Qunote 3.0

User guide

v1 – February 2020

www.qunote.com

CONTENTS

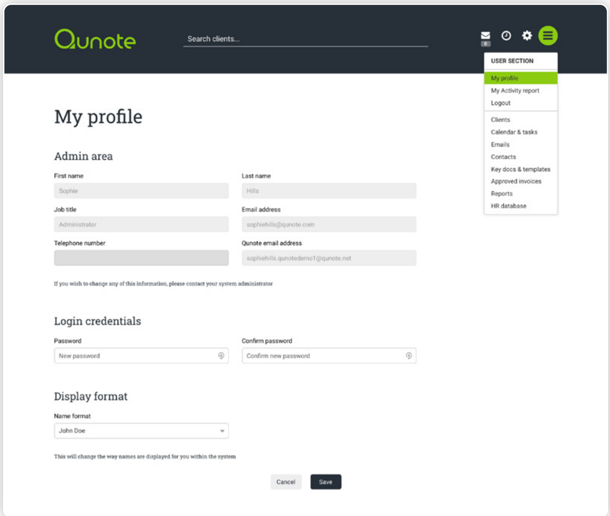
LOG IN, LOG OUT AND RESET MY PASSWORD

To log in to Qunote, visit www.qunote3.net and enter your username and password.

To log out of Qunote, go to **Main menu > Logout**.

If you ever forget your login details, you can either ask your system administrator to reset them for you, or click **I've forgotten my login details on the login page** to reset your password.

Once logged in, you can change your password by going to the **My Profile** page. Enter and confirm your new password in the 'Login credentials' section, and click **Save**. Your password must contain 8 characters or more, including upper and lowercase letters and a number.



HOW DO I FIND MY WAY AROUND?

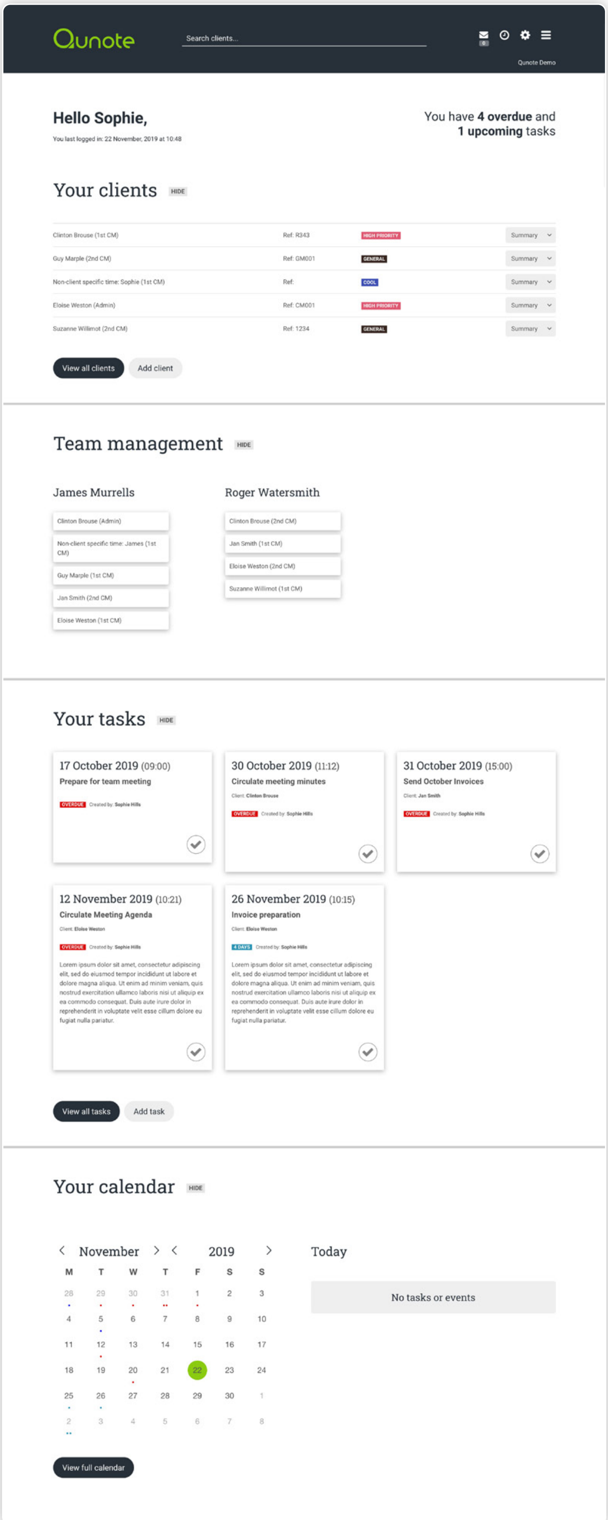
When you log in to Qunote, you will land on your homepage dashboard. From here, you will find:

1. **Your clients:** This displays a list of clients assigned to you. Clicking on a client's name will take you directly to their file.
2. **Team Management:** This area provides an overview of any team members that you supervise, and the clients assigned to them.
3. **Tasks:** Shows your most urgent overdue and upcoming tasks. Click on a task to view full details.
4. **Your calendar:** Shows all of your tasks and events in a handy calendar. Click on a day in the calendar to show full details of your schedule.

You can navigate to different parts of the system from the header bar, which includes the following:

5. **Qunote logo:** Click on the Qunote logo in the top left at any time to return to the dashboard page.
6. **Search bar:** Enter a client's name in the search bar to quickly navigate to their file.
7. **Mail button:** Click the envelope icon to access your Qunote email inbox.
8. **Admin menu (Cog icon):** For navigating the admin area of the system, from which you can customise your system settings and manage users.
9. **Main menu (Hamburger icon):** For navigating the main sections of the system. Access clients, calendar & tasks, emails, contacts, key documents and templates, invoices, client funds, reports & HR database.

Access to the different sections of Qunote is dependent on your assigned permissions levels, so you may not see all of the items covered in this document from your own account.



CLIENTS

In Qunote, you can build detailed client profiles containing personal information, contact details, case details, rates and referral information, with the flexibility to add your own custom fields.

FINDING CLIENTS

Clients assigned to you will appear on your home-page dashboard under 'Your clients'.

