

Batch Printing Invoices & Work Tickets

Additional Operations

How to install and use the EvoBatchPrint programs to print invoices and work tickets in batches.

Evolution includes two stand-alone batch-print programs — **EvoInvoice Batch Print** and **EvoWorkTicket Batch Print** — that let you print invoices or work tickets in bulk. This guide covers installing both programs and using each one.

Overview

The **EvoInvoice** Batch Print program lets you print invoices in a batch by selecting a date range, print order, and accounts.

The **EvoWorkTicket** Batch Print program lets you print work tickets in a batch by case-entry date range and case-entry operator, or for a case-number range.

Pre-Requisite

Both programs must be installed on your server before you can access them from client computers. Contact ABS Support to have them installed.

Installation Instructions

The same **EvoBatchPrint** folder on the server contains both programs. Complete these steps on each client PC to create the desktop shortcuts.

1. On the client PC, go to **Start > Run**. In the Run box, type **\\Evolution Server Name** (where “Evolution Server Name” is the actual PC name of your Evolution Server) and press Enter. This displays the shared directories on the Evolution Server.
2. Open the shared folder named **EvoBatchPrint**. Inside are two folders: **EvoINVOICE** and **EvoWORKTICKET** (the EvoWORKTICKET folder also handles case labels).
3. Create a desktop shortcut for each program you need:
 - o **Invoices** — open **EvoINVOICE**, right-click **EvoINVOICE.exe**, and choose **Send To > Desktop (create shortcut)**.
 - o **Work Tickets** — open **EvoWORKTICKET**, right-click **EvoWORKTICKET.exe**, and choose **Send To > Desktop (create shortcut)**.
4. If you run into any problems, contact ABS Support at (800) 476-2097.

Batch Print Invoices

Invoice, Certificate & Disclosure Printer Defaults

Invoice batch printing uses the default printers for the computer when you open the **Batch Invoice Print** program. The available printers are determined in this order:

1. The Invoice, Certificate, and Disclosure printers defined on the **Users** form (under the **Maintenance** menu) for the specific user.
2. If none are defined under **Users**, the Invoice, Certificate, and Disclosure printers defined on the **Parameters** tab of the **Company** form (under the **App Setup** menu).
3. If printers are not defined in either location in EvoData, the printers on the computer you are using.
4. If you then change the printer settings, those settings are saved until they are changed again by that user or a new version of the program is loaded.

Note: The printers must be shared and installed locally on the client computers for the Company defaults to work. Once inside the Batch Invoice Print program, you can switch to any printer available on your computer.

How to Batch Print Invoices

Open the program from the desktop icon. The **Batch Invoice Print** screen opens.

Batch Invoice Print (11.7.0.29)

[Selection Criteria]

[Selection Date to use]

☒ Invoice AR date ☐ Out of lab date

Invoice Operator: ALL OPERATORS

Start Date: 9/17/2018 End Date: 9/17/2018

[Print Order]

☒ Invoice Date ☐ Invoice Number ☐ Case Number ☐ Out of Lab Date + Case Number ☐ Carrier + Practice Name + Account Name + Case Number

[Options]

☐ Include only Invoices not already printed today

Number of Copies: 1

Invoice Report: Invoice

[Printers]

Invoice Printer: NP16A37EB (HP LaserJet 400 M401dne) Certificate Printer: NP16A37EB (HP LaserJet 400 M401dne) Disclosure Printer: NP16A37EB (HP LaserJet 400 M401dne)

☒ Dissociate formatting page size ☒ Dissociate formatting page size ☒ Dissociate formatting page size

Available Accounts

Acct#	First	MI	Last	Practice
73ADAMSSA	Sam		Adams	
1008	Sheree		Adams	
35AGERSJH	John	H	Agers	
1005			Atlanta Nu Smile	
54BALEYRC	Richard		Bailey	Bailey Dental Care
1026			Baily Dental Center	
56			BASYS Test Account	
1027	James		Campbell	
57			Card Connect Test Account	
1028	Zelda		Daniels	
1001	John	P	Doe	
1029	James		Edger	
1009	Edward		Fort	Fort Practice
46			Gentle Dental Clinic	
1030	Donald		Gentry	

Selected Accounts

Acct#	First	MI	Last	Practice
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Go

User: Barbara Knighton / Location: ABS Dental Lab

Selection Criteria — choose one date type:

- ☐ **Invoice AR Date** range and **Invoice Operator**
- ☐ **Out of Lab Date** range and **Invoice Operator**

Print Order — choose how invoices are ordered:

- ☐ **Invoice Date**

- o Invoice Number
- o Case Number
- o Out of Lab Date, then Case Number
- o Carrier, then Practice Name, then Account Name, then Case Number (cases for non-local carriers print first, then local carriers)

