

CareFree Webinar – Invoicing in CareFree

Webinar Content

Duration: 1 hour

Section 1 – Initial Finance Settings for CareFree

- Setting up Bank Holidays in Items
- Configuring the Bank Holiday Rate in Options

Section 2 – Contract Types Setup

- The Importance of Contract Types and how to assign them to a Contract
- How to add more Contract Types via the Items Screen

Section 3 – Charge Rules

- Changing the Rule Type to Charge
- Quick Overview of the Rules Screen
- Introduction of the 7 Rules
- How we can use the Tools Option to copy / increase rates
- Selecting the different Contract Types

Section 4 – Additions and Adjustments

- Adding Charge Adjustments for Items such as Expenses and Extra Charges

Section 5 – Verification of Calls

- Quick overview of the Verify Screen
- How to change the Call Status and Times
- Locking calls

Section 6 – The Invoices Report

- Selecting the Dates
- Setting the Invoice Frequencies
- Call Status and their Importance
- Invoicing on Actual Times if Required
- Calculate, Preview and Finalise

Section 7 – Stored Invoices

- Viewing Invoices in the Clients record

Section 8 – Correcting Mistakes on Finalised Items

- How to Unfinalise an Invoice
- How to Bulk Unfinalise Invoices

Section 9 – Questions & Answers