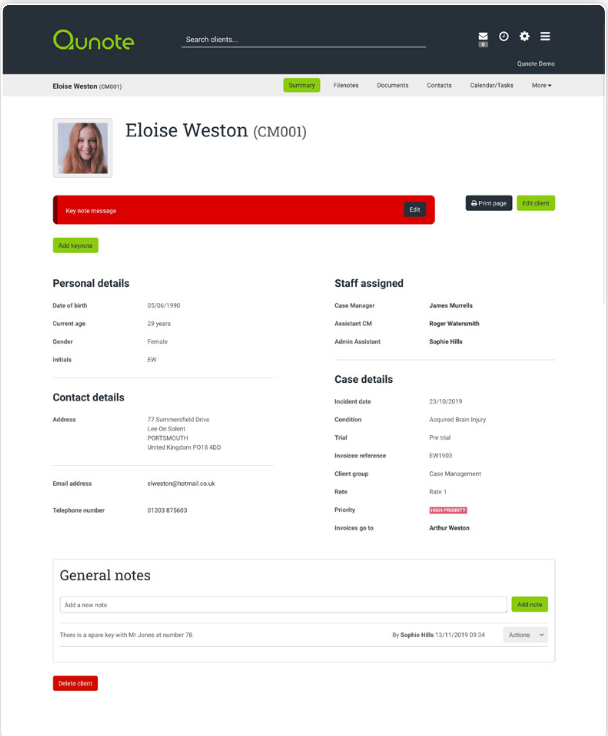
To see a full list of clients to which you have access, go to **Main menu > Clients**. On the **Clients** page, clients are organised into groups. You can access a client's file by clicking the **Summary** button beside their name.

You can search for a client by using the 'Search name' field, or by clicking on the Filter button to reveal a more extensive range of search and filter options.

CLIENT SUMMARY PAGE

The summary page displays the key information about a client:

1. **Personal, contact and case details:** Here you will find all of the client's personal information, contact details and case details, as well as background information on the referral.
2. **Keynotes:** These display prominently at the top of the summary page, ensuring important information (e.g. safeguarding warnings) is not missed. To add a message, click **Add keynote**. You can choose a colour-coded priority status for the message, and update and delete keynotes at any time.
3. **General notes:** At the bottom of the summary page is a section for recording general notes about the client. This might be quick reference notes for employees that are less familiar with the client, or perhaps instructions about access to the client's property.
4. **Reminders:** If you have set up reminders for key dates, these will display at the very top of the client summary page when due.
5. **Print page, Edit client, Delete client:** Use these buttons to print the summary page, edit the client's information, or permanently delete the client from Qunote.



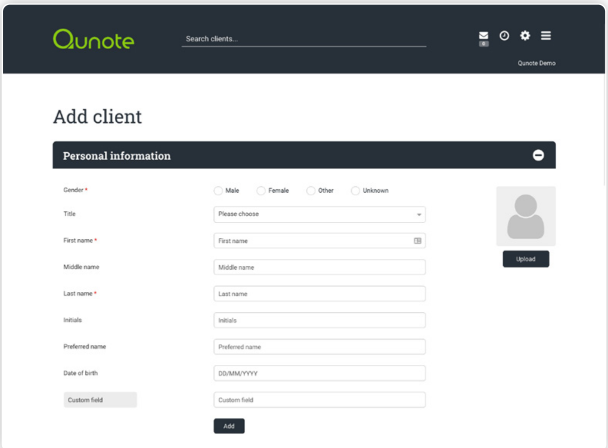
ADDING & EDITING CLIENTS

To add a client, go to the Clients page and click the **Add client** button. You can also access the **Add client** button from your dashboard page.

In the 'Add client' form, enter the client's personal information, contact details and case details, making sure to fill in the mandatory fields marked by a red asterisk, and click **Save**.

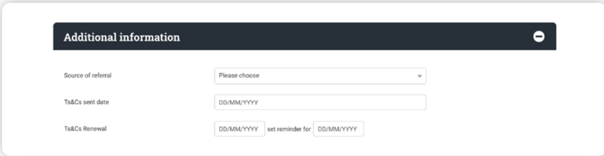
Personal Information

Here you can enter the client's personal details and upload a photo of the client. At the bottom of the section, you can create custom fields to record other information about the client. Simply click the grey label box to define the field name and enter the response in the free-text box beside. You can add further custom fields by clicking the **Add** button.



Additional Information

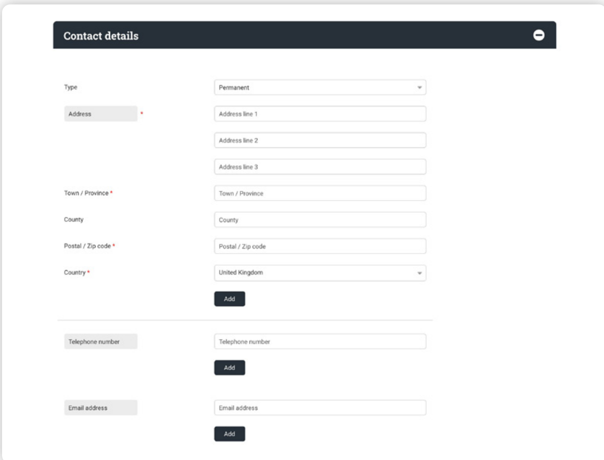
Custom fields that your administrator has set-up for all clients will display in this section. Those that are mandatory will be marked with an asterisk.



Contact Details

Here you can add contact details for the client, including multiple addresses, email address and telephone numbers.

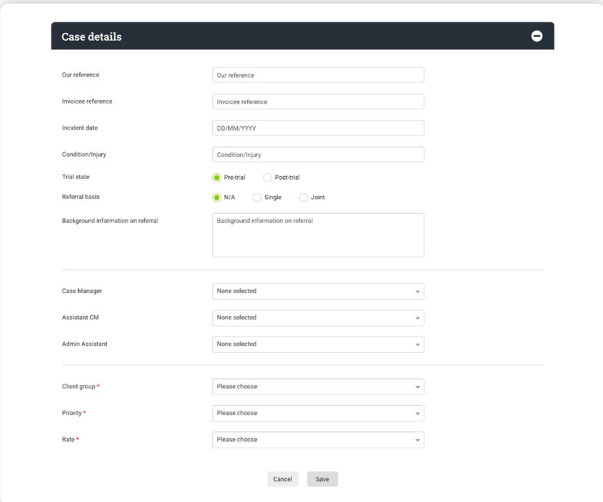
To add an extra set of contact details, click the **Add** button. You can set a custom label for each set of contact details by clicking the grey label box.



Case Details

This area contains details directly related to your client's case, such as the funder, condition, incident date, and reference numbers.

In this section, you can also indicate the staff assigned to the client, specify key contacts for the client, set the client group, and assign the client to a particular set of charge out rates.



