

Estimates

23/10/2024 3:20 pm BST

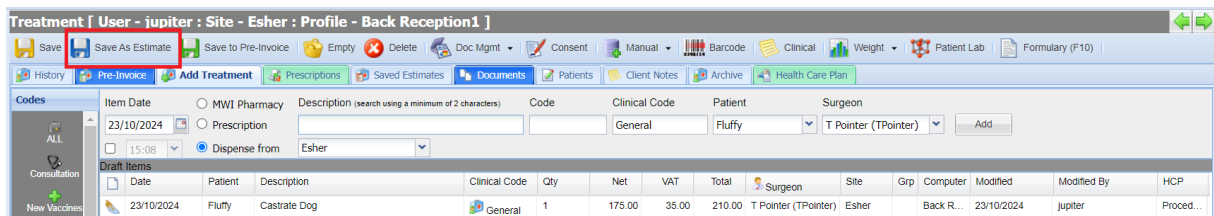
Summary

The Estimates tab within the Treatment Screen is used to view, print and process created estimates. Estimates are created in the 'Add Treatment' screen.

Details

Create an Estimate

1. Navigate to the **Add Treatment** Screen (Treatment > Add Treatment Tab).
2. Add all the treatments to the **treatment draft** (as described in [Adding a Treatment](#)).
3. Once all the treatments have been added, select the '**Save as Estimate**' button.



4. A window will appear asking for further details regarding the estimate.

Save As Estimate

Description

Expiry Date

Limits

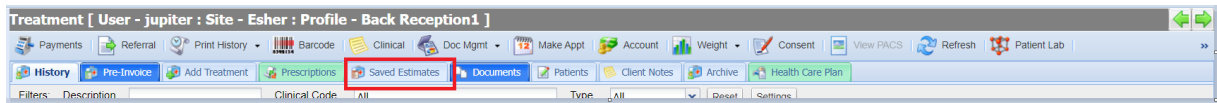
☐ Upper ☒ Lower

OK Cancel

5. **Description** =
Description for estimate
6. **Expiry Date** = Period the estimate is valid until.
Upper/Lower Limits = Indicates if the estimate will cost up to or at least the amount stated.
7. Select '**OK**' to save the estimate. The estimated is added to the 'Saved Estimates' tab.

Viewing Estimates

1. Select the **Saved Estimates** tab within the Treatment Screen.



2. All estimates are visible in the upper half of the screen. Select the estimate you wish to view.

The screenshot shows the 'Treatment [User - jupiter : Site - Esher : Profile - Back Reception1]' window. The 'Saved Estimates' tab is highlighted with a red box in the top navigation bar. Other tabs include History, Pre-Invoice, Add Treatment, Prescriptions, Documents, Patients, Client Notes, Archive, and Health Care Plan. The main area displays a table of estimates.

Estimate No	Site	Date	Expires	Type	Estimate Description	Net	VAT	Total	Patient	Client	Created By
600186	Esher	23/10/2024	23/10/2024	Lower	Castration	175.00	35.00	210.00	Fluffy	Emperor A Jupiter	jupiter

3. The contents of the estimate are displayed in the lower half of the screen.

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Date	Description	Clinical C...	Surgeon	Qty	Net	VAT	Total	Grp
23/10/2024	Castrate Dog	General	T Pointer (TPointer)	1	175.00	35.00	210.00	

Print an Estimate

1. **Select the estimate** in the upper half of the screen.

The screenshot shows the 'Treatment [User - jupiter : Site - Esher : Profile - Back Reception1]' window. The 'Saved Estimates' tab is highlighted with a red box in the top navigation bar. Other tabs include History, Pre-Invoice, Add Treatment, Prescriptions, Documents, Patients, Client Notes, Archive, and Health Care Plan. The main area displays a table of estimates.

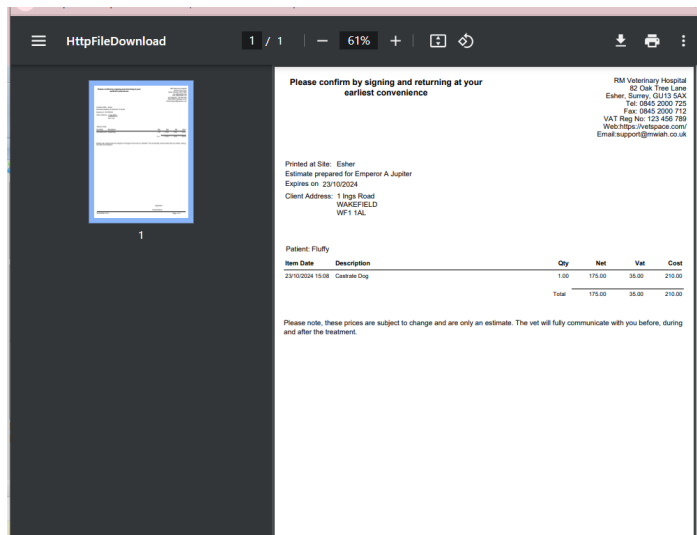
Estimate No	Site	Date	Expires	Type	Estimate Description	Net	VAT	Total	Patient	Client	Created By
600186	Esher	23/10/2024	23/10/2024	Lower	Castration	175.00	35.00	210.00	Fluffy	Emperor A Jupiter	jupiter

2. Select the **'Print Estimate'** button.

The screenshot shows the 'Treatment [User - jupiter : Site - Esher : Profile - Back Reception1]' window. The 'Print Estimate' button is highlighted with a red box in the top navigation bar. Other tabs include History, Pre-Invoice, Add Treatment, Prescriptions, Saved Estimates, Documents, Patients, Client Notes, Archive, and Health Care Plan. The main area displays a table of estimates.

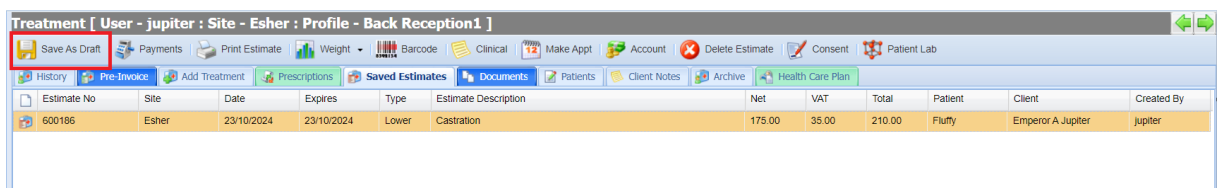
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3. A PDF document is generated.



Processing an Estimate back to draft

1. **Select the estimate** in the upper half of the screen.
2. Select the **'Save as Draft'** button



3. The items will be added to the **Add Treatment** draft.
4. This work can be added to/edited/deleted as required using double click (permission based)
5. Select **'Save'** to save the work to the Patient's Treatment History.