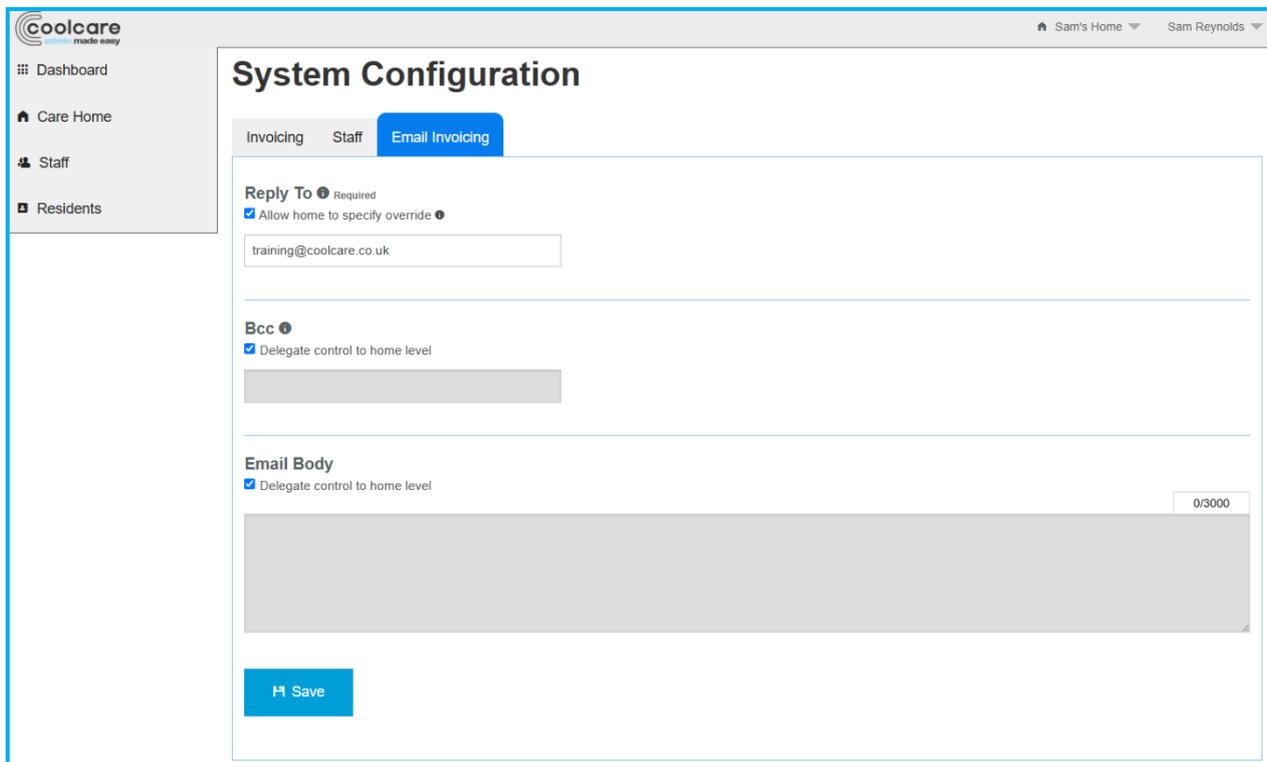# email invoicing in CoolCare.

CoolCare4 offers the ability to send invoices via email to residents and fee payers alongside printing them. This guide will explain how to set up CoolCare to be able to email invoices.

email invoicing settings.

In order to use email invoicing effectively, there are some settings that will need to be enabled first. These settings can be found in the **System Configuration** section on CoolCare, under the **Email Invoicing** tab. You can access System Configuration by clicking your username in the top right of CoolCare and choosing System Configuration from the menu. On this page, there are three options:

reply to.

This is the email address that any replies from emails sent from CoolCare will be sent to. This setting is required for email invoicing to work.

bcc.

This will send a copy of any emailed invoices sent from CoolCare to the specified email address.

email body.

This is the body of the email that is sent from CoolCare with the invoice attached. Only text can be input here, and there is a 3000-character limit.

Please note: All of these settings can be enabled to be set at home level, so each individual home can have their own reply address, Bcc address and email body if you wish each home to have their own separate settings. When enabled, these settings can be found under **Care Home – Home Setup – Settings – Email Invoicing**

enabling email invoicing on fee contracts.

Once your email invoicing settings are set up you will be able to configure which contracts invoices will be sent by email. This can be done through Billing Contract Terms for local authority/shared contracts and Fee Contracts for individual residents' private contracts.

how to enable via billing contract terms.