DELETING CLIENTS

To delete a client, go to the client's summary page and click the Delete client button at the bottom of the page. This will delete all of the client's information and data, including all of their filenotes.

Please note: Deleting a client will not automatically delete the client's contacts from the system, so you may wish to work through the client's contacts tab and delete each contact/contact association before deleting the client.

ARCHIVE A CLIENT

If you have finished working with a client, but need to retain their information and data on the system, you can archive the client instead of deleting them.

To archive a client, go to their summary page, and click the Edit Client button. On the Edit Client page, scroll down to the Case Details section. In the Client Group field towards the bottom of the page, select the 'Archived' group (created by your system administrator). You will need to re-assign a rate and priority status before clicking Save. Once saved, the client be moved to the 'Archived' group.

You may also wish to remove the users assigned to the client by choosing 'None selected' in the user drop-down fields. Once saved, the client will no-longer appear on dashboard page for any users.

Archived clients remain accessible from the system via the 'Clients' page, where they will be organised under your 'Closed' or 'Archived' client group.

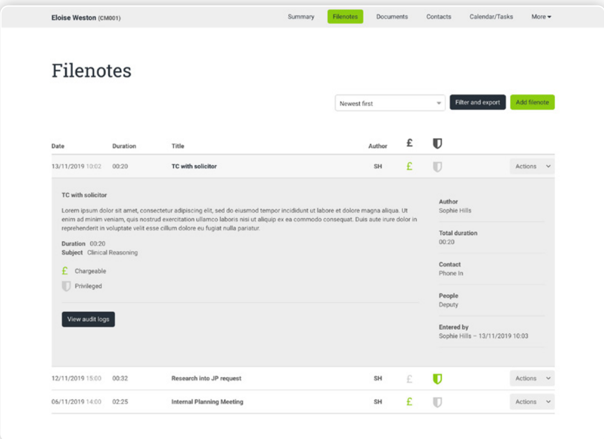
FILENOTES

The Filenotes section of the client file contains all of your clinical notes and time entries. Every time there is an intervention or activity relating to a client, you record the details as a filenote, capturing the associated time, travel time and expenses in the process.

VIEWING FILENOTES

To view a filenote, simply click on its name in the list. The note will expand to show the full details, including the clinical note, date & time, duration, travel time, expenses, mileage, related documentation, chargeable status, privileged status and author.

You can filter notes shown on the page by clicking the **Filter and Export** button at the top of the list. Using the filter options, you can search notes by keyword, or filter by the contact, subject or person categories assigned to the note, the author of the note, the service the note relates to, and the date of the note.



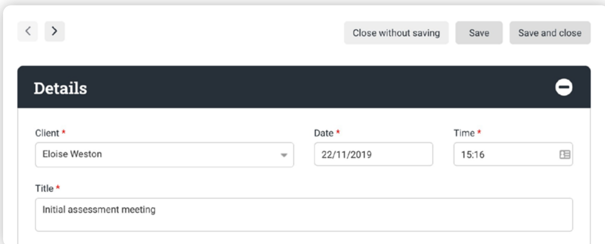
ADDING FILENOTES

To add a filenote, click the **Add filenote** button in the top right hand corner. Fill in the filenote form, and then click the green **Save and close** button.

The filenote form contains the following sections and fields:

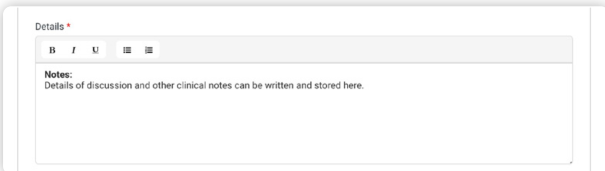
Client, date, time and title

The Client field will pre-populate with the name of the client, so does not need to be changed. In the Date and Time fields, specify the date and time that the activity took place. The Title should be a brief description of the activity, e.g. 'Visit to client' or 'Phone call with solicitor'.



Details

In the Details field, add your full clinical note. There's no limit on the amount of text that you enter into the field, and you can apply basic formatting using the options at the top of the field. Notes are auto-saved regularly to prevent you losing work due to time-out or a dropped internet connection.



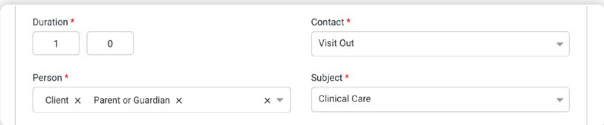
Duration

In the Duration fields, enter the time spent on the activity. If you are billing on a time basis, the system will calculate the charges to the client on the basis of the duration entered here.

Contact, Person and Subject

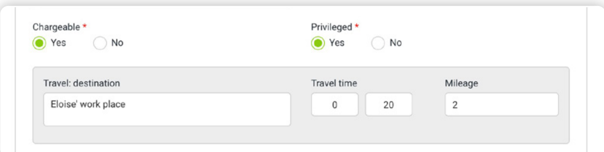
The **Contact**, **Person** and **Subject** drop-down fields are used to categorise your note according to the type of activity (Contact), the topic of the activity (Subject) and the person to which the activity relates (Person). The categories assigned are also used for billing and reporting purposes, so it is important to record them accurately.

The drop-down lists under the Contact, Person and Subject fields can be customised by your system administrator.



Travel Time & Mileage

If you select a contact type that involves travel (such as a visit), an additional section of the form will appear allowing you to record your travel destination, travel time and mileage. The system will calculate travel and mileage charges to the client on the basis of the values that you enter here, and the travel and mileage charge out rates that your system administrator has set up.



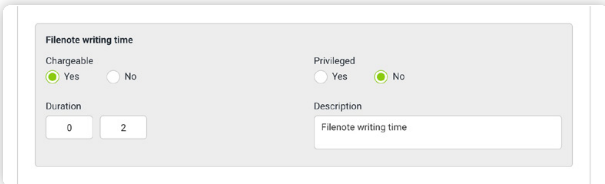
Chargeable and Privileged options

Using the Chargeable option field, you can choose whether the time, travel and mileage recorded on the note is chargeable.

Using the Privileged option field, you can indicate whether the content of the filenote is privileged or not. When exporting notes from the system for disclosure, you have the only to exclude privileged notes from the export, or only include privileged notes in the export.

Filenote writing time

If you charge for time spent writing clinical notes, you can record this within the Filenote writing time section of the form. You can also choose whether this filenote writing time is chargeable or privileged.



