
CareFree Webinar – Transaction Portal

Webinar Content

Duration: 1 hour

Section 1 – Introduction

- What is the Transaction Portal used for?
- How to Log into the Transaction Portal
- Forgotten Passwords

Section 2 – Transactions

- Changing Date, Carer and Client Filters
- Manual Only, Date Warnings, Distance Warnings, No Out and No Client Filters
- Viewing Transactions Daily or Weekly
- Printing Transactions

Section 3 – Company Options

- What are Company Options?
- Popular Company Options such as:
 - Tag Touch Interval
 - Display Client KeySafe
 - Display Double-up Carer
 - Display Contacts
 - Display Call Notes
 - Display General Notes
 - Display Entry Method
 - Prompt for Driver
 - Manual Sign-in Allowed
 - Display Contact Numbers
 - Send Log
 - Play Sound with Message
- Updating Company Options for All Carers
- Updating Company Options for Individual Carers

Section 4 – Phone Numbers

- Adding Phone Numbers
- Editing Phone Numbers
- Deleting Phone Numbers
- Updating Phone Numbers for All Carers
- Updating Phone Numbers for Individual Carers

Section 5 – User Management

- Creating Users for the Transaction Portal
- Assigning and Changing User Access
- Deleting Users

Section 6 – Questions & Answers