How to create a new contract in Consolidated Invoicing on Cloud

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Consolidated Invoicing How to create a new contract

This guide will cover how to create a new contract in Consolidated Invoicing on Cloud.

Please follow the interactive guide below, a written guide is also available at the bottom of the page.


CONTRACT
Here

Embedded media:

https://demo.arcade.software/xsGDplc3taoGXiSVQcK5?embed&embed_mobile=inline&embed_desktop=inline&show_copy_l

Written guide

1. Within the ‘My Hub’ dashboard, click the Consolidated Invoicing app.
2. Next, click the ‘Visit’ button under contracts.
3. Click the ‘Add New Contract’ button.
4. Before you fill out the mandatory fields you also have the option to select an existing contract owner if needed.
5. To create a new owner, select the drop down toggle to find the owner type. In this example, I have picked Private.
6. Next, add the owner name. This is the person responsible for the contract on behalf of the client. In this example – Lisa Taylor is the daughter who is in charge of the contract for her mum’s care. Lisa Taylor will then be the owner name.
7. However, if this was a Local Authority Contract – Owner Name would be the name of the company / local authority. For example – Plymouth City Council would be the Owner Name.
8. Now enter the address of the owner. In this case, this would be Lisa Taylors (the person responsible for the contract) address.
9. For Local Authority Contracts, this would be the address of the authority. For example – if Plymouth City Council is the Owner of this contract , I would use their address.
10. For a private contract, the Contact name will be the owner name, in this case Lisa Taylor.

11. And for Local Authority Contracts, the Contact Name would be the person responsible for the care – the Carer who works for the local authority.
12. Enter the owner's email.
13. Next, enter the owners phone number.
14. Then, click next.
15. You will then need to fill out the contract details tab.
16. You also have the option to tick this box if you wish to use the Owner information that we filled out previous to this. This is normally catered for private contracts.
17. If you decide to manually enter all of the information – for a private contract – this information would be the same as the owner details. For example, Lisa Taylor would be the Contact name, along with her address etc.
18. For Local Authority Contracts, you would fill this out the same way as you did for the Owner Details. For example – Contact name (the person responsible for the care) and Contract Name (The Local Authority name)
19. Enter the details as done previously.
20. Now, you can add the Contract Start Date.
21. Next, select the Notice Period.
22. If you wish to add a Reference Number you can, but this is not mandatory.
23. Enter the address details.
24. Next, click the 'Create Contract' button.
25. You have now completed entering all of the general information for this contract.
26. You also have the option to edit the contract details.
27. Here you will see that you can now add a End Date to the contract if you know this information.
28. Next, click the 'Save Changes' button'.
29. **Top Tip!** It's important to note that you cannot publish the contract without adding the client first.
30. To do this, select the 'Resident' tab at the top of the page next to General Information.
31. Next, find your client. In this case I will be finding Lisa Taylor's mother, Polly.
32. Then, pick the start date of when care begins for Polly.
33. It's important to click the tick box to save this information.
34. Once doing so, you will find this box next to the arrow. This is the Contracted Hours box.

35. Once clicking the box, this tab will appear.
36. Select the ‘Edit’ button to edit the contract hours for the client.
37. Here you can then enter the contracted hours for the client within these dates.
38. You also have the option to add another set of contracted hours between other dates if necessary. You can do this by clicking the ‘Add’ button.
39. Next, click the ‘Save’ button once you are happy with the contract hours for this client.
40. After adding the contract hours for this client, you will need to add a Payment Schedule before publishing the contract.
41. To add a payment schedule, click the ‘Payment Schedule’ button.
42. This tab will then appear. Enter your schedule description.
43. Then, you will need to fill out the invoice frequency. For this example, the invoice frequency will be Weekly on every Monday.
44. Next, enter the hourly payment rate.
45. Now select the chosen payment method.
46. Once filling out all the information, click the ‘Save’ button.
47. You will then be able to publish the contract.