# Getting Started with Alpha Cares

Contents

Welcome!

Welcome to **Alpha Cares!** This is where you'll find a simple step-by-step guide for discovering your way around the Alpha Cares Portal. For the more "feature rich" functions, this help-guide will contain in-depth explanations - all so you can be sure to fully utilize the power of Alpha Cares! Get ready to save time, lower your costs and save money!

Getting Started - New to Alpha Cares

The next section is for those of you who are **New to Alpha Cares** . It is designed to give you the bare essentials for *quickly getting started* with using the software. You will then have to look into the wiki Module pages (online version of this Help Guide) to get more in-depth details.

⭐ **Tip:** To easily follow along, open **2 browsers** (say Internet Explorer, and Firefox or Google Chrome). Read this help-guide in one, and follow the suggested steps with the other! Get **Firefox** at: http://www.mozilla.com/en-US/firefox/ or **Google Chrome** at: http://www.google.com/chrome

Step 1 - Account Information and Family Data
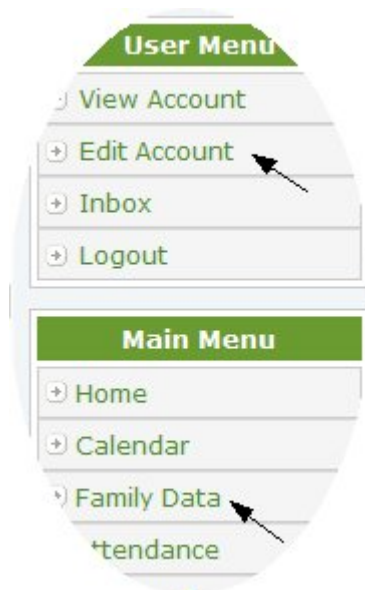
Begin by clicking on **Edit Account** , entering your Business information - like street address, telephone contact, business email, etc. This is critical because parents will receive automated emails; or if you send them PDF versions of their billing invoices - it will contain the business name, address, phone number and return email address you enter here.

Next, click on the **Family Data** link underneath the Main Menu.
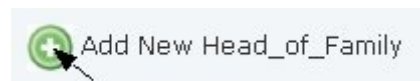
Locate the "Plus" sign and click to add a Family to the address book. Notice the mandatory fields and be sure to enter all of them. The Family

Name is a unique identifier for this family - e.g. Smith (Camden Rd). You can optionally load a picture. The **Head-of-household** is the person with <u>financial responsibility</u> for the payments.

Now you will notice that the name just entered shows up in the data grid. Click on the **Family Record** link to continue adding the rest of the family's information. You can optionally add adults who are guardians of the children under your care. However, in order for the attendance and accounts modules to work, each of the children's names must entered.

Step 2 – Attendance Tracking

By clicking on the **Attendance** link underneath the Main Menu, you will now notice that all the children's names you entered in the Family Data address book appear in this listing. This list is sorted by last names.

Click once = check in, click again = uncheck (delete)

