Dentolize · Medicolize

Financial manager

Your first week running the clinic's money

Everything a financial manager needs in **Dentolize or Medicolize**: follow up invoices and payments, record expenses, keep the treasuries right and read the monthly reports.

1. Follow up invoices
2. Edit or cancel an invoice
3. Payments, refunds and patient balance
4. Expenses and expense payments
5. Treasuries and transfers
6. Reports, income statement and salaries
7. Insurance claims and ZATCA

Log in and get the app

Log in	Open **my.dentolize.com** (dental) or **my.medicolize.com** (medical). Log in with your **email**, or click **Or login with username** and enter the **Clinic Login Name**, your username and password.
Forgot password	**Email login:** click **Forgot your password?** and use the link we email you. **Username login:** ask your clinic owner or admin to reset it in **Settings → Users**.
Mobile app	Scan to install. One app works for both Dentolize and Medicolize accounts.

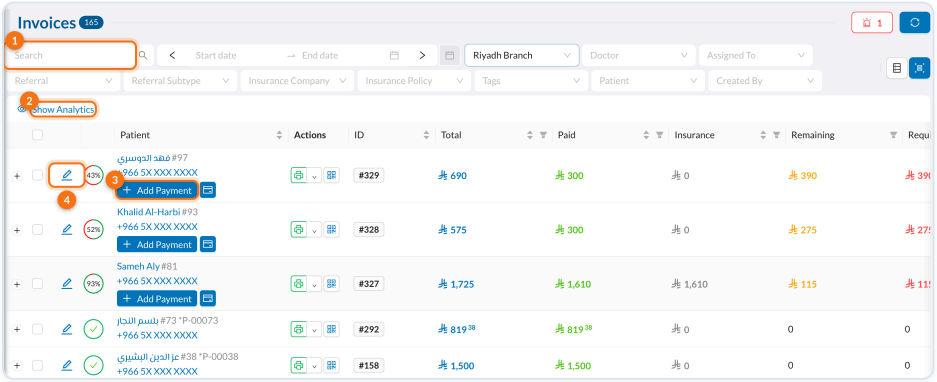
my.dentolize.com ↗ my.medicolize.com ↗

App Store Google Play

1 Follow up invoices

Go to **Finances → Invoices**. Search and filter (1) by date, branch, doctor, patient or insurance company, and click **Show Analytics** (2) for the **Total**, **Paid** and **Remaining**. **Add Payment** (3) shows on invoices not fully paid, and the pencil (4) edits one. Filter the **Remaining** column by **Greater than 0** to list unpaid invoices, then **Send Message To All** to remind those patients.

Invoices ↗ Edit an invoice ↗

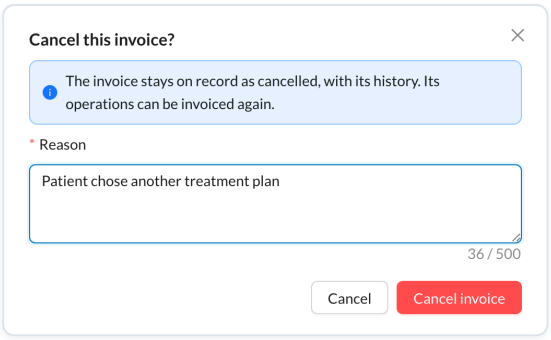


Tip: Invoices are always created from the patient's **Chart**, so there is no New Invoice button here.

2 Edit or cancel an invoice

Open the invoice and click **Edit Invoice**. With no payments yet you can change everything. Once it has payments, only its details change; use **Add Operations**, **Remove from Invoice** or **Edit Discount** on the invoice page instead.

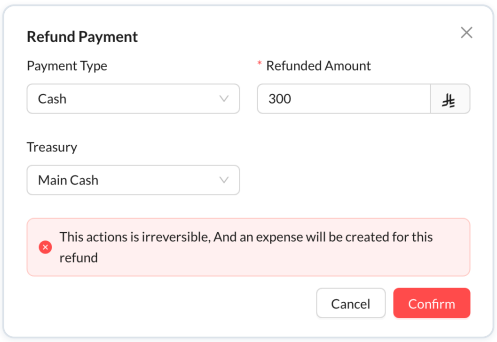
1. **Release** writes off a remaining amount you won't collect.
2. **Cancel invoice** needs a **Reason** and can't be undone.
3. Money already paid is refunded or kept as the patient's balance.



