Step 1: Set up the recurring lens plan charge

Open the Cl Mgt form for the patient.

CL Mgmt

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

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

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'

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

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

Click 'Save'

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			☐	☑	☑	£10.00	1	M	☐	B	☐

Step 2: Setting up the DD/SO Mandate

Click on the 'Set up Mandate' button

Select the Collection method from the drop down.

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

Select the next collection date after that

Type 1 into the 'Every' field

Type in the patient account details

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

Click the 'Add this payment' button.

The payment will be added to the grid

Click 'Create Mandate'

The main CL Mgt form will show a summery 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:	**£10.00**

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