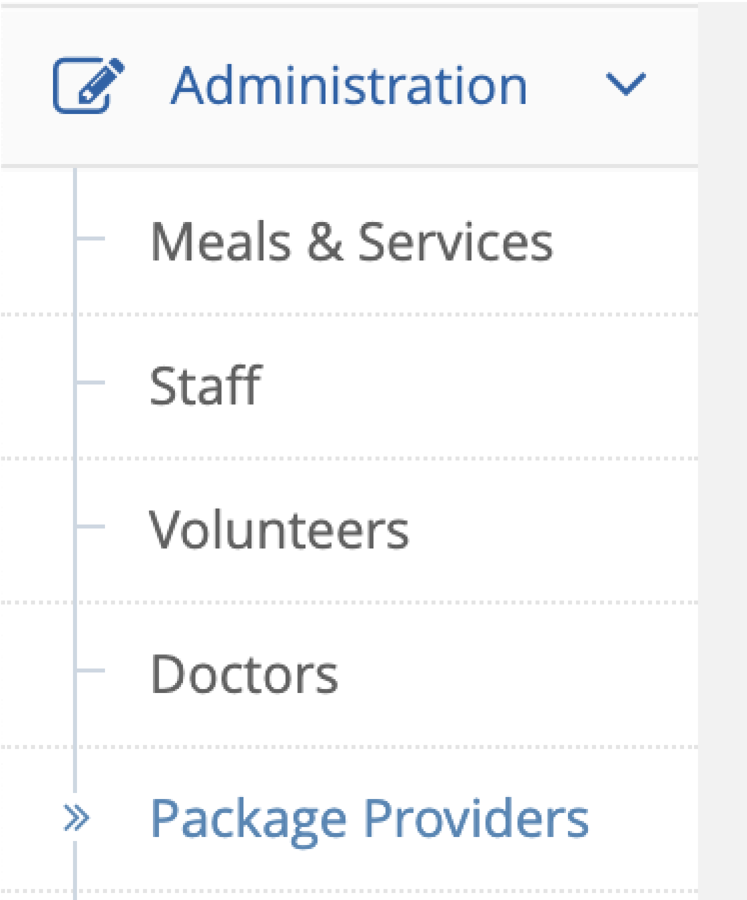
POLIXEN

Package Providers

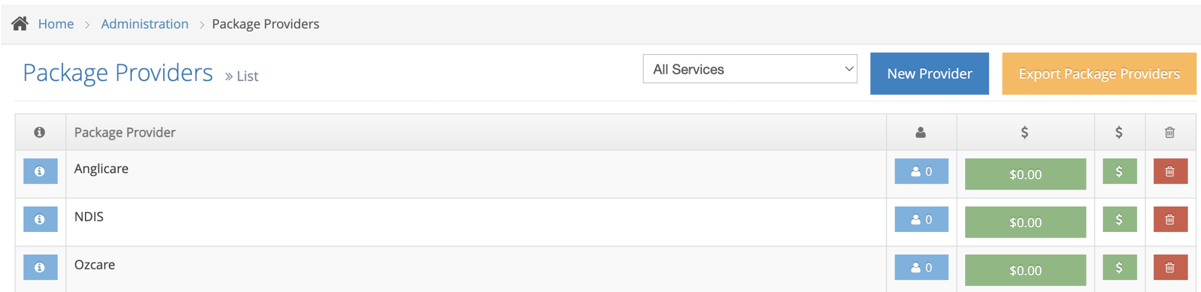
Manage Package Providers

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**.

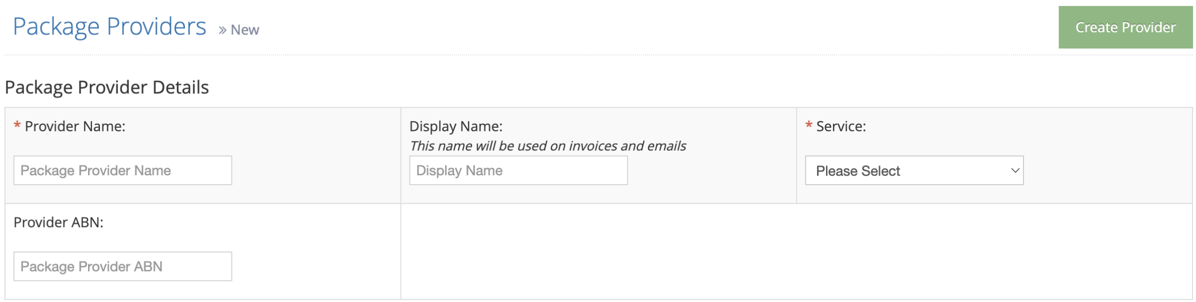


This will take you to the **Package Provider List** page. From this page, you can view and manage existing package providers as well as create new ones.