Charge and Service

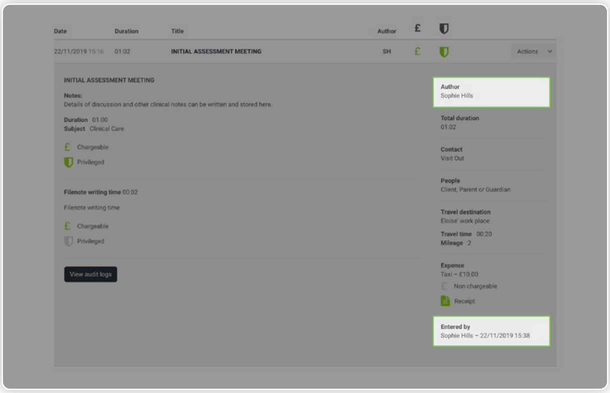
In the Charge field, select the relevant rate to be charged out to the client for the activity. The charge out rates in the drop-down list might be organised according to type of activity (e.g. therapy session; admin etc.) or clinician (e.g. CM, CM Assistant, OT etc.) The list of charge rates will be defined by your system administrator.

In the Service field, select the relevant service that the activity relates to (e.g. Case Management, Medico Legal, Occupational Therapy etc.). If you are offering multiple services to a client, it's important to ensure the service is recorded accurately on each filenote, as this allows a separate invoice to be generated for each service.

Author

If you have permission to record filenotes on another employee's behalf, an Author field will show at the bottom of the filenote form. Select the name of the user who performed the activity from the drop-down list.

Where a filenote is added by one user on behalf of another, the details for the filenote will show the both the name of the user who entered the note, and the user assigned to the note.



Expenses and disbursements

To add an expense to the filenote, click on the black **Add expenses/disbursement** button at the bottom of the filenote form. Enter an amount and description for the expense. You can choose whether the expense is chargeable and mark whether you have a receipt for the expense. Chargeable expenses will be included on the invoice to the client when this is generated.

If you hold funds for a client and have the Client Funds function enabled on their file, you can also record disbursements from the client's funds account from the 'Add expense/disbursement' section of the form. When client funds is enabled, an extra drop-down field will show, allowing you to choose whether the item should be charged to the invoice, or as a disbursement from client funds.

If the item is charged as a disbursement, the value of the item will be deducted from the balance of funds held for the client, which is shown in the Client funds section of the client file.

To add multiple expenses or disbursements to a filenote, simply click the Add another button in the bottom right of the Add expense/ disbursement section.

Add documents

To add or link any related documentation to the filenote, click the **Add documents** button at the bottom of the filenote form. This will open the Add document window.

To link the filenote to a document that has already been uploaded to the client's file, click on the **Link Document** tab at the top of the window. Select the documents you want to link to the note by clicking the **Add** button beside the name of each document in the list.

To upload a new document to filenote, click on the **Upload Document** tab and enter the document details into the form. Click the **Upload file** button and choose the document that you want to upload.

Once you've chosen the document to link to a filenote, or uploaded a new document, click the **Save** button in the bottom right hand corner of the Add document modal.

When the filenote is saved, any linked documents will show under a Related Documents section of the note details. In addition, any documents that have been uploaded via the filenote will show within the Documents section of the client file

Add tasks

To add a follow-up task to the filenote, click the **Add tasks** button at the bottom of the filenote form.

Enter the information for the task, including the person assigned, due date & time, title and details. If you want to add multiple tasks, you can do so by clicking the **Add another** button.

When the filenote is saved, associated tasks will show under a Related tasks section of the note. Tasks will also show within the Calendar/Tasks section of the client file, and the assigned user's Calendar & Tasks page.

EDITING AND DELETING FILENOTES

To edit or delete a filenote, click the **Actions** button to the right-hand side of the filenote to reveal the **Edit** and **Delete** buttons.

EXPORTING FILENOTES

To download a single filenote as a PDF, click the Actions button to the right-hand side of the filenote, and select the Download button from the drop-down.

To export all filenotes within a particular period into a single editable Word document, click on the Filter and export button to the top right of the list of filenotes.

Select the date period that you want to export, and set any additional filters that should apply to the export (for example, you may wish to exclude privileged notes from the export, or only export visit related notes). You can also choose the order that notes are shown in the exported file (newest or oldest first) using the drop-down field above the Filter and export box.

To generate and download the export, click the green Export button.

DOCUMENTS

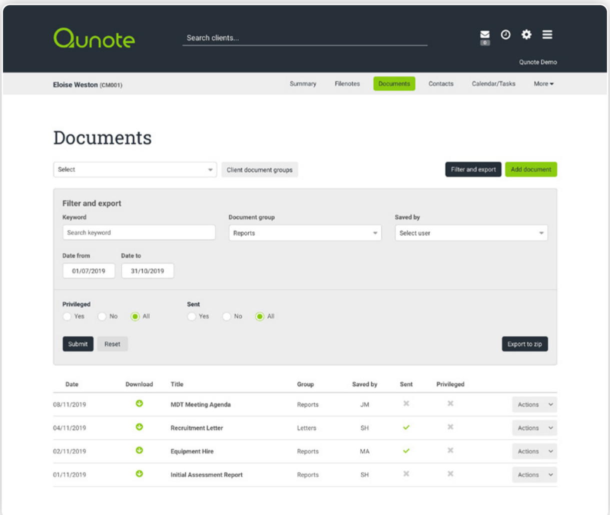
From the Documents section of the client file, you can upload and store all key documentation relating to the client. The system will accept most major file formats, including Word & Excel documents, PDFs, photos, videos and audio.

ACCESSING DOCUMENTS

When on a client's Document page, you can view the full details for a document by clicking on its name in the list. To download a document, simply click the green download button to left-hand side of the document name.

To search for a document, click on the Filter and Export button to reveal the search and filter options. You can search documents by title, date, category and user.

To export all documentation for a particular period, click the Filter and Export button. Enter the date period that you want to export, and click the Export to Zip button. A zip file will download containing all of the documents for your selected period.

