EMailing Invoices and Prescriptions

ODOfficePro has the ability to send EMails directly to patients from several areas of the system, such as appointment reminders, recalls, etc.

ODOfficePro also has the ability to attach files to the messages, by using the *Attach* button on any EMail window.

This will cause the program to prompt the user to select one or more files to be included with the EMail message.

With the ability to include attachments, and the use of the Print-to-PDF functionality, invoices and patient prescriptions can be EMailed to a Patient.

NOTE: to make use of this, a PDF driver is required.
SpinnakerWare offers use of the ODOfficePro PDF driver, which is available for download from the support page of our website. An setup guide can be found in the Document List (the link is also found on our support page).

If the ODOfficePro PDF driver is not used, then it is the responsibility of the user, to choose and setup their own generic PDF driver, which is configured in Printer Setup (File->Printer Setup). Please see the document named *Setting Up PDF Driver*.

In either case the office's EMail account information must be provided in Office Management (documentation also available to help with this).

Patient Information for Wonda Swift

File   Tools   Window   Help

| General | Insurance | Invoices | Household* | Rx | | Attach. |

					Add Prescription...
					Change Prescription...
					Copy Prescription...
					Remove Prescription

Date	Description	Acuity	Sphere	Cyl	Axis		Prism Up/Dwn	BC
04/21/06	Final Rx		+0.50	-0.50	010			
			+1.00	-0.50	005			

Make Order...
Show Orders...

EMail Prescription
Print Prescription
Show Printing History ▶

Date	Description	Trial	Lens Type	Acuity	Base	Diam.	Power	O.Z.

Print List   ☐ Include Trials   ⦿ Specs   ○ Contacts   Print Rx   Remove   Change   Add

New   Book Appt   Purchase   Pay   History   Label   Save   Cancel

---

Invoice Payment

File   Tools   Window   Help

| | | | Dr.: DP | Invoice Date: 6/30/2015 |

EMail Invoice
Print Invoice ▶
Show Printing History...

Void Invoice
Reverse Invoice
Write-off Invoice

Cancel Invoice
Mark Invoice as Paid

Change Doctor...
Change Customer...

Refresh Invoice

View Customer...
Make Another Invoice...

Tray: [ ]   Ready Date: [ ] 🗓

Chg Del   Amount: [ ] Set
           Authorization: [ ]

			Date	Cost
	Order #30695		6/30/2015	$158.00

...mer Amount: $158.00   Set

...ments [ ]

Balance: $158.00   Discount

Payment: [158.00] [▼]   Make Payment   Pay Multiple

☑ Print Invoice [Itemized ▼]   Copies: [1] ⇕   Internal Note

Print   Refund   Printing Spec   Save   Cancel

Prescriptions can be EMailed, by selecting the Prescription in the list, right-clicking on it, then selecting *EMail Prescription*. This option is available from within the Patient Information window, the Rx list from the Visit Details window, and the Exam window.

Invoices can be EMailed, by opening the Invoice, and selecting *EMail Invoice* from the *Tools* menu.