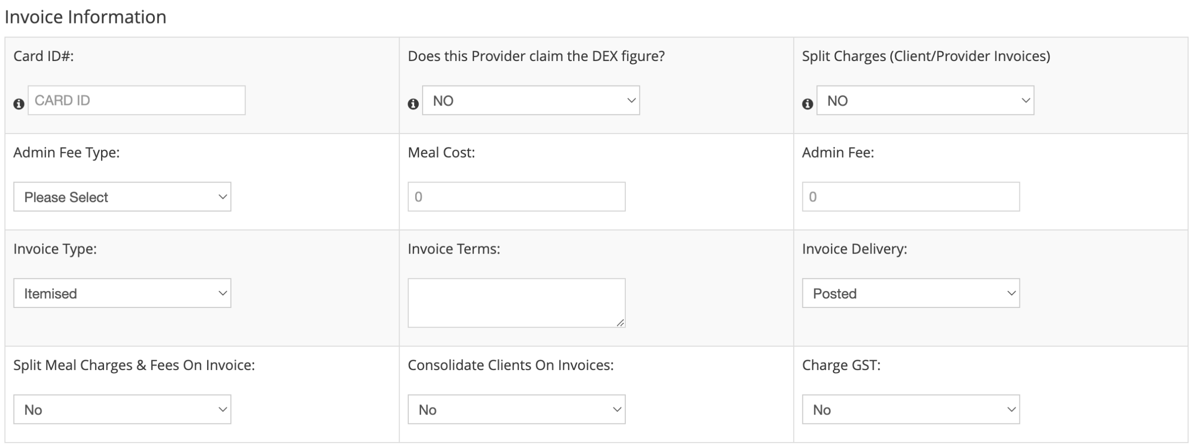


Create a Package Provider

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

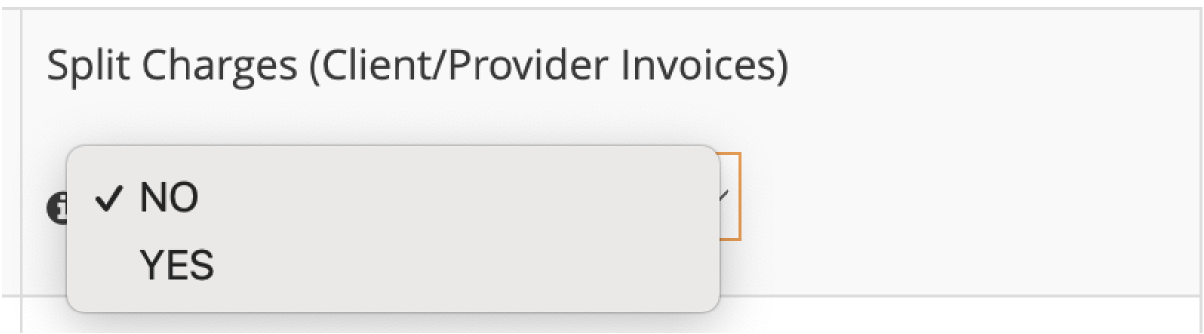


One important section to fill out is the **Invoice Information.**

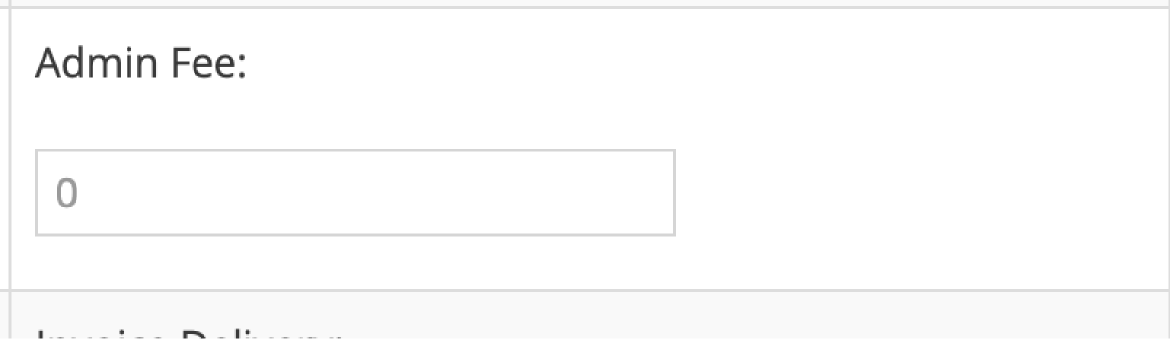


Under the Invoice Information, you have to fill out the following fields:

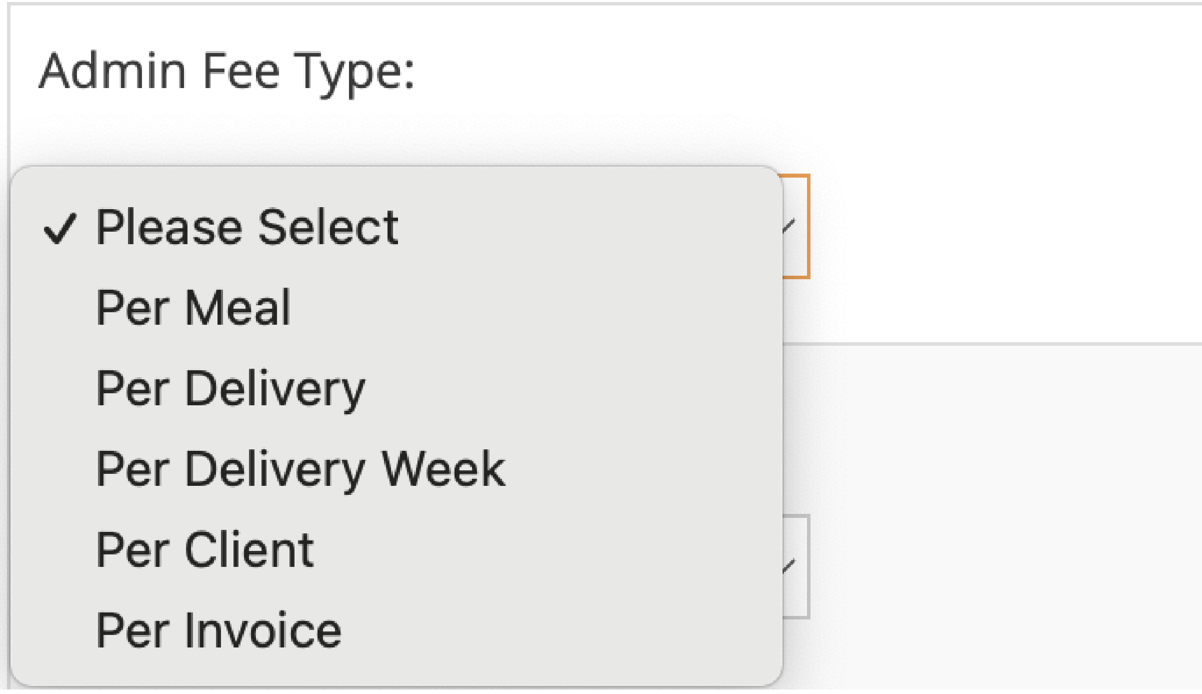
- **Split Charges:** this will allow you to create invoices splitting costs between the client and provider.



