

Invoice notes

Version: 1.00 | Last Modified on 11/03/2026 2:33 pm AEDT

Add a note to an invoice. This is useful when following up with patients on unpaid invoices or turning a quote into an invoice.

This feature is not used during invoice creation.

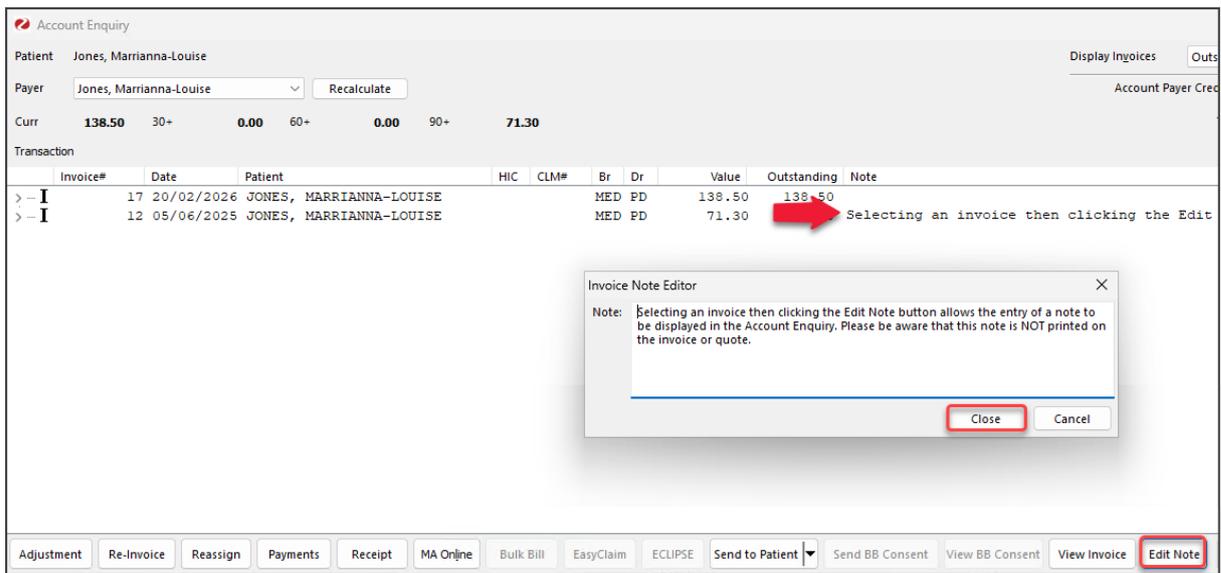
To add a note:

1. Open the patient's record and select **Acct Enquiry**.
2. Select the invoice.
3. Select the **Edit Note** button

The **Invoice Note Editor** will open.

4. Type the text
5. Select **Close** to save.

These steps can also be used to edit a note.



The screenshot displays the 'Account Enquiry' window for patient 'Jones, Marrianna-Louise'. It shows a table of transactions with columns for Invoice#, Date, Patient, HIC, CLM#, Br, Dr, Value, Outstanding, and Note. The 'Outstanding' column for the second invoice (dated 05/06/2025) is highlighted with a red arrow. An 'Invoice Note Editor' dialog box is open, containing a text area with the following text: 'Note: Selecting an invoice then clicking the Edit Note button allows the entry of a note to be displayed in the Account Enquiry. Please be aware that this note is NOT printed on the invoice or quote.' The 'Close' button in the dialog is highlighted with a red box. At the bottom of the Account Enquiry window, the 'Edit Note' button is also highlighted with a red box.

Invoice#	Date	Patient	HIC	CLM#	Br	Dr	Value	Outstanding	Note
> - I 17	20/02/2026	JONES, MARRIANNA-LOUISE			MED	PD	138.50	138.50	
> - I 12	05/06/2025	JONES, MARRIANNA-LOUISE			MED	PD	71.30		Selecting an invoice then clicking the Edit