Edit an invoice ↗ Cancel an invoice ↗

3 Payments, refunds and patient balance

Finances → Payments lists every payment; **Show Analytics** gives totals by payment type. Click the edit icon on a payment to change its type, date or details (not the amount), **Delete** it, **Move to Balance**, or **Refund Payment**: choose the **Refunded Amount** and the treasury it comes out of, then **Confirm**. A refund creates an expense and can't be undone.



Payments ↗ Refund a patient ↗ Patient balance ↗

> **Tip:** Advance payments go in with **Add Balance** on the patient's page, and are used by ticking **Deduct paid amount from Patient Balance**.

4 Expenses and expense payments

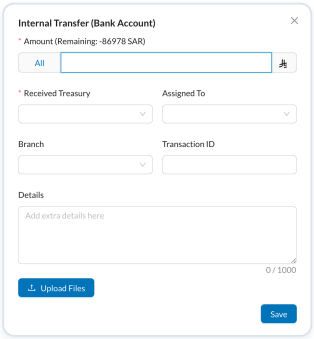
In **Finances → Expenses**, click **New Expense**.

1. Enter the **Name**, **Total** and **Type**; link a **User**, **Lab** or **Supplier** if needed.
2. Tick **Paid** to pay now: enter the **Price**, **Payment Type** and **Treasury**.
3. Click **Create**. Pay the rest later with **Add Payment**, or **Add Bulk Payment** for many.

Expenses ↗ Record an expense ↗

5 Treasuries and transfers

A treasury is a cash drawer, bank account, card terminal or safe. **Finances → Treasury** shows each one's **Balance**. To move money, click **Internal Transfer**, enter the **Amount**, choose the **Received Treasury** and click **Save**. If you pick a user in **Assigned To**, it stays pending until they click **Confirm Receiving**.

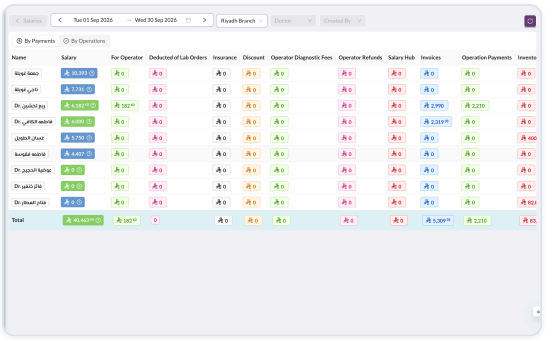


Treasury ↗ Other income ↗

6 Reports, income statement and salaries

Analytics → Reports sums up a month on one printable page, down to the final profit. **Analytics → Income Statement** shows **Revenue**, **Cost of Revenue**, **Gross Profit**, **Operating Expenses** and **Net Profit**. **Analytics → Salaries** shows what each doctor and user earned: set the dates to one full month so the base salary is included. Hover the **?** next to a **Salary** to see how it's worked out.

Monthly income & profit ↗ | Salaries ↗ | Doctor earnings ↗



7 Insurance claims and ZATCA

Insurance: each insurance share becomes an unclaimed **Insurance** payment. When the company pays, click **Mark Claimed** on it in **Associates → Insurance Companies → Payments**. **Saudi clinics:** connect ZATCA once from **Settings → Business Registration** and **Zatca Integration**. E-invoices aren't sent automatically: check **Finances → Report E-Invoices** and use **Retry Failed** for rejected ones.

Insurance claims ↗ | Connect to ZATCA ↗ | ZATCA report failed ↗

Your first-week checklist

- ☐ List unpaid invoices and remind patients
- ☐ Record a payment and a refund
- ☐ Record an expense and pay it
- ☐ Move money with an **Internal Transfer**
- ☐ Print last month's **Reports**
- ☐ Mark an insurance payment as claimed

On your phone

- Get the **Daily Summary** of invoices and payments at 11:30 PM.
- Get notifications about invoices assigned to you.
- **Clock in and out** for attendance from your phone.

Need help?

Search **docs.dentolize.com** first: most answers take under a minute. Still stuck? Message the support team in **System Chat** inside Dentolize or Medicolize, with a screenshot.

- Cancel an invoice
- Refund a patient
- Monthly income & profit
- Doctor earnings this month

docs.dentolize.com/en/faq