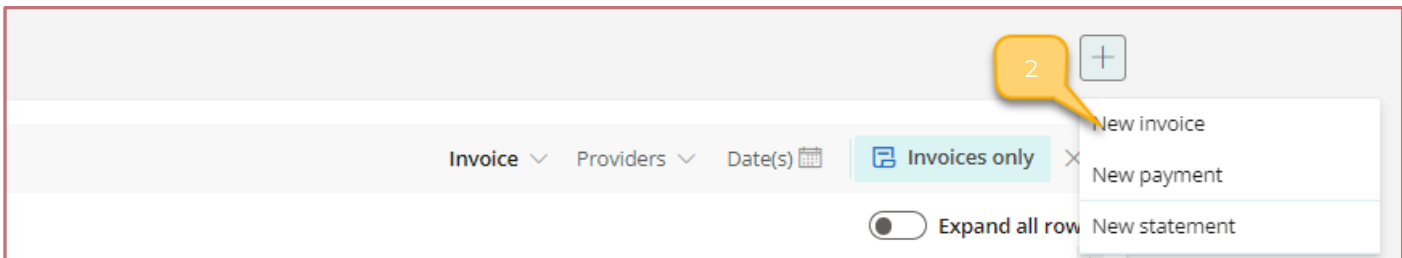
Invoicing

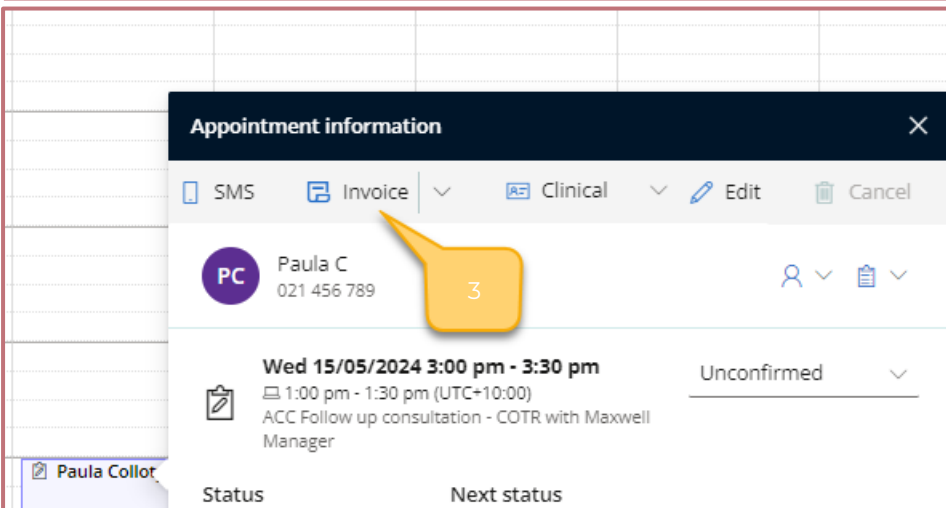Create a new invoice via one of the following options:

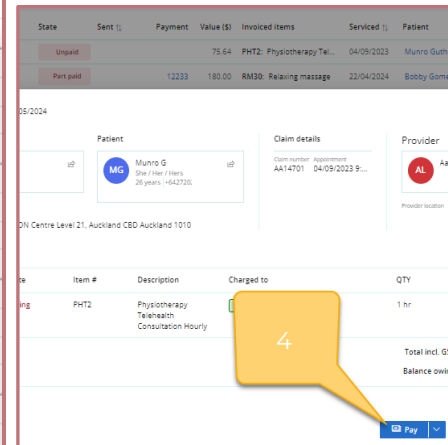**1**. Select **Finance** > **New Invoice** from the menu bar.

2. Select **Finance** > **General Accounts** from the menu bar, click the + plus icon in the top-right corner of the General Accounts screen and select New invoice.

3. From the appointment book, select the appointment you'd like to invoice and click **Invoice** from the Appointment information card.

4. Click on the Invoice link from Finance > General Accounts, ACC Billing or Accredited billing and click **Pay**.

Appointment information

SMS   Invoice   Clinical   Edit   Cancel

PC   Paula C
021 456 789

Wed 15/05/2024 3:00 pm - 3:30 pm
1:00 pm - 1:30 pm (UTC+10:00)
ACC Follow up consultation - COTR with Maxwell Manager

