



Package Providers

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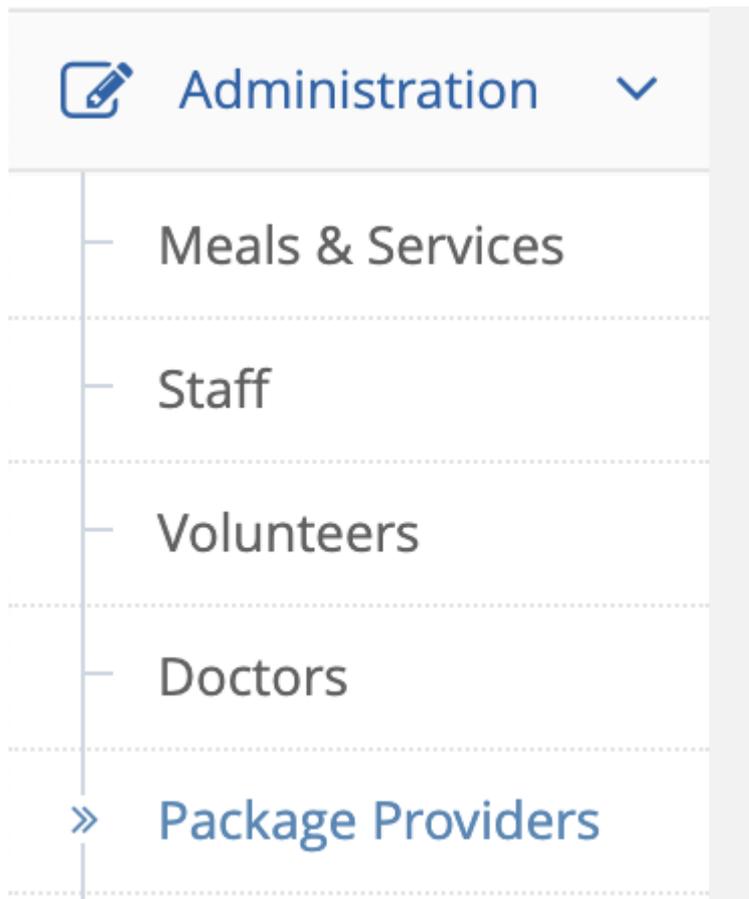
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Manage Package Providers

NOTE: If you are setting up package providers for the first time, please get in touch with us so we can help you set them up correctly.

To create a new Package Provider, click **Administration** in the main menu and select **Package Providers**.



This will take you to the **Package Provider List** page. From this page, you can view and manage existing package providers as well as create new ones.

A screenshot of the 'Package Providers List' page. At the top, there is a breadcrumb trail: 'Home > Administration > Package Providers'. Below this, the page title 'Package Providers' is followed by '» List'. To the right, there is a dropdown menu set to 'All Services', a blue 'New Provider' button, and an orange 'Export Package Providers' button. The main content is a table with the following data:

Package Provider		\$	\$	
Anglicare	0	\$0.00	\$	
NDIS	0	\$0.00	\$	
Ozcare	0	\$0.00	\$	

Create a Package Provider

To create a new provider, click the **New Provider** button. Fill in as many details as you have, and click the **Create Provider** button.

Package Provider Details

<p>* Provider Name:</p> <input type="text" value="Package Provider Name"/>	<p>Display Name: <i>This name will be used on invoices and emails</i></p> <input type="text" value="Display Name"/>	<p>* Service:</p> <input type="text" value="Please Select"/>
<p>Provider ABN:</p> <input type="text" value="Package Provider ABN"/>		

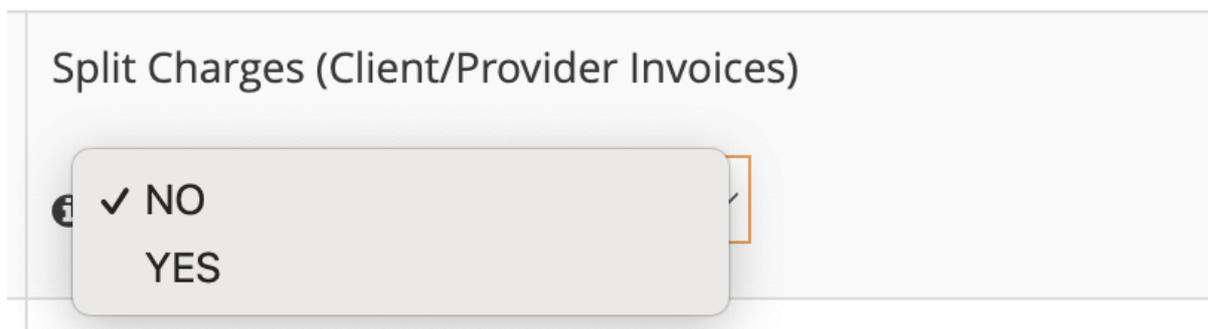
One important section to fill out is the **Invoice Information**.

