

Billing and payment processing

Automatically generates and processes invoices for veterinary services, handles payment collection, and updates patient records with billing status to reduce administrative burden and improve cash flow.

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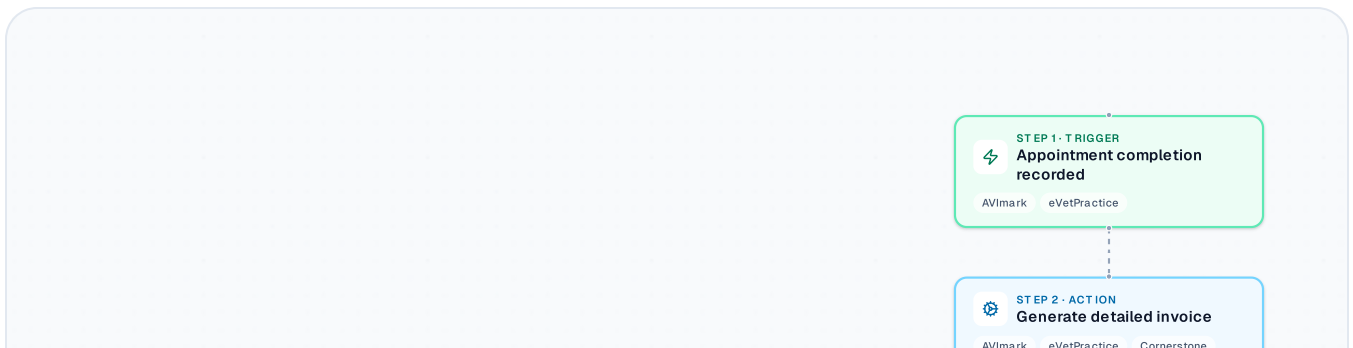


WORKFLOW TRIGGER

Veterinary appointment is marked as completed in the clinic management system

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

Appointment completion recorded

The workflow triggers when a veterinarian marks an appointment as completed in the practice management system. This automatically initiates the billing process for services rendered.

AVImark

eVetPractice

2

 ACTION

Generate detailed invoice

The system automatically compiles all services, medications, procedures, and products used during the visit into a comprehensive invoice. Line items are pulled from treatment records and inventory systems.

AVImark

eVetPractice

Cornerstone

3

 DECISION

Check payment preference

The workflow evaluates the client's preferred payment method and account status. It determines whether to process automatic payment, send an invoice, or flag for special handling.

PetDesk

AVImark

4

 ACTION

Process payment transaction

For clients with stored payment methods, the system automatically charges the card or bank account. For others, it sends a digital invoice with payment portal link.

5

ACTION

Update patient financial records

Payment status, outstanding balances, and transaction details are automatically recorded in the patient's financial history. Insurance claims are prepared if applicable.

AVImark

eVetPractice

Shepherd

6

ACTION

Send receipt and communications

Clients receive automated payment confirmations, receipts, and follow-up care instructions via their preferred communication channel. Outstanding balances trigger reminder sequences.

PetDesk

Shepherd

7

OUT PUT

Complete billing cycle

The billing process concludes with updated financial records, processed payments, and scheduled follow-up communications for outstanding balances.

AVImark

PetDesk



Outputs

- Generated invoice with itemized services
- Processed payment or sent payment request
- Updated patient financial records
- Client receipt and communication



Key Metrics

- Payment collection rate
- Average time from service to payment
- Outstanding balance reduction



Tools & Integrations

- AVImark
- eVetPractice
- Cornerstone
- PetDesk
- Shepherd
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