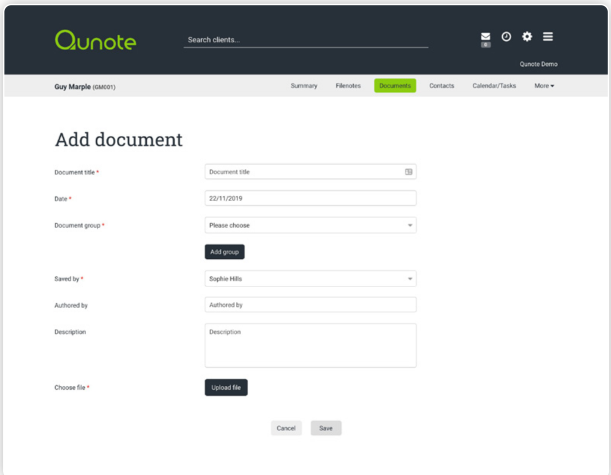


ADDING DOCUMENTS

To upload a document, click the green **Add document** button. When adding a document, you will need to specify the title, date and document category (categories will be set up by your system administrator) . You can add a short description and details of the author. To upload the file itself, click the **Upload file** button and select the relevant file. Once you've added the document details and uploaded the file, click **Save**.

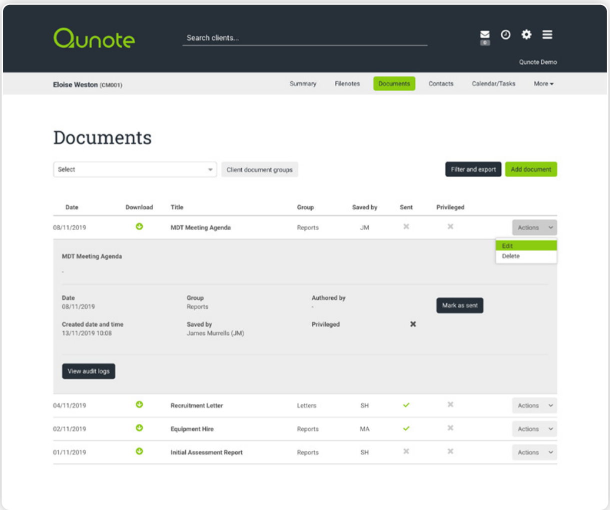
Much like folders, you can create different document categories to help organise your files. When uploading a document, simply choose the relevant document category from the drop-down list.

Your system administrator can also enable the facilities for you to assign documents to client-specific document categories, specify whether a document is privileged, and indicate whether it has been sent to the client.



EDIT OR DELETE A DOCUMENT

To edit or delete a document, click the **Actions** button in the rightmost column of the documents list. The **Edit** and **Delete** buttons will show in the drop-down list.



CONTACTS

You can create an individual address book of clinical, professional, and personal contacts for each client.

VIEWING A CLIENT'S CONTACTS

To view a client's contacts, go to the **Contacts** section of their file.

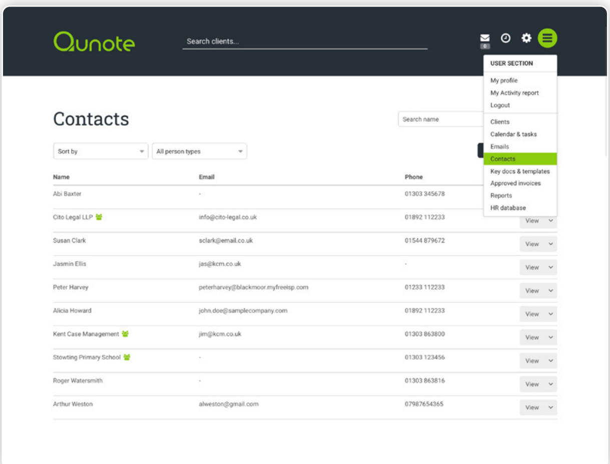
You can search for a contact using the Search name field, or filter the type of contacts shown in on the page (e.g. legal contacts; family) using the **Person type** drop-down.

To view the full details for a contact, click the **View** button to the right-hand side of their name in the list.

VIEW ALL CONTACTS

As well as being able to access a list of contacts for each client, you also have access to a central contacts database containing all contacts for the clients that you are working with, and any contacts that are not client specific.

To access this central contacts database, go to **Main menu > Contacts**.



ADDING CONTACTS

You can add a new contact either from a client's contacts page or from the central contacts database. If a contact is specific to a particular client only, it is best to add the contact from that client's file. If the contact is shared across multiple clients or is not related to any clients, it is best to add the contact from the central contacts database. To add a contact, click the green **Add contact** button.

In the **Add contact** form, choose whether the contact is a company or a person, and then add their personal and contact details. You can add multiple addresses, email addresses and telephone numbers for each contact, and customise the label for each set of details by clicking the grey label box.

If the contact is a person, you can specify the company that they work for from a drop-down list of all of existing company contacts. When you specify that a person works for a company, the contact details for the company will automatically show on the person's contact record, saving you from duplicate data entry.

When adding a contact via a client's file, an additional 'Client specific information' section will show at the bottom of the form. This section allows you to add specific information about the contact's relationship to the client, which will only ever be visible when viewing the contact record from that particular client's file. When viewing contacts from the central contacts database, all client specific information is hidden.

Once you've finished filling out the details in the Add contact form, click **Save** to create the contact.

LINKING AN EXISTING CONTACT TO A CLIENT

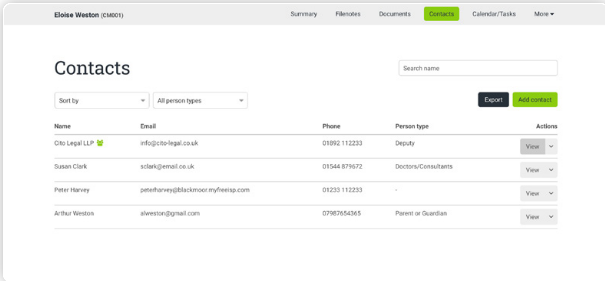
When adding a contact to a client's file, the system will notify you if the contact you are adding already exists in your Qunote account, and give you the option to share the existing contact with the client. This saves you from having to duplicate contacts that are shared across multiple clients.

When the system detects that a contact you are adding already exists, the Similar contacts box will display. To share the existing contact, click on the contact's name, followed by the **Add to [Client name]'s contacts** button. The Add contact form will automatically populate with the contact's details. You can edit these details, but any changes that you make (with the exception of the Client specific information section), will apply across all instances of the contact in the system. Once saved, the existing contact will be shared to the client's file.

You can also share contacts to clients from the central contacts database. When viewing a contact from the central database, the contact record will include a 'Sharing' section, listing the clients that the contact is shared with. In the 'Shared with' field, type the name of the client you wish to link the contact with, and select the client from the matching results. The contact will be shared with the client, and appear in the client's Contacts page.