Invoice Information

<p>Card ID#:</p> <input type="text" value="CARD ID"/>	<p>Does this Provider claim the DEX figure?</p> <input type="text" value="NO"/>	<p>Split Charges (Client/Provider Invoices)</p> <input type="text" value="NO"/>
<p>Admin Fee Type:</p> <input type="text" value="Please Select"/>	<p>Meal Cost:</p> <input type="text" value="0"/>	<p>Admin Fee:</p> <input type="text" value="0"/>
<p>Invoice Type:</p> <input type="text" value="Itemised"/>	<p>Invoice Terms:</p> <input type="text"/>	<p>Invoice Delivery:</p> <input type="text" value="Posted"/>
<p>Split Meal Charges & Fees On Invoice:</p> <input type="text" value="No"/>	<p>Consolidate Clients On Invoices:</p> <input type="text" value="No"/>	<p>Charge GST:</p> <input type="text" value="No"/>

Under the Invoice Information, you have to fill out the following fields:

- **Split Charges:** this will allow you to create invoices splitting costs between the client and provider.



- **Admin Fee:** an additional fee that will be added to the invoice. This is separate from meal charges.

Admin Fee:

0

- **Admin Fee Type:** this is how often the admin fee should be added to the invoice. Please note that “per meal” will be “per meal item” – all types of meals are included in this, including juices, soups, main meals, etc.

Admin Fee Type:

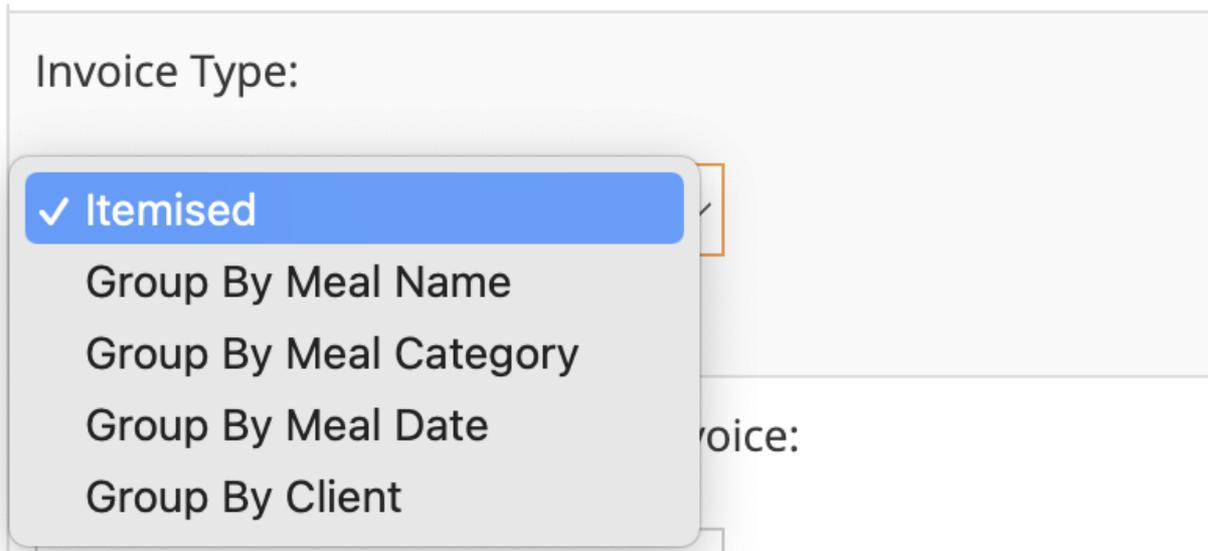
- ✓ Please Select
- Per Meal
- Per Delivery
- Per Delivery Week
- Per Client
- Per Invoice

- **Consolidate Clients:** If this is set to “yes”, one single invoice will be created for the provider that includes charges for all clients linked to the provider. If this is set to “no”, individual invoices will be created for all clients linked to the provider.

