

## Step 1: Set up the recurring lens plan charge

Open the CL Mgt form for the patient.



Underneath the top grey box click on the button 'Add New Aftercare Fee'

Direct Debit / Contact Lens Summary - Mrs Patricia Maylin

Item Type	Eye	Qty	Description	Order Date	Supply Date	Expiry Date	Rx Date	To Be Ordered	Auto Sale	DD	Price	Int	Int	One Off	Type	Auto Ship

Monthly Spend paid for by DD/SO: £0.00  
 Total Monthly Spend: £12.00

On the 'Product/Service To Be Supplied' window select the monthly professional fee you would like to charge the patient.

Products / Services To Be Supplied

Contact Lens Information

Prescription:

Eye:

Aftercare Information

No of Checkups Per Year:

No of Eye Exams Per Year:

All Products/Services

Product:

Description	VAT	Quantity	Price
Eyeplan_Fee - Eyeplan Fee (1 month)	Exempt	1	£10.00

To be supplied every:  (Select)

Supply Type:

To be Ordered
  Sold Automatically
  Paid for by DD or SO
  Automated Shipment

Next Supply Date: 
 Expiry Date: 
 Date Cancelled:

Notes:

All Products/Services

Product: Eyeplan\_Fee - Eyeplan Fee (1 month) (£10.00)

Description: Eyeplan\_Fee - Eyeplan Fee (1 month)

VAT: Exempt

Quantity: 1

Price: £10.00

To be supplied every: (Select)

Supply Type: Collect from branch

To be Ordered  Sold Automatically  Paid for by DD or SO  Automated Shipment

Next Supply Date: 07 September 2020

Expiry Date: 07 September 2020

Date Cancelled: 07 September 2020

Notes:

This will then display a description of the product in the description field.

Type in the 'To be supplied every' field the number 1

And then select 'months from the drop down'

To be supplied every: 1 Months

Select the supply options, 'Sold Automatically' and 'Paid for by DD or SO'

To be Ordered  Sold Automatically  Paid for by DD or SO  Automated Shipment

Select from the date picker the first supply date you would like the system to charge the DD account for the monthly professional fee.

Next Supply Date: 01 October 2020

Click 'Save'

Products / Services To Be Supplied

Contact Lens Information

Prescription: [ ]

Eye: [ ]

Aftercare Information

No of Checkups Per Year: 0

No of Eye Exams Per Year: 0

Update Aftercare

Save

Exit - Don't Save Changes

All Products/Services

Product: Eyeplan\_Fee - Eyeplan Fee (1 month) (£10.00)

Description: Eyeplan\_Fee - Eyeplan Fee (1 month)

VAT: Exempt

Quantity: 1

Price: £10.00

To be supplied every: 1 Months

Supply Type: Collect from branch

To be Ordered  Sold Automatically  Paid for by DD or SO  Automated Shipment

Next Supply Date: 01 October 2020

Expiry Date: 07 September 2020

Date Cancelled: 07 September 2020

Notes:

A note of this recurring monthly charge will be added to the top grey box.

Item Type	Eye	Qty	Description	Order Date	Supply Date	Expiry Date	Rx Date	To Be Ordered	Auto Sale	DD	Price	Int	Int	One Off	Type	Auto Ship
A		1	Eyeplan_Fee - Eyeplan Fee ...		01/Oct/2020			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	£10.00	1	M	<input type="checkbox"/>	B	<input type="checkbox"/>

## Step 2: Setting up the DD/SO Mandate

Click on the 'Set up Mandate' button

Set Up Mandate

Mandate Maintenance

Collection Method:

First Collection Date: 21 Sep 2020  Date Cancelled:  Date Created/Modified: 7 Sep 2020

Next Collection Date: 5 Oct 2020  Collect Every:  Months  7 Sep 2020

Mandate Reference: RE 5237  Sort Code: 000000  Account Number:  Account Name:

Notes:

Start Date	Type	Amount	No of Payments	Notes	End Date
7 Sep 2020 <input type="text"/>	Prod Supp <input type="text"/>	£10.00 <input type="text"/>	<input type="text"/>	<input type="text"/>	7 Sep 2020 <input type="text"/>

Total Monthly Value of Goods Supplied: £10.00  Total for Next Payment: £0.00

Select the Collection method from the drop down.

Collection Method: Direct Debit

Select the first collection date for the patients DD/SO payment

First Collection Date: 1 Oct 2020

Select the next collection date after that

Next Collection Date: 1 Nov 2020

Type 1 into the 'Every' field

Collect Every: 1  Months

Type in the patient account details

Mandate Reference: RE 5237  Sort Code: 000000  Account Number:  Account Name:

By default the payment field will be filled with the amount of the monthly charge set up in set 1.

Copy Details From Another Patient

Start Date	Type	Amount	No of Payments	Notes	End Date
7 Sep 2020	Prod Supp	£10.00			7 Sep 2020

Quit - Don't Save Changes

Create Mandate

Save Online

Total Monthly Value of Goods Supplied: £10.00

Total for Next Payment: £0.00

Add This Payment

Click the 'Add this payment' button.

Copy Details From Another Patient

Start Date	Type	Amount	No of Payments	Notes	End Date
7 Sep 2020	Prod Supp	£10.00			7 Sep 2020

Quit - Don't Save Changes

Create Mandate

Save Online

Total Monthly Value of Goods Supplied: £10.00

Total for Next Payment: £0.00

Add This Payment

The payment will be added to the grid

Start Date	Type	Amount	No of Payments	Notes	End Date
07/Sep/2020	Prod Supp	£10.00	0		

Click 'Create Mandate'

Copy Details From Another Patient

Start Date	Type	Amount	No of Payments	Notes	End Date
07/Sep/2020	Prod Supp	£10.00	0		

Quit - Don't Save Changes

Create Mandate

Save Online

Total Monthly Value of Goods Supplied: £10.00

Total for Next Payment: £0.00

Add This Payment

The main CL Mgt form will show a summary of the charge and payment now set up

Monthly Spend paid for by DD/SO:	£10.00
Total Monthly Spend:	£10.00
Total for Next Payment:	<b>£10.00</b>

Now every month the patient will be charged for the monthly lens plan fee. This will be automatically entered into the 'Goods/Services paid for by DD/SO' column.

Goods/Services paid for by DD/SO	
Payment Date	Amount

Every month the patients DD/SO payment will be entered into the 'SO/DD payments Received' column.

SO/DD Payments Received		
Date Collected	Amount	Type