As each child comes to your child care, simply click once on the Check-In icon. It now turns green with the date and time stamp against it, showing that it has been recorded into the database. If a mistake was made, e.g. clicked on the wrong name; simply click on the green check-mark icon again, you will be able to easily delete that entry.
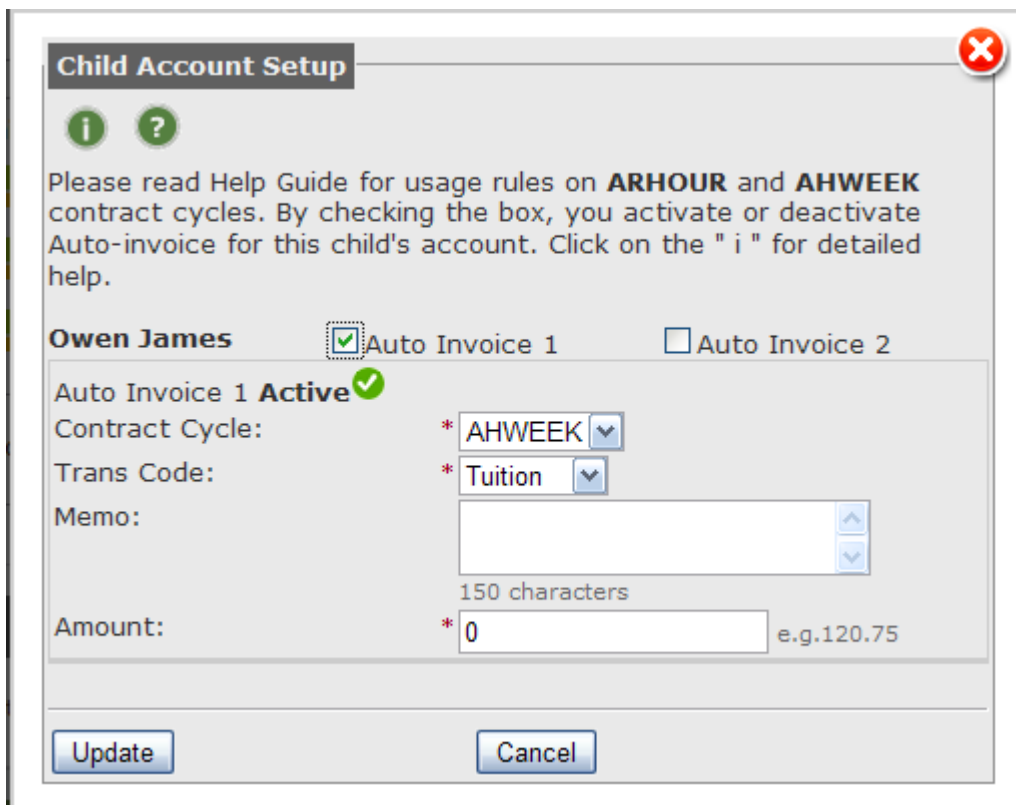
Step 3 - Accounts

When you are ready to invoice and allow Alpha Cares to track payments, click on the **Accounts** link underneath the Main Menu. Notice the

status of **Auto-invoice** , it should be turned **ON**. If it is OFF, simply click on the icon and change/save the setting. Next, click on the **Family Ledger** link for that family. By setting this feature ON, you now have the option of how each child will be billed automatically by Alpha Cares. (If you don't setup any child for Auto-invoice, no invoice will be auto-generated - so don't worry about leaving the Auto-invoice setting ON)

⭐ **Tip:** We'll setup one child with Auto-invoice so you'll see how this works. After the invoice is automatically generated, you can still manually modify or delete it.

To setup Auto-invoice for a child, click on the icon next to the child's name.

Jason Goospar   The Child Account Setup pops up.

Child Account Setup

Please read Help Guide for usage rules on **ARHOUR** and **AHWEEK** contract cycles. By checking the box, you activate or deactivate Auto-invoice for this child's account. Click on the " i " for detailed help.

Owen James   ☑ Auto Invoice 1   ☐ Auto Invoice 2

Auto Invoice 1 **Active** ✓
Contract Cycle: * AHWEEK ▾
Trans Code: * Tuition ▾
Memo:

150 characters
Amount: * 0   e.g.120.75

[Update]   [Cancel]

Uncheck "Auto Invoice 2" since we only need one invoice. Select **AHWEEK** , **Tuition** and enter a weekly billing **amount** . Optionally, include a short note like "Weekly Tuition" in the **Memo** field. This means that we want the system to automatically generate an invoice for this child, in the amount of $120, weekly, ahead of the week.

⚠ **Note:** The system generates **AHWEEK** invoices every Friday at 1AM CST.

Great, we're all set! Now we'll have to wait for Friday to look at what Alpha Cares **Auto-invoice** will do for us. We can also manually enter invoices (**Add Invoice**), or add a payment (**Add Paym**). Notice that you can **Edit** any entry in the family ledger.

 Edit this entry

 Email this invoice or payment

You can also **Email** a PDF version of a payment receipt OR an billing invoice to any adult guardian listed in this family's address book.

At any time as invoices and payments are made, you can click on the **Current Balance** icon to get the up-to-date balance on this family account.

Other Quick Tips

To view your *overall balances on all families* , use the "Print All Family Accounts" icon on the **Accounts** entry page.

If you ever need a snapshot of **outstanding balances** across all family accounts, go to the **Dashboard** link underneath Main Menu. Various important details like: upcoming children birthdays, immunization reminders, and the latest FAQs are all available **at-a-glance**. With this, Alpha Cares strives to make the job of running your child care *much simpler*!