Consolidate Clients On Invoices:

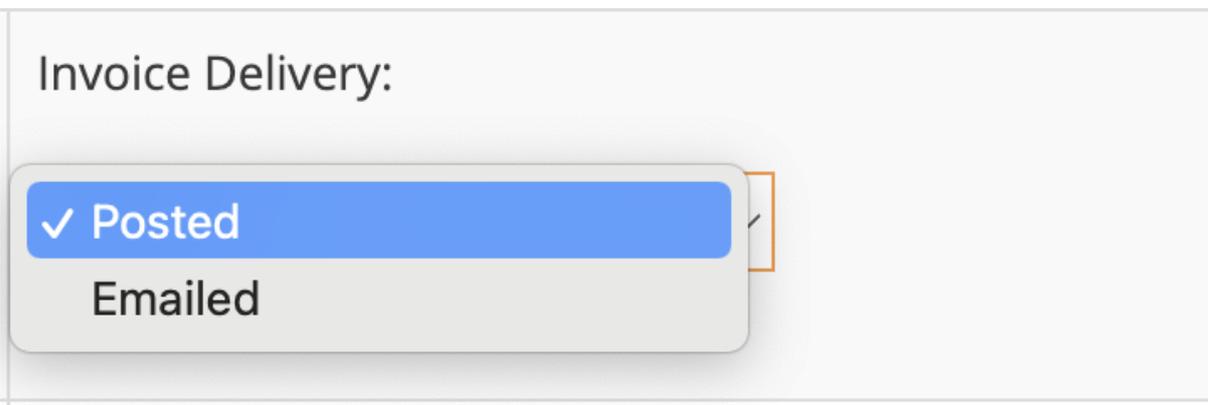
- ✓ No
- Yes

- **Invoice Type:** This is how you want the information to be grouped in each invoice.



The screenshot shows a dropdown menu for 'Invoice Type'. The menu is open, displaying five options. The first option, 'Itemised', is highlighted in blue and has a white checkmark to its left. The other options are 'Group By Meal Name', 'Group By Meal Category', 'Group By Meal Date', and 'Group By Client'. The background of the form is light gray, and the text 'Invoice Type:' is visible above the dropdown.

- **Invoice Delivery:** This is the provider's preferred delivery method for invoices



The screenshot shows a dropdown menu for 'Invoice Delivery'. The menu is open, displaying two options. The first option, 'Posted', is highlighted in blue and has a white checkmark to its left. The second option is 'Emailed'. The background of the form is light gray, and the text 'Invoice Delivery:' is visible above the dropdown.

Edit a Package Provider Information

To manage an existing provider, click the **Information** button next to the provider. You can use the tabs to navigate around the different parts of a provider's profile:

- **Package Provider Information:** The information you provided when creating a provider. This is all used for invoices.

Anglicare

Package Provider Information Contacts Files Notes

Package Provider Information

* Provider Name: Anglicare	Display Name: <i>This name will be used on invoices and emails</i> Anglicare	* Service: Office A
Provider ABN: Package Provider ABN		

- **Contacts:** This will allow you to create contacts for the people you interact with at that package provider.

Anglicare

Package Provider Information **Contacts** Files Notes

Package Provider Contacts New Contact

ⓘ	Name	Address	Role	Home	Mobile	Email	🗑️
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- **Files:** You can upload documents and link them to the provider.

Anglicare

Package Provider Information Contacts **Files** Notes

Package Provider Files New File

ⓘ	Description	Category	Filename	Date	🗑️
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- **Notes:** You can create free-text notes about the provider.

Anglicare

Package Provider Information Contacts Files **Notes**

Package Provider Notes New Note

ⓘ	Date	Category	Note	Created By	🗑️
---	------	----------	------	------------	----

Provider Account History

When viewing the **Package Provider List Page**, each provider has some additional information listed next to their name: the number of clients linked to them, and their current balance.

Package Providers » List All Services

Package Provider	Person	\$	\$	🗑️
Anglicare	1	\$0.00	\$	🗑️
NDIS	0	\$0.00	\$	🗑️
Ozcare	0	\$0.00	\$	🗑️

The current balance is a button that will take you to the package provider's **Account History** page.

Home > Administration > Package Provider > Anglicare Account History Today's Balance: \$0.00 DR

Anglicare » Account History

Date	Filter by client	Transaction	Amount	Staff
22/03/2023	test 1	Invoice #1 (PAID)	\$14.00	Admin User
22/03/2023	test 1	Credit #1 For Invoice #1	\$-14.00	Admin User

This Account History is based on the provider's invoices and payments. Each invoice lists its payment status and the credits list associated with it. From this page, you can also click on an invoice or payment to be taken to it.