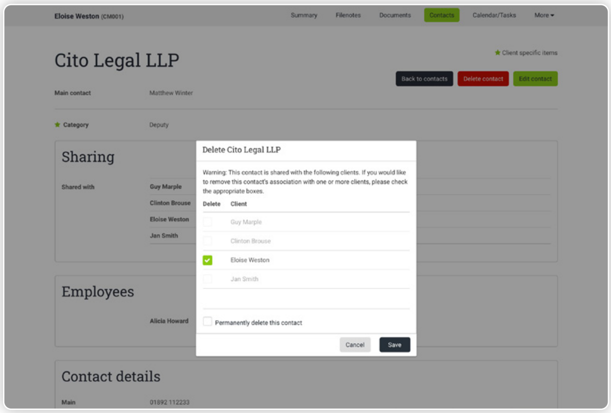
EDITING AND DELETING CONTACTS

When viewing the list of contacts, you can edit or delete each by clicking on the down arrow to the right-hand side of the **View** button to reveal the Edit and Delete buttons. Alternatively, when viewing a contact, you can click the **Edit contact** or **Delete contact** buttons.



If you edit a contact that is shared across multiple clients, any changes that you make (with the exception to the Client specific information section), will apply across all instances of the contact in the system.

If you delete a contact that is shared across multiple clients, the system will give you the option to unlink the contact from one or more of the clients that it is shared with, or delete the contact entirely from the system.



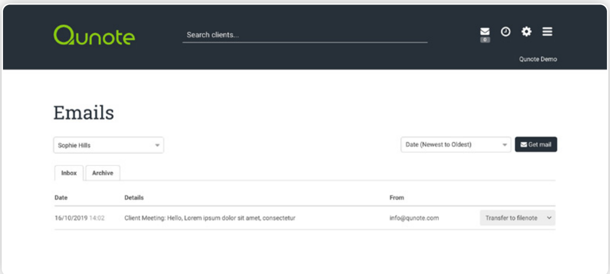
EXPORT CONTACTS

You can export contacts from a client's file or the central contacts database by clicking the Export button. This will generate an Excel file containing all contacts and their details.

EMAILS

Qunote's Email to filenote facility allows you to send client-related emails directly into the system, and then quickly save these to the relevant client files.

Your system administrator will provide you with a Qunote email address to use to send emails into the system. Thereafter, if you receive an email that you want to save to a client's file in Qunote, you simply need to forward it on to your Qunote email address. If you are sending an email that you want to save to a client's file within Qunote, simply copy or blind copy your Qunote email address.

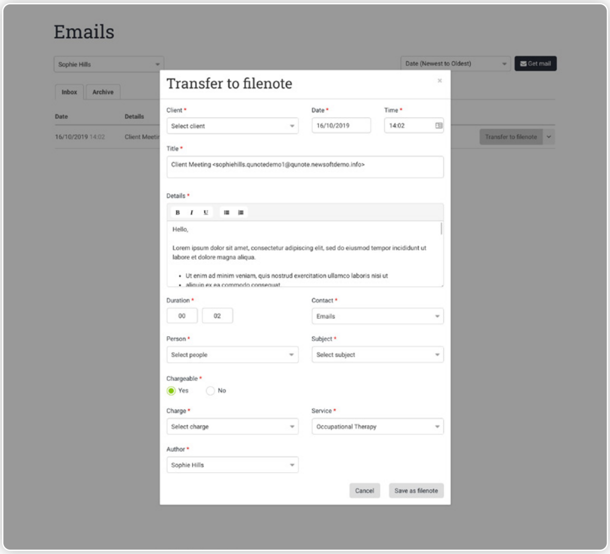


Any emails that you send into Qunote will show within your Qunote email inbox, which can be accessed by clicking the mail icon in the header, or **Main menu > Emails**.

SAVING AN EMAIL TO A CLIENT

To save an email to a client's file, click the Transfer to filenote button on the right hand side. In the Transfer to Filenote form, select the client that the email relates to, and fill in the rest of details, such as the duration, chargeable status and subject category. The date and time fields will be pre-populated based on the date and time that the email was received into the system, and the Title and Details fields will be pre-populated with the subject and content of the email, but you can edit these should you wish.

Your system administrator can set up default values for more fields in the Transfer to filenote form, making the process of saving email to client files even quicker.



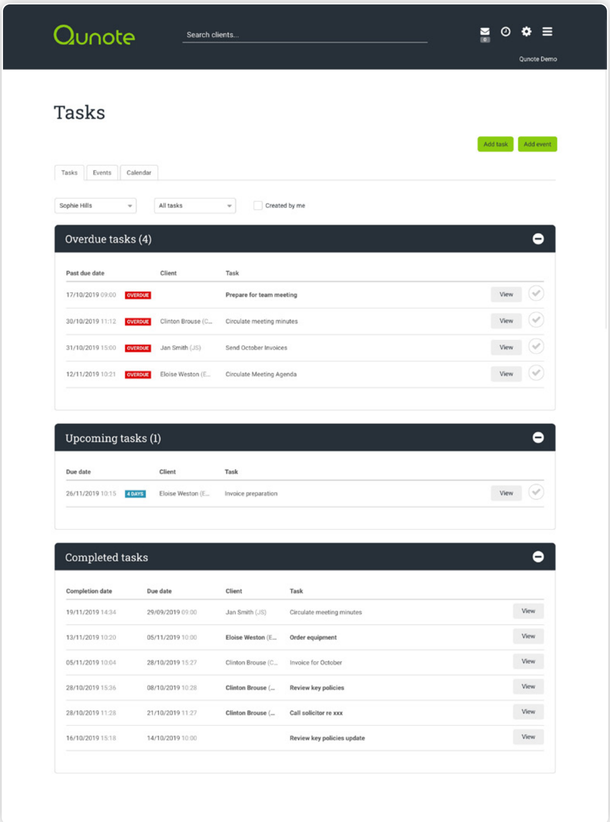
If the email includes attachments, these will be shown in an Attachments section at the bottom of the Transfer to filenote form. If you want to transfer an attachment to the client's file, choose the document category to which the attachment relates from the Select category drop-down. If the email includes an attachment that you don't want to transfer to a client's file, click the button to the right-hand side of the attachment to remove it from the list.

Once you've completed the form and chosen any attachments to be transferred, click the green **Save as filenote** button in the bottom right corner. The email will be saved as a filenote on the selected client's file. Any transferred attachments will show as Related Documents on the created filenote, and appear within the Documents section of the client's file.

CALENDAR & TASKS

The Calendar & tasks section of the system allows you to create and manage tasks and events, and view your schedule within a calendar.