Unconfirmed

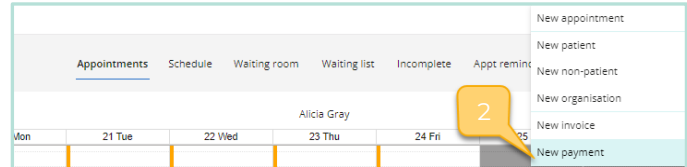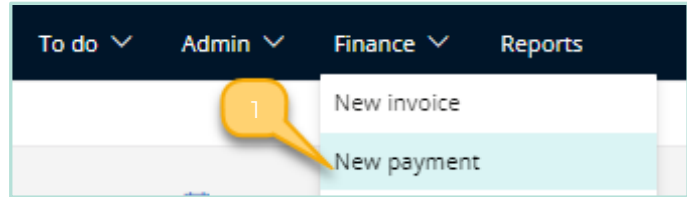Status   Next status

Management Workflows

Pt 2

Payments

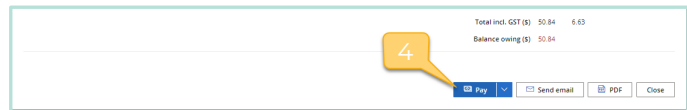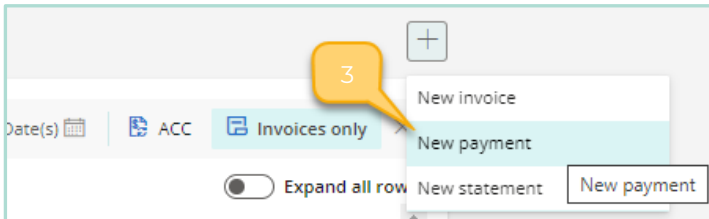Create a new payment via one of the following options:

1. Select Finance > New payment from the main menu bar.

2. Select Finance > General accounts and click the + plus icon in the top right then select New Payment.

3. Click the + plus icon in the top right corner of the menu bar and select New Payment.

4. Click on the Invoice link from Finance > General accounts, ACC Billing or Accredited billing and click **Pay**.

New Patients

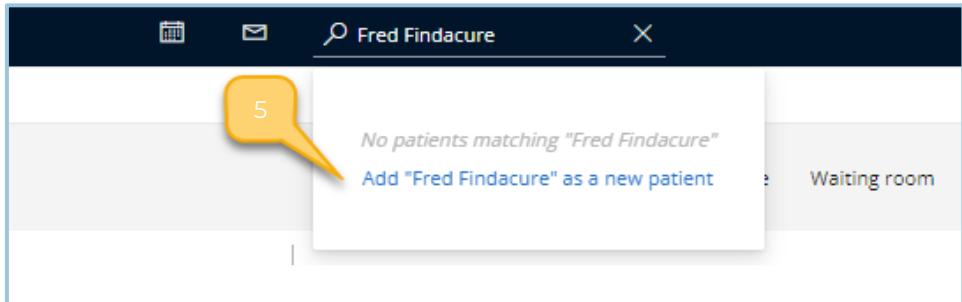New patients can be created via one of the following options.
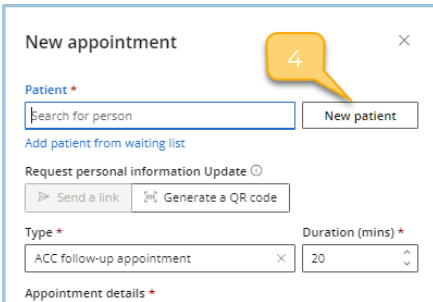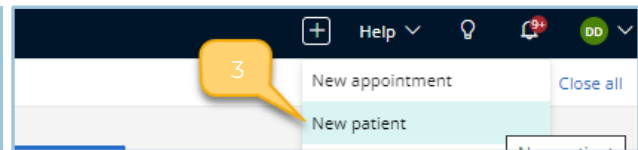
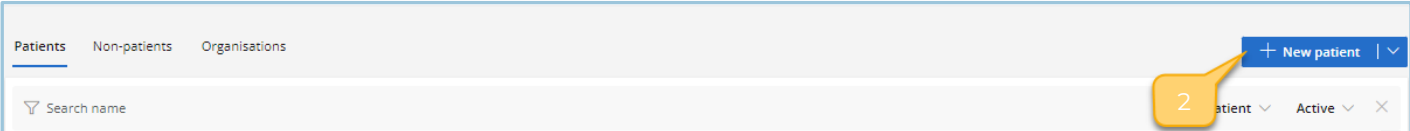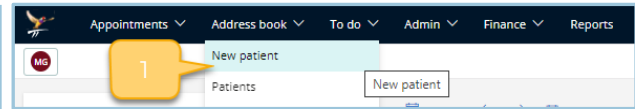**1**. Address book > New patient from the menu bar

2. Select Address book > Patients and click + New Patient in the top right corner of the Address book.

3. Click the + plus icon in the top right corner of the menu bar and select New patient.

4. From the New appointment card, select New patient

5. Click 'Search patients' from the menu bar, type in the patient's name then select ' Add as a new patient'.

6. From Finance > New invoice, select 'new patient'.