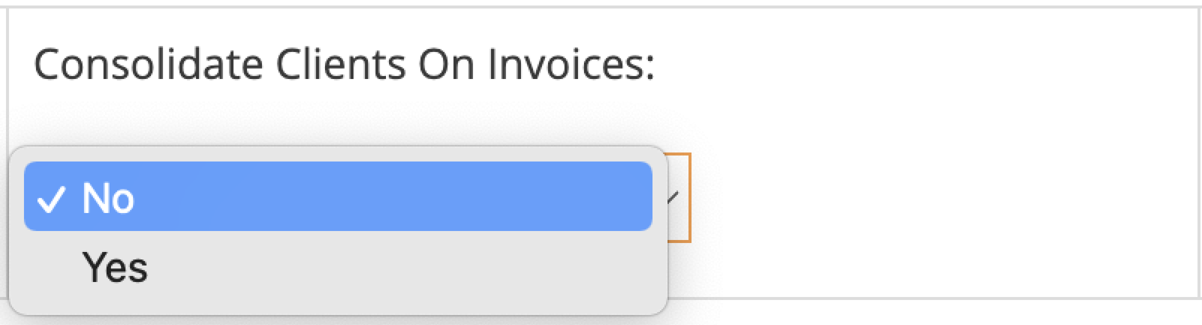
- **Admin Fee:** an additional fee that will be added to the invoice. This is separate from meal charges.



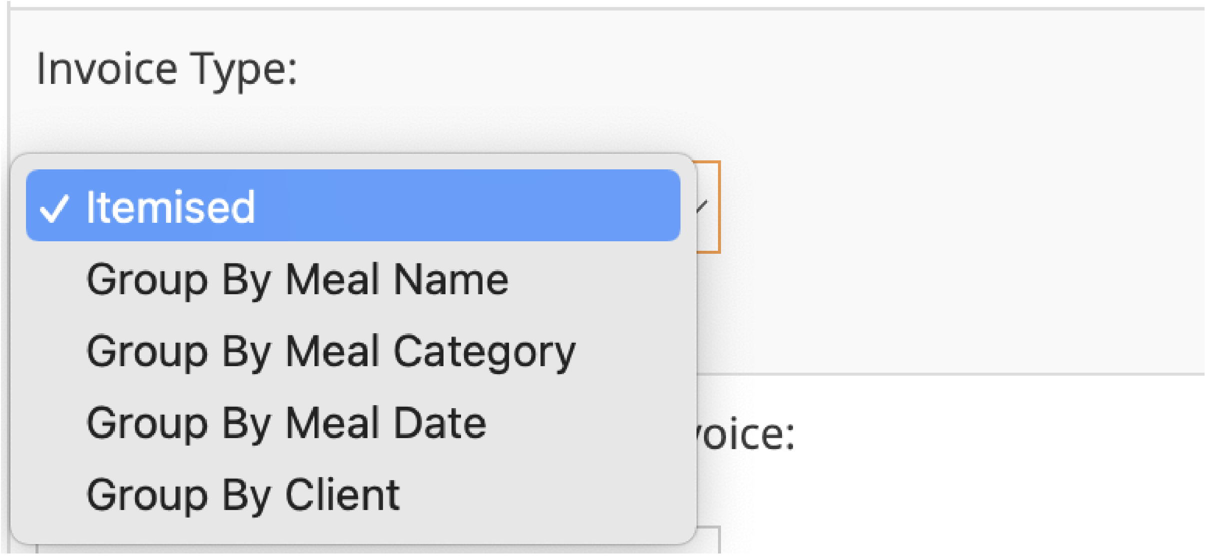
- **Admin Fee Type:** this is how often the admin fee should be added to the invoice. Please note that “per meal” will be “per meal item” – all types of meals are included in this, including juices, soups, main meals, etc.



