

CoolCare invoicing top tips

Invoicing in CoolCare uses a variety of settings and moving parts and can seem intimidating. This guide offers some tips to ensure you're getting the most from CoolCare to help with your invoicing processes; from setup to export.

billing contract terms

When setting up CoolCare for invoicing, the most important thing to get right is the Billing Contract Terms. Found in your Lookups page, the Billing Contract Terms are where you set up different contract types for your resident billing, including settings such as anonymising invoices and reducing fees if residents are absent from the home.

The best way to set these up is to have Billing Contract Terms for each local authority funder, including their address/contact details in the lookup as well as their billing cycle. This way, when setting up resident contracts you'll be able to select these contract types and have all the information and settings from the Billing Contract Terms immediately populate on the resident's fee contract.

This ensures all resident contracts for a certain local authority are consistent in their information and settings and saves you time on setup.

customising invoice output

The other important part in CoolCare's invoicing setup is customising how the invoices are output from CoolCare. This can be done in a few places:

- **System Configuration** – Here you can customise the format in which the invoices are exported and printed, as well as what information is generated and displayed on the invoices, including headers and footers. You can also upload a logo to be included on printed or emailed invoices.
Please note: when uploading a logo, ensure the file is a **.jpeg** and not **.jpg**, as only the former will work.
- **Home Setup** – If you have enabled *Home Level Footers* on the System Configuration, you can customise the footers for individual homes by going to *Home Setup – Settings*. Footers are separated by payment types.
- **Resident Fee Contract** – Individual Fee Contracts can also customise their own outputs using **Overrides**. If you need a specific fee contract to generate something different than the default specified in *System Configuration*, these overrides can be used to give the invoices for this fee contract its own description, header, and footer.

contribution changes

Once a fee contract has been created for a resident, you are able to make various changes to it; one of these being a contribution change.

As resident fees change, you can update the contract's contribution via the *Contribution Changes* tab on the fee contract. All you need is the date effective of the change and the value the contribution is changing to.

The important thing to note is that these can be backdated; if you do so it may create an adjustment on the account as CoolCare checks what the resident was charged compared to what the contribution was changed to, which will then create an additional debit or credit for the next invoice. These can be seen in the *Invoice Adjustments* section of the Contribution changes tab.

additional charges

If you need to include additional charges on a resident's invoice, there are two ways you can do this depending on the nature of the charge:

- **Billable Extras** – These can be set up for a resident to bill extra purchases and charges to a specific account on the resident's records. They can then be included on the account's invoice or can generate their own separate invoices specifically for billable extras.
- **Ad-Hoc Adjustments** – These work for one-off charges or credits, and anything that doesn't quite fit under the umbrella of billable extras. They will be generated on the account's invoice as an additional line under the main charge.

editing invoices

Once invoices have been generated through the invoicing section, they can still be amended if required. Selecting an invoice via the *Invoices* page will open it in full, allowing you to make changes. You can edit the general details such as the invoice date, billing period, payment type and footer. You can edit the individual lines of the invoice via the Invoice Items section of the page, as well as adding new lines to the invoice for additional charges/credits.

Also on this page you will find the *Controls* tab at the top, allowing you to mark the invoice as printed or imported, or alternatively, removing these flags from the invoice. Doing this is the only way you'd be able to re-export an invoice once it has been marked as imported.

Please note: you can only edit an invoice if it has not been marked as imported. As soon you mark an invoice as imported in any way it cannot be edited, even if you remove the imported flag.

creating credit notes

If you need to create credit notes for your invoices in CoolCare, there are a couple of ways this can be done. Firstly, they can be created automatically if a resident is discharged but has been billed in advance. After discharge, CoolCare's Invoicing section will display one more invoice to generate for each of the resident's fee contracts, a credit dated from the resident's final day of funding (shown on the discharge page), up to the last date they were previously billed for.

Alternatively, you can credit notes manually via the Invoices page. Using the *+Insert* button at the top of the page you can create a manual invoice for whatever resident and account you need, this then functions as a blank invoice for you to add any items to. If the invoice's Total Goods shows a negative value, it will be shown as *Credit* instead of *Invoice* when being printed/emailed from CoolCare.