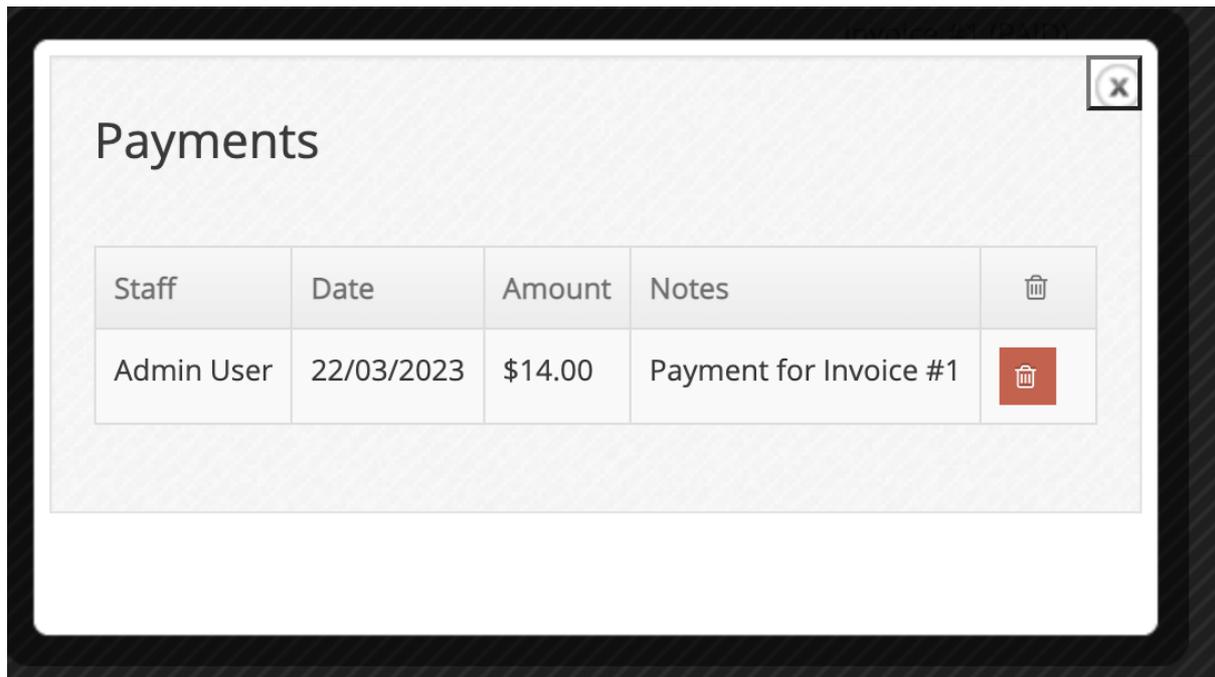
Package Provider Invoices » View Package Provider Invoice

Office A

A.B.N. 123 456 789
 PO Box 1178
 Brisbane, QLD, 4000
 Ph: 07 1234 5678

Tax Invoice

<div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc;"> Anglicare ACT </div>	<table border="1" style="width: 100%;"> <tr> <td>Invoice:</td> <td style="text-align: right;">1</td> </tr> <tr> <td>Date:</td> <td style="text-align: right;">22/03/2023</td> </tr> <tr> <td>Services Delivered Between These Dates:</td> <td style="text-align: right;">01/03/2023 - 31/03/2023</td> </tr> <tr> <td>Client:</td> <td style="text-align: right;">test 1</td> </tr> </table>	Invoice:	1	Date:	22/03/2023	Services Delivered Between These Dates:	01/03/2023 - 31/03/2023	Client:	test 1
Invoice:	1								
Date:	22/03/2023								
Services Delivered Between These Dates:	01/03/2023 - 31/03/2023								
Client:	test 1								



Add Clients to Providers

Once you have created a package provider, you can assign clients to them. To do this, navigate to a client's **Client Page** - check [Client documentation here](#).

On the **Client Page**, scroll down to the **Payments & Invoices** section. Here you can select the client's package provider. You'll also need to select the client's starting date with that provider. Once you've filled in these details, make sure to click the **Save Changes** button.