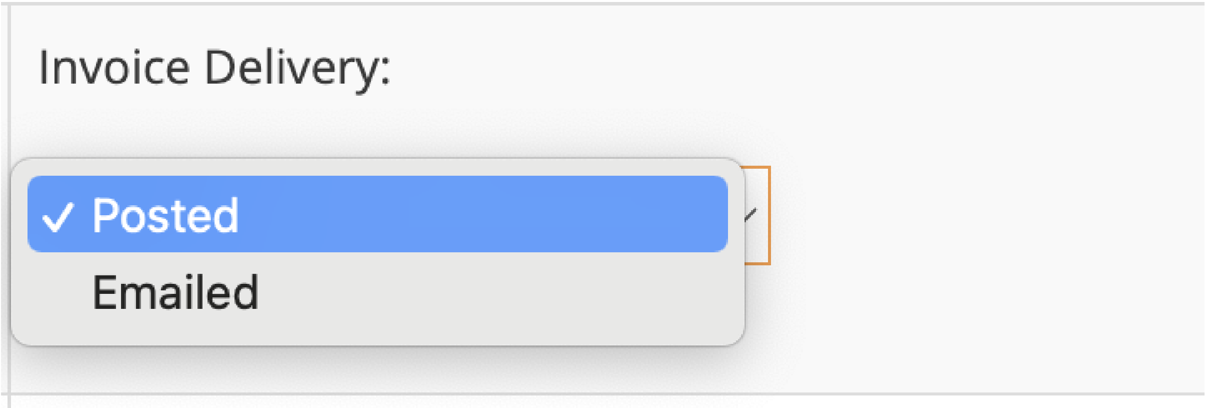
- **Consolidate Clients:** If this is set to “yes”, one single invoice will be created for the provider that includes charges for all clients linked to the provider. If this is set to “no”, individual invoices will be created for all clients linked to the provider.



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



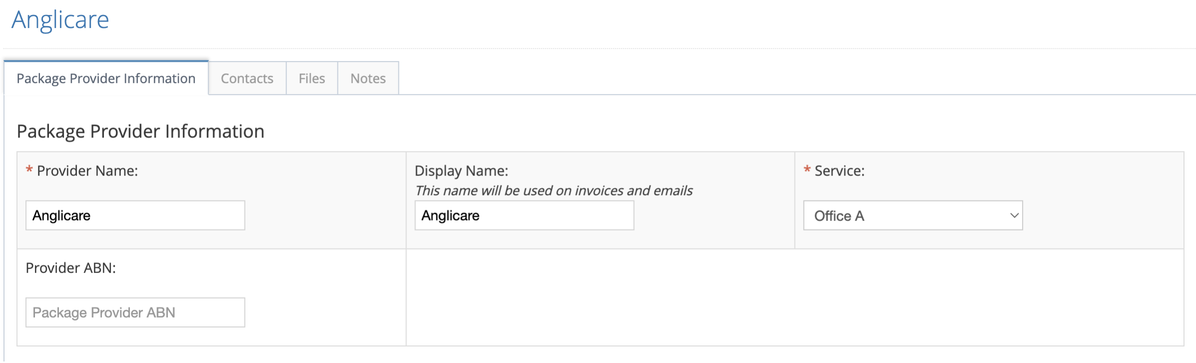
- **Invoice Delivery:** This is the provider's preferred delivery method for invoices



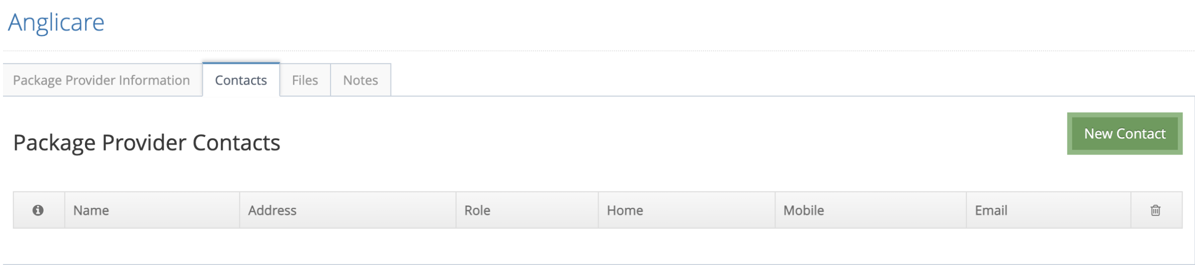
Edit a Package Provider Information

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:

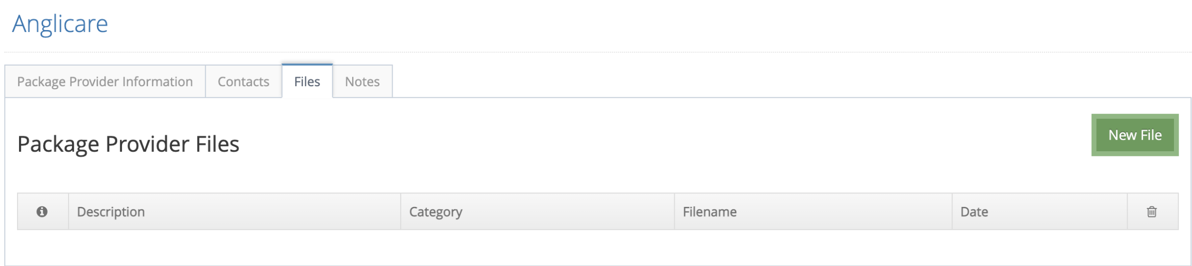
- **Package Provider Information:** The information you provided when creating a provider. This is all used for invoices.



