Send Invoices and Receive Payments with Client Billing in Primary Record

Manage a Professional Account · https://www.primaryrecord.com/docs/send-invoices-and-received-payments-with-client-billing-in-primary-record/

For care coordination businesses, the invoicing feature in Primary Record streamlines financial management by providing a fully integrated solution for creating, sending, and tracking invoices without the need for external configurations like setting up a Stripe account. This all-in-one platform ensures that billing is simple and connected—clients can receive invoices directly, view their status in real time, and even pay seamlessly through the system. By consolidating invoicing and payment tracking into the same platform used for client management, care coordinators save time, reduce administrative burdens, and ensure a smoother experience for both their team and their clients.

Follow these steps to send invoices to clients in **Primary Record**:

Step 1: Select a Client

1. Navigate to the **Client List** and select the client you wish to invoice.
2. Click the checkbox next to their name.
3. Click the **Invoice** button at the top of the page.

Step 2: Fill Out the Invoice Details

1. **Review Billing Contact**:
   - The right-hand panel will display the billing contact (default is the primary contact).
   - To change the billing contact, edit it directly in the client's profile or the client list screen.
2. **Add Line Items**:
   - Click **Add Line Item** to start creating an entry.
   - Choose a **type of charge**:

        - **Variable Price**: Enter hours worked and the hourly rate.
        - **Fixed Price**: Enter a set total amount (no calculations required).
    - Specify the **description**, **start and end period**, and **amount**.

    Example:
    - *Variable Price*: 40 hours at $50/hour for November = $2,000,
      or 20 miles at $.25 a mile for November = $5
    - *Fixed Price*: $50 for consulting services in November.

3. Line items will appear in the panel, showing details like the description, period, and total amount.
4. **View the Subtotal**:
    - The subtotal updates automatically as line items are added.
    - Note: Transaction fees may apply and will be reflected in the final amount.

Step 3: Name and Send the Invoice

1. Provide a name for the invoice, such as "Client Invoice - November."
2. Optionally set a due date (e.g., 7 days from now).
3. Click **Send Invoice**.

Once sent, you'll receive confirmation, and the invoice status will update to **Open** in the client's record.

Step 4: Track Invoice Status

1. In the client's profile, navigate to the **Invoices** section to view:
    - Status (e.g., Open, Paid).
    - Date sent and payment details.
2. Activity related to the invoice, such as sending or payment updates, will appear in the **Activity Log**.

Step 5: Manage Sent Invoices

- Select a sent invoice to:
  - **Resend** (via email or text).
  - **Void** the invoice.
  - **Download** as a PDF.
  - Copy a link to share with the client.

Step 6: Client Payment Options

Clients can view and pay their invoices:

1. Directly from the link in their email or text.
2. By accessing the invoice in the **Access** section of their client portal.

They can click **Pay Now** to complete the payment or download a PDF version of the invoice for their records.

Additional Tips

- To find past invoices quickly, search for "Invoices" in the activity feed or use the **Invoices List** in the client profile.
- Ensure the billing contact is accurate for seamless communication and payments.

With these steps, sending and managing invoices in Primary Record becomes streamlined and efficient.