Payments & Invoices

Payment Type: Running Total		Preferred Payment Method: Unspecified
Package Provider: Please Select		Provider Invoice Reference: Invoice Reference...
		Invoice Start: dd/mm/yyyy

Provider Invoices

To invoice the providers, click **Accounts** in the main menu and select **Provider Invoices**. You'll be taken to the **Provider Invoice List** page. You can filter these invoices by **Provider**, **Invoice Delivery Type**, **Invoice Status**, **Date** and **Invoice ID**.

Click the **Show Filters** button to check these options.

Home > Accounts > Provider Invoices

Accounts » List Provider Invoices

Hide Filters | + New Invoice | Actions

Provider: All Providers | Invoice Delivery Type: All Delivery Types | Invoice Status: Show Unpaid and Partially P... | Start: 15/03/2022 | End: 15/03/2023 | Invoice ID: Invoice ID | Search

<input type="checkbox"/>	Invoice ID	Provider	Client	Emailed At	Delivery Type	Date Issued	Total	Outstanding Amount	Status	Actions
<input type="checkbox"/>	905-1093	Provider Test 1	Jaime Wayne	31/01/23	Emailed	31/01/23	\$166.32	\$166.32	UNPAID	   
<input type="checkbox"/>	905-1096	Provider Test 2	Jennifer Green	31/01/23	Emailed	31/01/23	\$68.20	\$68.20	PARTIAL PAID	   
<input type="checkbox"/>	905-1097	Provider Test 3	Bob Smith	31/01/23	Emailed	31/01/23	\$86.24	\$86.24	PAID	   

Create Invoices

To create a new invoice, click the **New Invoice** button.



When creating a new invoice, select the invoice **Date Issued** – this is pre-filled with today's date, but you can change it if you want.

Then enter an **Invoice Start** and **Invoice End** date. This is the date range you're creating an invoice for. After that, choose a **Service Outlet**.

Then, select the **Package Provider/s** you are invoicing and **Client/s** – you can leave this space blank if you wish to include all clients.

You can also opt to include **Invoice Notes**.

Click on **Create Invoice** to save it.



New Package Provider Invoice

1. Date Issued:	22/03/2023
2. Service Start:	dd/mm/yyyy
3. Service End:	dd/mm/yyyy
4. Select Service Outlet:	Please Select ▼
5. Select Package Provider:	Please select a service outlet ▼
6. Clients:	Select clients or leave blank for all
7. Invoice Notes	Optional information to be printed on invoices /

Create Invoice(s)

View Invoices

To view an invoice, navigate to the **Invoice List** page. From there, find the invoice you wish to view. Then, click the blue button containing the **Invoice ID number**.

<input checked="" type="checkbox"/>	Invoice ID	Provider	Client
<input checked="" type="checkbox"/>	905- 1093	Provider Test 1	Jaime Wayne
<input checked="" type="checkbox"/>	905- 1096	Provider Test 2	Jennifer Green
<input checked="" type="checkbox"/>	905- 1097	Provider Test 3	Bob Smith

This will display the invoice inside your web browser so you can check the details of the invoice before printing it. The provider's details can be changed on their **Package Provider Page**. Your service details can be changed on the **Service Outlet** page.

Office A

A.B.N. 123 456 789
 PO Box 1178
 Brisbane, QLD, 4000
 Ph: 07 1234 5678

Tax Invoice

Anglicare
 ACT

Invoice:	1
Date:	22/03/2023
Services Delivered Between These Dates:	01/03/2023 - 31/03/2023
Client:	test 1

Print Invoices

To print an invoice, view the invoice you wish to print. Then, click the blue **Print Invoice** button on the top right side corner. This will create a PDF file of the invoice that you can either download or email to your client.

[Package Provider Invoices](#) » [View Package Provider Invoice](#)

[Print Invoice](#)

Pay Invoices

To change an invoice payment status, click on the \$ icon in the actions column.

Amount	Status	Actions
	UNPAID	   
Update Invoice Payment Status		

That will open the payment popup. Complete the **Payment Status**, **Credit Amount**, **Credit Date** and **Payment Method**, then click **Submit Invoice Payment** to save it.



Invoice Payment

Invoice ID:	1
Package Provider:	Anglicare
Invoice Total:	\$14.00
Payment Status:	<input type="text" value="PAID"/>
Credit Amount:	<input type="text" value="14.00"/>
Credit Date:	<input type="text" value="22/03/2023"/>
Payment Method:	<input type="text" value="Unspecified"/>
Notes:	<input type="text" value="Payment for Invoice #1"/>

Submit Invoice Payment