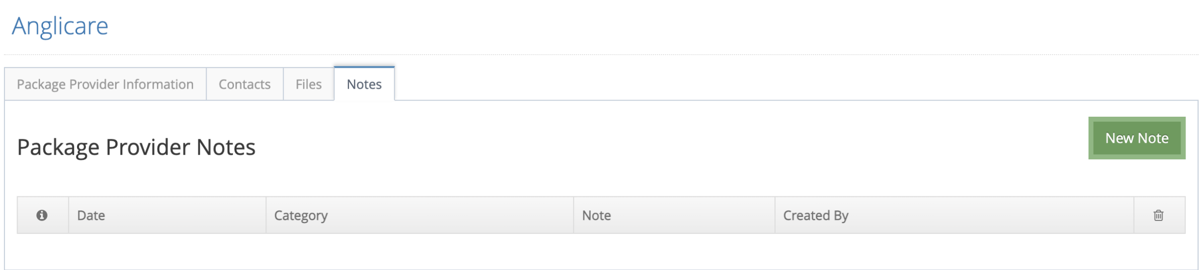
- **Contacts:** This will allow you to create contacts for the people you interact with at that package provider.



- **Files:** You can upload documents and link them to the provider.

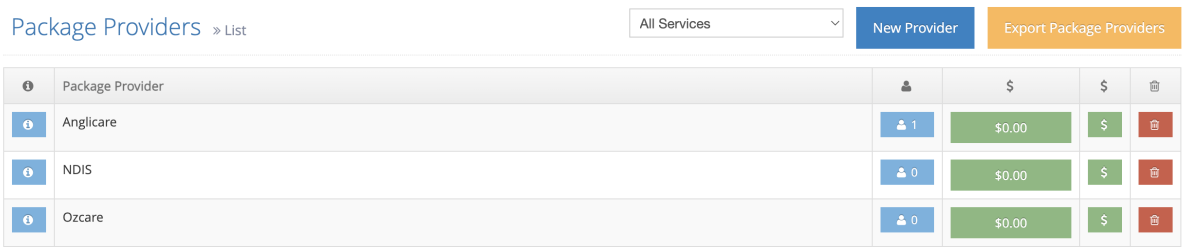


- **Notes:** You can create free-text notes about the provider.

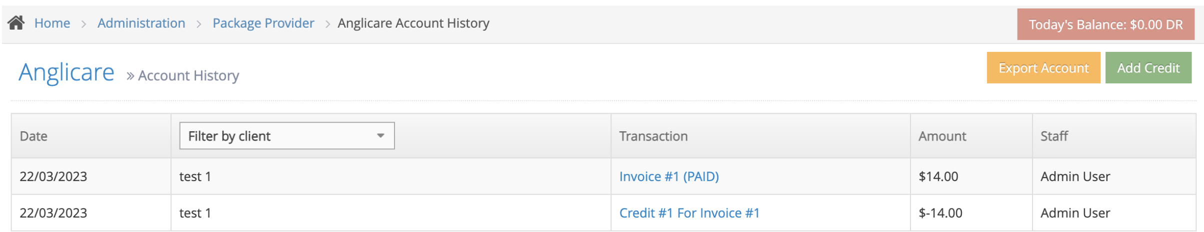


<u>Provider Account History</u>

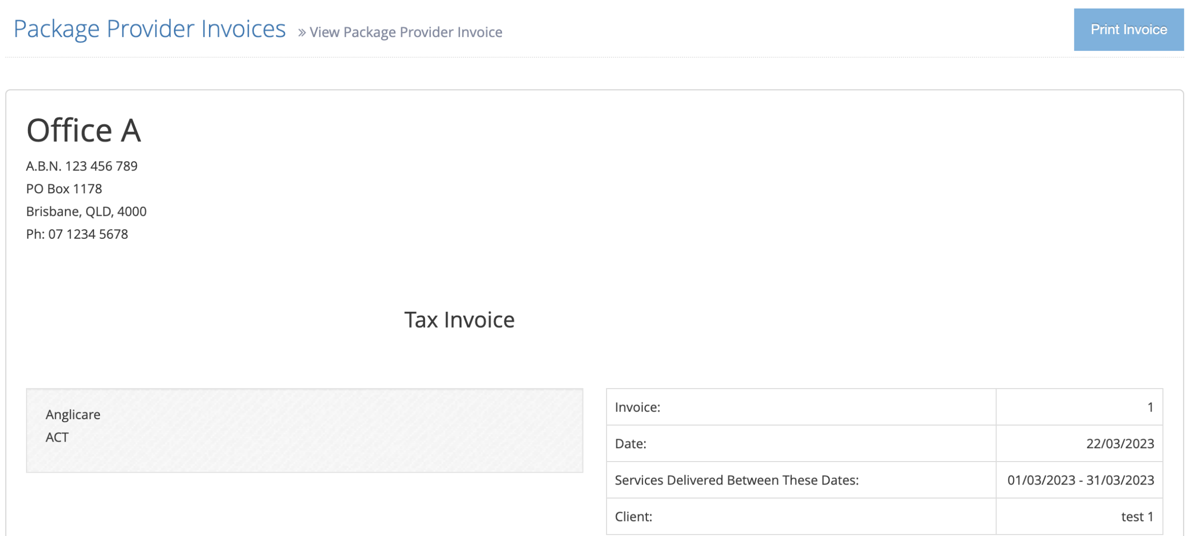
When viewing the **Package Provider List Page**, each provider has some additional information listed next to their name: the number of clients linked to them, and their current balance.

