

SoftDent Software

Running Billing Statements

This two-page job aid, designed for all dental front office team members, lists the steps that will enable you to send account billing statements using SoftDent practice management software. Using the statement preview enables you to either print statements or send statements electronically.

Previewing Statements

1. To open the Statement Preview window for either electronic or paper statements, select one of the paths below.
 - **Reports > Accounting > Statements > Electronic > Electronic Batch Preview.** The Electronic Statements window is displayed.
 - **Reports > Accounting > Statements > Paper > Statement Preview.** The Paper Statements window is displayed.
2. Enter any additional information in the fields displayed. You can also use the **Statement Message** field to enter a general message to appear on all statements, such as "Happy Holidays."
3. Click **OK**. The Electronic Statement List window or the Paper Statements List window is displayed. See Figure 1.

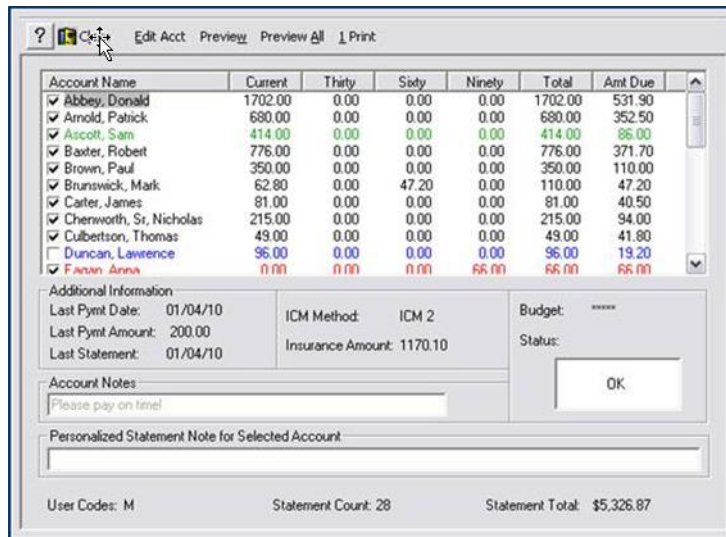


Figure 1 - Statement Preview List window

4. Deselect the **Account Name** field for those accounts that you do not want to send statements.
5. Click **Preview** if you would like to view a highlighted account's statement prior to sending or printing.

NOTE: Preview All will allow a preview of billing statements for all checked account names.
6. If previewing Paper Statements, click **Print** to print the statements on paper. If previewing Electronic Statements, click **Send** to batch statements to be sent electronically.

NOTE: An internet connection must be established prior to clicking **Send**.

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Transmitting Electronic Statements

1. If **Send** was selected on the Electronic Statements window, a message will appear asking if you would like to transmit now.
2. If you select **Yes**, the transmission process will begin.
3. If you select **No**, open the SoftDent Electronic Services window when ready. Select **Insurance > Electronic Services**.
4. Click **Statements > Transmit** to open the Transmission window to submit your statements to be processed electronically. Uncheck the **Account Name** field for those accounts that you do not want to send statements.
5. The SoftDent E-Services Software window is displayed informing you that the transmission is complete. Click **OK**.
6. The Report List window is displayed. This window displays all statement transmission reports until deleted.
7. Click **Print All** to print the Transmission Summary report for today.
8. Click **Exit** to close the **Report List** window.
9. Click **Exit** to close the SoftDent Electronic Services window and return to the SoftDent practice management software.