In either case, the process begins with the system prompting the user for an appropriate message to send. If a custom message has not yet been provided, a default message, including the name of the office will be used. To customize this message, simply type a message and Subject, then right-click in the message area, to *Save Message*.
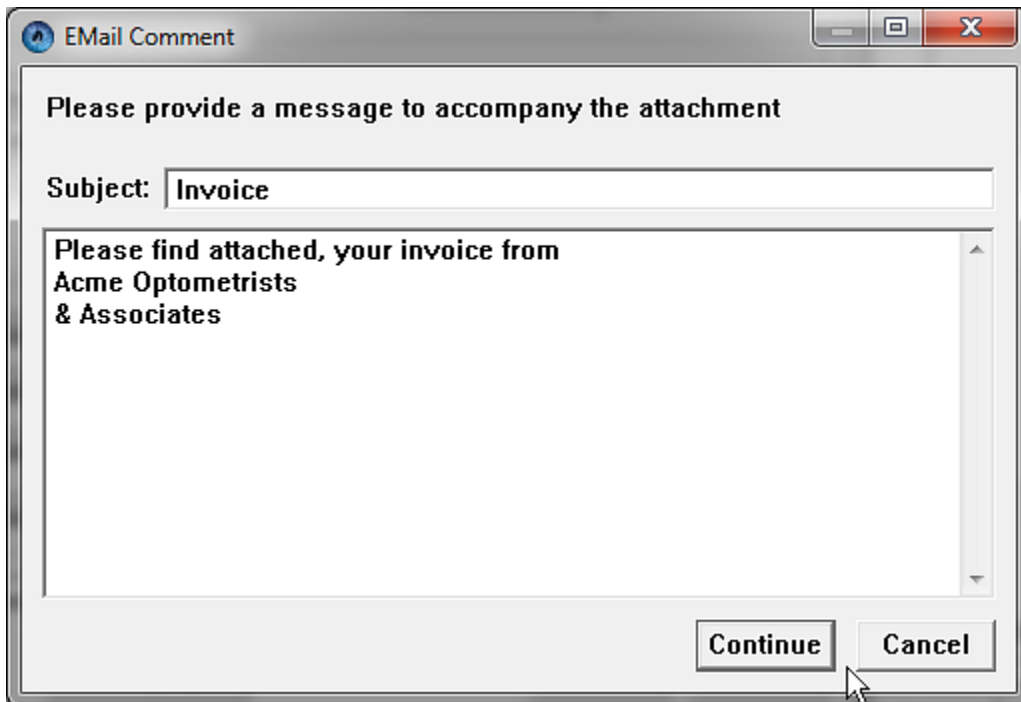
After pressing *Continue*, ODOfficePro will create a PDF file using the ODOfficePro PDF driver (if configured), or the generic PDF driver selected by the user.

If the ODOfficePro PDF driver is used, the EMail will then be sent immediately. The PDF file will be deleted, after the EMail has successfully been sent.

Using Generic PDF driver

If the user elects to use a generic PDF driver, instead of the ODOfficePro PDF driver, then there will be additional steps required.

The PDF driver will prompt the user to select a name for the file, and the location at which it should be saved.

The PDF driver will not inform the program as to when it has completed the file creation, or where the file was saved. As a result, the program will prompt the user to let it know when the PDF file creation has completed.
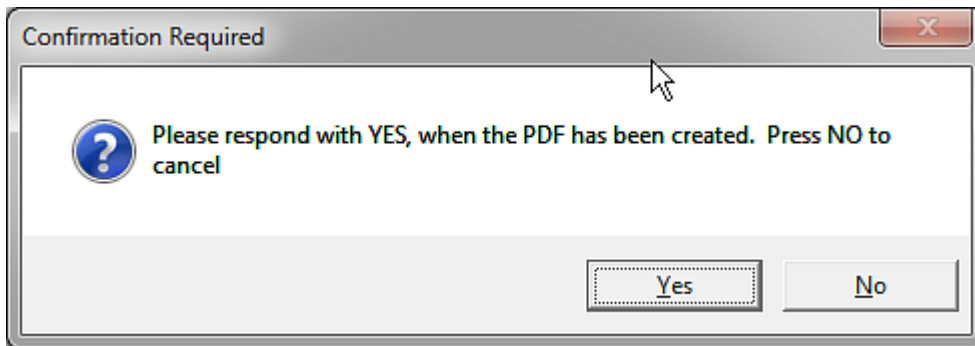
The *Yes* button should only be pressed after the PDF driver has prompted the user for a file name, and that file was created.

The program then needs to ask the user where the PDF was saved, and so another file prompter (this time initiated by ODOfficePro, instead of the PDF driver) will pop up, requesting that the user select the PDF file that was just created.
Once the file has been selected, the program will automatically send an EMail, containing the message that was entered at the first step, with the Invoice or Prescription attached.