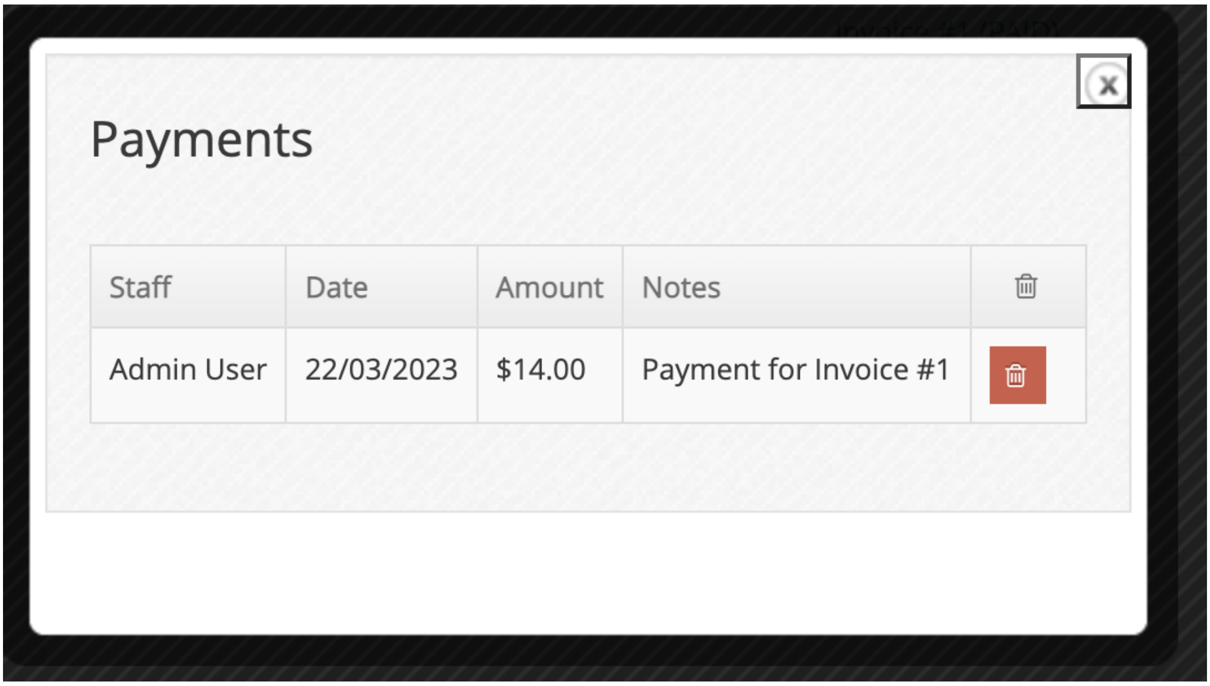


The current balance is a button that will take you to the package provider's **Account History** page.



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.





Add Clients to Providers

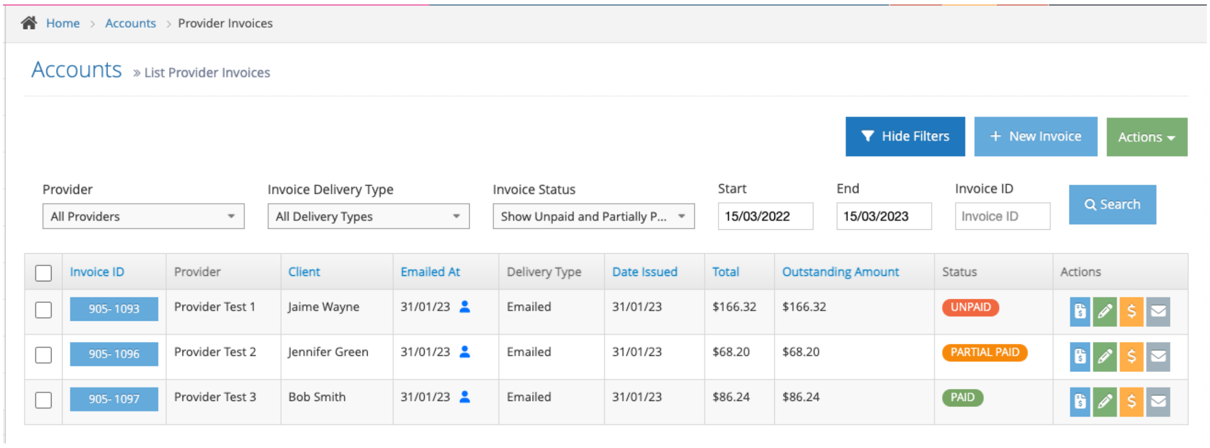
Once you have created a package provider, you can assign clients to them. To do this, navigate to a client's **Client Page -** check Client documentation here.

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.

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.