To view all of your tasks and events across all of the clients that you are working with, go to **Main menu > Calendar & tasks**. In addition, each individual client file contains a dedicated 'Calendar/ tasks' section, containing only tasks and events relating to them.



The Tasks page is organised into different sections for Overdue, Upcoming and Completed tasks, and the Events page is organised into different sections for Upcoming and Past events. You can use the filter options at the top of each page to filter the tasks and events shown by the user assigned, the client that the task or event relates to, or to show only tasks or events that you have created.

VIEWING, EDITING AND DELETING TASKS

To view the full details for a task, click the **View** button on the right-hand side of its title in the list.

From the Task details page, you can view full details for each task, and add notes detailing progress. You can mark the task as complete by clicking the tick button in the top right hand corner.

To edit a task, click the **Edit task** button in the top right. To delete a task, go to the Edit task page and click the black **Delete** button at the bottom of the page.

ADDING TASKS

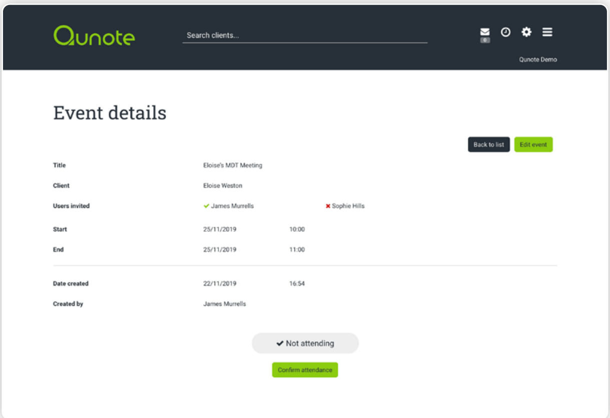
To add a task, click the **Add task** button in the top right hand corner of the Calendar & Tasks page.

Enter the details for the task in the Add task form, including the title, the client to which it relates (if applicable), the users assigned to the task, the due date and details. If assigning the task to somebody else, you can also choose to receive a notification on your dashboard page when they mark the task as complete.

When you create a task, the users assigned will each receive a notification on their dashboard pages.

VIEWING, EDITING AND DELETING EVENTS

To view the full details for an event, click the View button on the right-hand side of its title in the list.



From the Event details page, you can view full details for each event, including who is attending, and mark whether you will be attending the event or not via the **Confirm attendance** and **Cannot attend** buttons at the bottom of the page.

To edit an event, click the **Edit event** button in the top right. To delete an event, go to the Edit event page and click the **Delete** button at the bottom of the page.

ADDING EVENTS

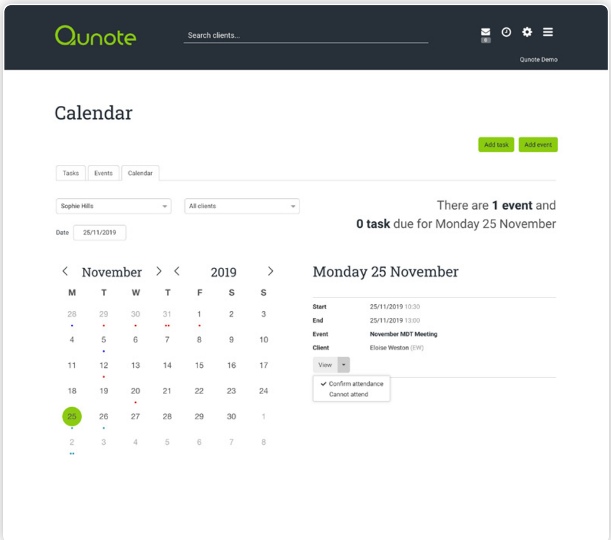
To add an event, click the green **Add event** button in the top right hand corner.

Enter the details for the event in the Add event form, including the title, the users invited, the client to which it relates (if applicable), and the date and time.

Any users invited to the event will receive a notification on their dashboard page, and will be able to mark whether they are able to attend the event or not.

CALENDAR

The Calendar page allows you to view your schedule within a monthly calendar. In the calendar, days where there are tasks due or events taking place are be marked with a dot.



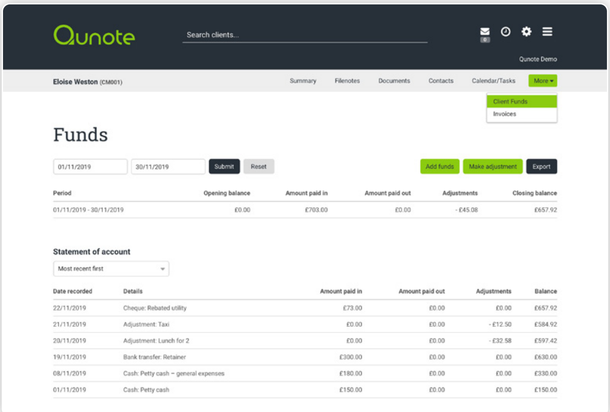
Click on a day in the calendar to view details of all tasks and events scheduled for that day.

CLIENT FUNDS

If you hold funds on behalf of clients, your system administrator can enable a Client Funds facility, allowing you to track the balance of client funds held for each client from the system. Once enabled, you can view and manage a client's funds account from the Client Funds section of their client file.

VIEWING CLIENT FUNDS

At the top of a client's Client Funds page, an overview of their funds balance for the date period specified is displayed. If you change the date period via the fields at the top of the page, the opening balance, activity and closing balance will update to reflect this.



At the bottom of the Client Funds page is a full Statement of account. This lists all transactions for the client's funds account, including funds added, adjustments and disbursements, as well as a running balance.

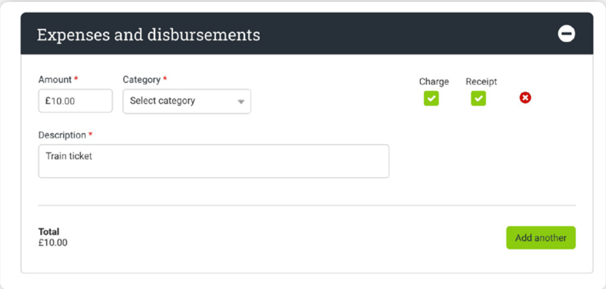
ADDING OR ADJUSTING CLIENT FUNDS

If you receive a payment towards a client's funds, you can record this from the Client Funds page by clicking the **Add funds** button in the top right-hand corner. Enter the transaction date, the method of receiving the funds (e.g. cheque or bank transfer), reference and amount. Once saved, the credit of funds will be shown within the client's 'Statement of Account', and their funds balance will be updated accordingly.