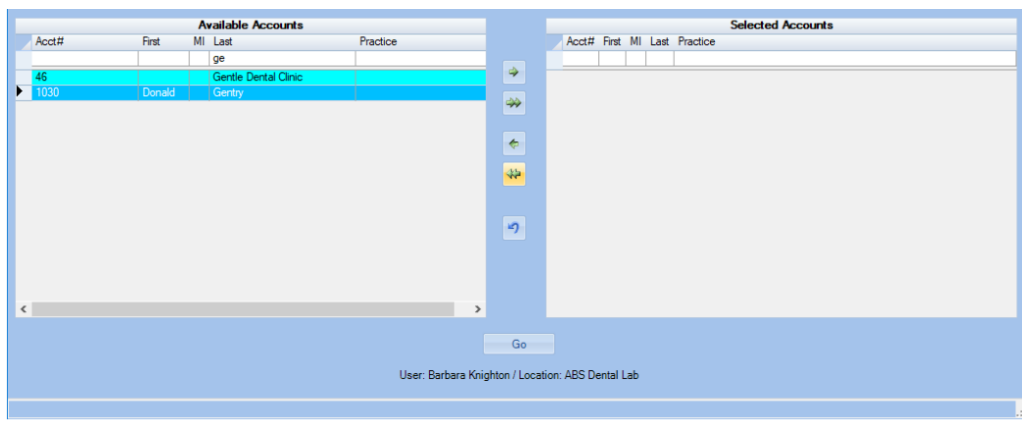
Options:

- o **Include only Invoices not already printed today** — prints only invoices not already printed via Batch Invoice Print the same day.
- o **Number of Copies** — prints the selected number of copies.
- o **Invoice Report** — selects a different invoice format from your default. If nothing is selected, be sure to select your default invoice report. Contact ABS Support for details.

Printers:

- o **Invoice Printer** — any printer available on the computer you are using.
- o **Batch Print to PDF** — useful for printing many invoices for one doctor. Pick the PDF printer; the system prompts you to name and save each PDF. Tip: create a folder for the doctor's invoices first, then save each PDF into it as prompted.
- o **Certificate Printer** — for labs set up to print certificates with eligible invoices. Any capable printer available to you.
- o **Disclosure Printer** — for labs set up to print disclosure notices with eligible invoices. Any capable printer available to you.
- o **Dissociate formatting page size** — check with ABS Support before changing these; they can cause formatting problems when you print.

Selecting Accounts — filter by typing in the header row under **Acct#**, **First**, **MI**, **Last**, or **Practice**, then use the arrow buttons between the two grids:



- o Single right arrow — move the highlighted account to **Selected Accounts**.
- o Double right arrow — move all currently displayed accounts to **Selected Accounts**.
- o Single left arrow — move the highlighted account back to **Available Accounts**.
- o Double left arrow — move all displayed accounts back to **Available Accounts**.
- o Refresh (curved) arrow — return everything previously selected to **Available Accounts**.

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When ready, select **Go** to print the invoices.

Batch Print Work Tickets

Work Ticket & Label Printer Defaults

Work Ticket batch printing does not use the Print Queue. The default printers that appear when you open the **Batch Work Ticket Print** program are determined in this order:

1. The Work Ticket and Work Ticket Label printers defined on the **Users** form (under the **Maintenance** menu) for the specific user.
2. If none are defined under **Users**, the Work Ticket and Work Ticket Label printers defined on the **Parameters** tab of the **Company** form (under the **App Setup** menu).
3. If nothing is defined in either location, the Default Printer on the computer you are using.
4. If you then change the printer settings, those settings are saved until they are changed again by that user or a new version of the program is loaded.

Note: The printers must be shared and installed locally on the client computers for the Company defaults to work. Once inside the Batch Work Ticket Print program, you can switch to any printer available on your computer.

How to Batch Print Work Tickets

Open the program from the desktop icon. The **Batch Work Ticket Print** form opens.

Print Choices — two options are available:

- o **Print by date range and Entry Operator**
- o **Print by Case Number range**

Options:

- o **Include only Work Tickets not already printed today** — prints only work tickets not already printed the same day.
- o **Number of Copies** — prints the selected number of copies.

Printers:

- o **Work Ticket Printer** — any printer available on the computer you are using.
- o **Work Ticket Label Printer** — for labs with labels set to print automatically with work tickets. Any capable printer available to you.
- o **Dissociate formatting page size** — check with ABS Support before changing these; they can cause formatting problems when you print.

When ready, select **Go** beneath your print-selection choice.

Need help?

Atlanta Based Systems Support (800) 476-2097

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