Create Invoices

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

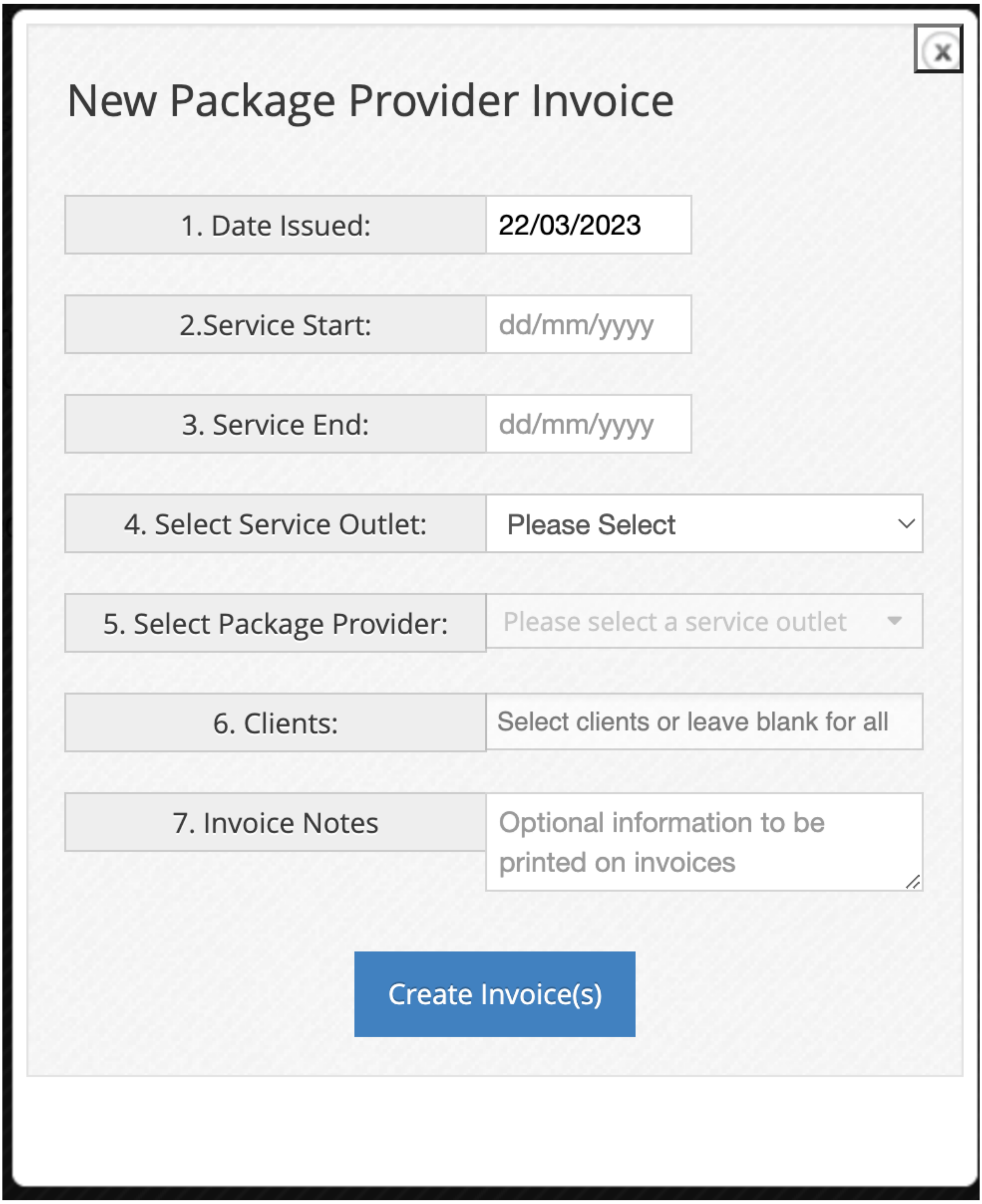
When creating a new invoice, select the invoice **Date Issued** – this is pre-filled with today's date, but you can change it if you want.

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.

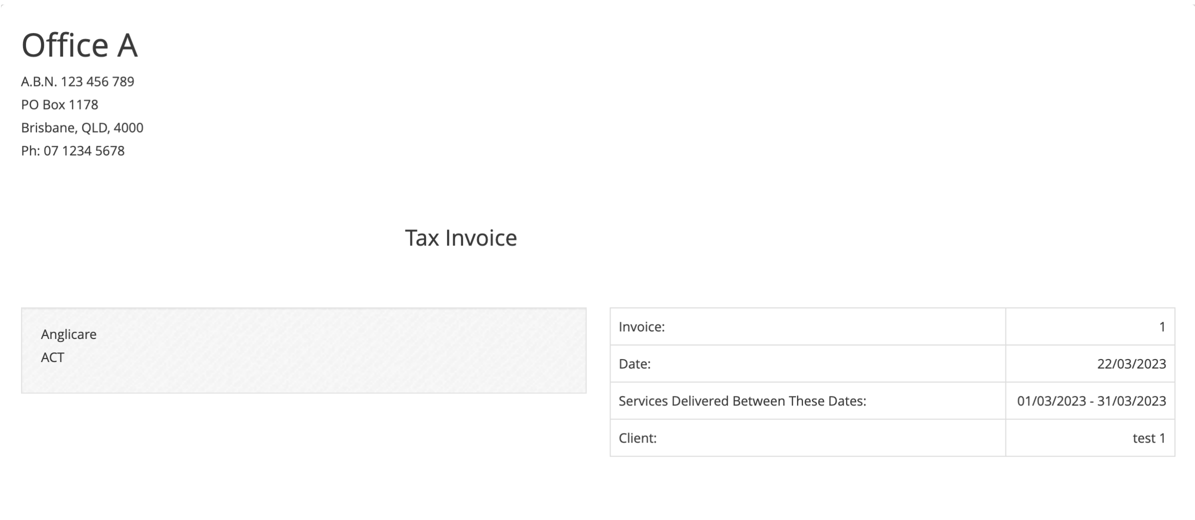


View Invoices

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**.