- Click your username in the top right of CoolCare and select **Lookups** from the menu
- Select the **Billing Contract Terms** lookup
- Choose the billing contract term you wish to send invoices as emails
- Tick the **Enable Email Invoicing** option, found on the right-hand side of the page
- Enter the email address that you wish the invoices to be sent to
- Click the **Save** button at the bottom of the page to save changes

Billing Contract Terms

> ! **Warning** - Changing this contract terms address or email invoicing information will update associated account details which belong to current residents and those who have been discharged in the last 18 months.
> Changing the Payment details will not update the fee contracts that use this billing contract.

Name Required
Leeds City Council

☑ Anonymise Invoices ⓘ
☐ Bill Discharge Date

Bill additional days on death
2

Bill additional days when cannot meet needs

Notice Period

Private Billing Contract ☐

Payable Ref
LEEDS01

Address 1

Address 2

Address 3

Address 4

Absence Fee Reductions

Fee contracts' fees using this billing contract will be reduced when resident is absent after specified number of days.

Add Reduction

Payment Details

Repeat ⓘ
Fixed Days

Number of Days
28

Payment Method
BAC

☑ Mark Invoices as Printed Automatically

Email Invoicing

☑ Enable Email Invoicing ⓘ

Invoice Email Address

> ! **Warning** - This invoicing email will be added to all NHS and LA fee contracts that use this billing contract

Once this is enabled, any fee contracts that use this billing contract term with the LA or NHS funding types will be able to have invoices generated from those contracts sent via email to the specified email address, as well as that have already been generated retrospectively.

how to enable via fee contracts.

- Navigate to **Residents – Resident Records**
- Select the resident you wish to use
- Navigate to **Billing – Fee Contracts** on the resident record
- Select the contract you wish to send invoices by email
- Tick the **Enable Email Invoicing** option, found on the right-hand side of the page
- Enter the email address that you wish the invoices to be sent to
- Click the **Save** button at the bottom of the page to save changes
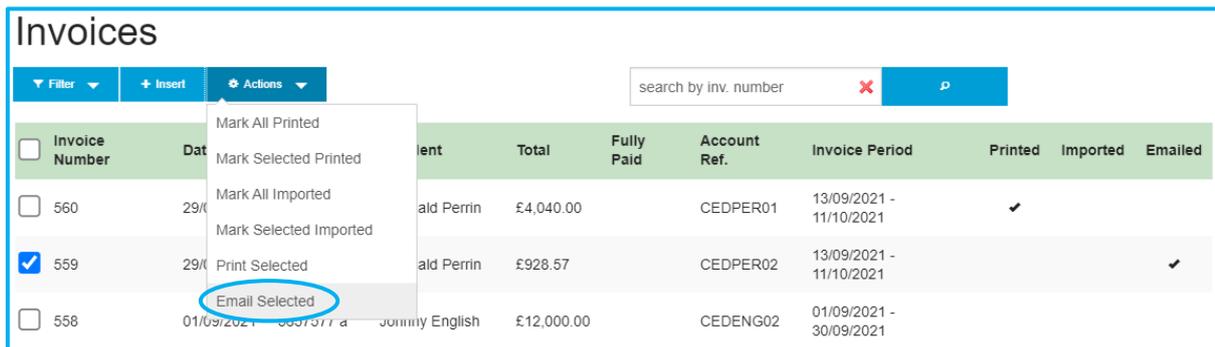

Once this is enabled, any invoices generated for this resident's contract will be able to be sent via email to the address specified, as well as that have already been generated retrospectively.

sending email invoices from CoolCare.

Once you have enabled email invoices for the contracts you require then any invoices generated for them will be able to be sent via email. You can send them from the **Invoices** section in CoolCare.

- Navigate to **Residents – Invoices**
- Click **Filter** and select **Waiting to be Emailed**, this will display any invoices that can be emailed from CoolCare and have not been emailed already
- Tick the checkbox for the invoices you wish to send
- Click **Actions** and select **Email Selected** from the list to send the invoices you previously ticked
- To send all invoices waiting to be emailed, you can choose **Email All Filtered**

This will then send the invoices from CoolCare to the email addresses specified on each contract. If you click an invoice on your invoice list you will be able to see when it was emailed from CoolCare to the recipient.
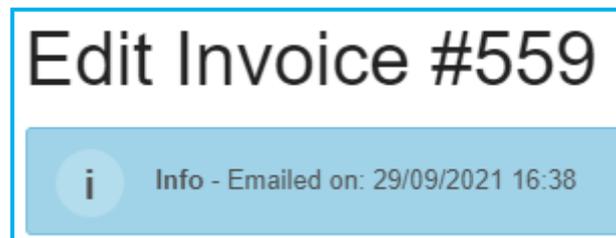
Once an email invoice has been sent it will be marked as emailed on your invoice list and will no longer appear in the **Waiting to be Emailed** filter. However, if you do need to send the invoice by email again, you will be able to by finding it on your invoice list, ticking the checkbox to select it and using **Email Selected** to send the invoice.