☑	Invoice ID	Provider	Client
☑	905- 1093	Provider Test 1	Jaime Wayne
☑	905- 1096	Provider Test 2	Jennifer Green
☑	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

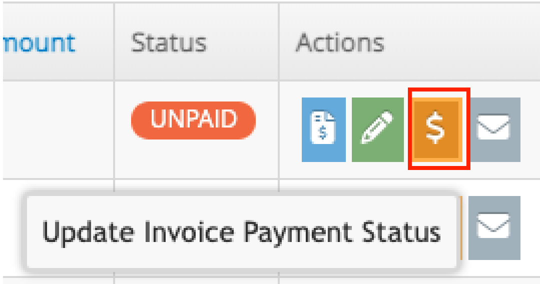
Invoice:	1
Date:	22/03/2023
Services Delivered Between These Dates:	01/03/2023 - 31/03/2023
Client:	test 1

Print Invoices

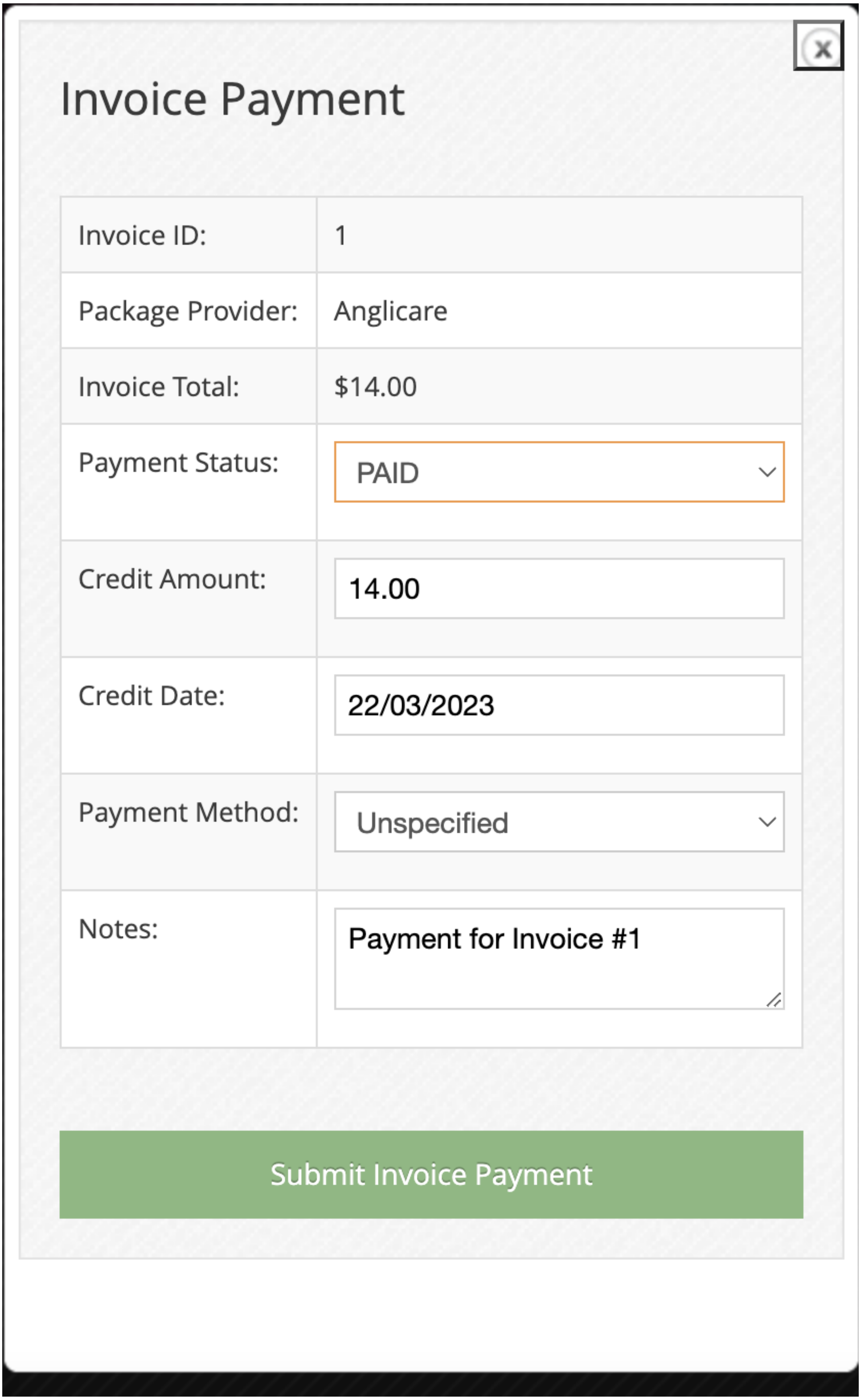
To print an invoice, view the invoice you wish to print. Then, click the blue **Print Invoice** button on the top right side corner. This will create a PDF file of the invoice that you can either download or email to your client.

Pay Invoices

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



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:	PAID
Credit Amount:	14.00
Credit Date:	22/03/2023
Payment Method:	Unspecified
Notes:	Payment for Invoice #1

Submit Invoice Payment