If you need to make an adjustment to a client's funds balance, click the green **Make adjustment** button in the top right hand corner. Specify the direction of adjustment (add or deduct), amount, and reason for the adjustment. Once saved, the adjustment will be shown within the client's Statement of Account, and the funds balance will be updated accordingly.

RECORD DISBURSEMENT FROM CLIENT FUNDS

Disbursements from client funds can be recorded when adding filenotes, via the Add expense/ disbursement section of the form. When client funds is enabled, an extra drop-down field will show, allowing you to choose whether the item should be charged to the invoice, or as a disbursement from client funds. If the item is charged as a disbursement, the value of the item will be deducted from the balance of funds held for the client, and the disbursement will show within the Statement of Account.



EXPORT CLIENT FUNDS STATEMENT

To export a full client funds statement for a client, specify the period that you want to export via the fields in the top left, and click the **Export** button in the top right-hand corner. The funds statement will be exported as an Excel file.

CLIENT FUNDS OVERVIEW

You can view an overview of all client funds held by going to **Main menu > Client funds**. The overview page displays a total balance of funds held across all clients, and a breakdown of funds activity by client for the period specified.

INVOICES

At the end of your billing period, you can generate an invoice for each client directly from Qunote. The fees charges will be based upon the activity that you have recorded within a client's filenotes, and the charge out rates set up by your system administrator.

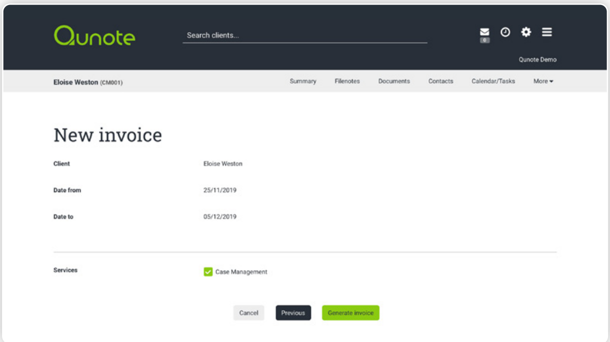
SETTING A CLIENT'S INVOICE CONTACT

Before generating your first invoice for a client, you need to add details of the client's funder, and assign them as the invoice contact. create and assign their 'Invoice contact'. To do this, go to the Contacts section of the client's file, and add the funder as a contact. Then go to the Client Summary page and click the **Edit client** button. Scroll down to the Case Details section and select the name of the funder from the **Invoice contact** drop-down field. Finally, click **Save** at the bottom of the page.

If the client is self-funded, you can specify this by selecting the 'Invoice client directly' option from the Invoice contact drop-down field.

CREATING AN INVOICE

To generate an invoice for a client, go to the Invoices section of the client's file, and click the **New invoice** button in the top right-hand corner.



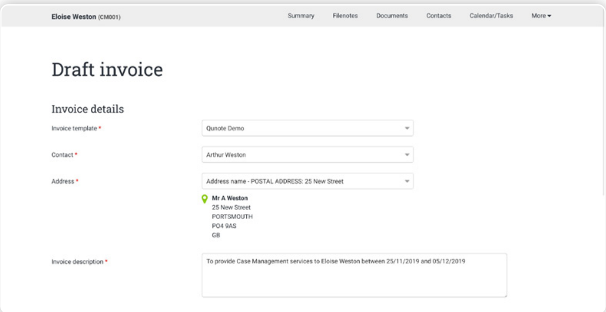
In the 'New invoice' form, select the period that you want to invoice and click **Next**. You can then select the services that you want to include on the invoice by ticking the relevant check-boxes. Only activity and charges related to the services that you select will be included on the invoice, thereby allowing you to generate separate invoices for different services if required. In addition, the 'Expenses' check-boxes allow you to choose whether to include expenses on the main invoice, or generate a separate invoice for these. Once you've selected the services and expenses to include on the invoice, click the **Generate invoice** button to generate your draft invoice.

DRAFT INVOICE

At the Draft invoice stage, you can the edit content of the invoice prior to finalising it, including the invoice details, the titles of invoices line, and the amounts and items charged for.

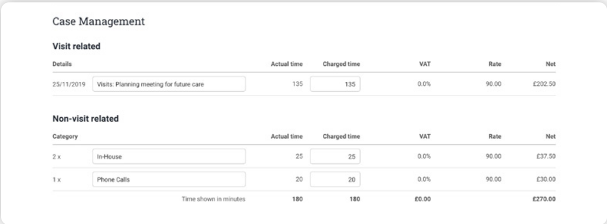
The Draft invoice form contains the following sections:

Invoice details



In the Invoice details section, you can choose the invoice template to use, select a different invoice recipient (if the invoice needs to be addressed to somebody other than the usual invoice contact), and edit the invoice description that shows at the top of the final PDF invoice. The invoice description will pre-populated based on the default message set by your system administrator.

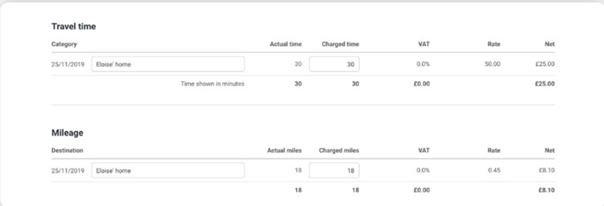
Time & Activity



The main content of your invoice will be shown within this section, as it includes charges for the time and activities recorded in filenotes. The format, grouping and layout of items will be determined by the invoice layout settings chosen by your system administrator Your invoice might be laid out so that each individual filenote is itemised, or filenotes may be grouped onto invoice lines according to the type of activity (e.g. phone calls, emails etc.) and charge rate.

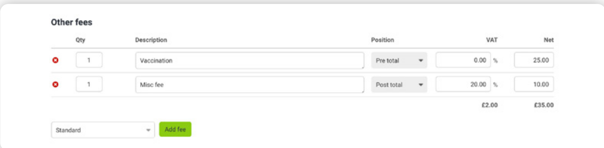
For each invoice line, an invoice line title, duration recorded, duration charged (this may differ from the actual duration recorded if rounding is enabled), VAT rate, chargeable hourly rate and net total is shown. You can edit each invoice line title if required, and edit the duration of time charged for each line. If you edit the duration of time charged, the net total for the invoice line will update to reflect this.

Travel & Mileage



Chargeable travel and mileage recorded on filenotes will be shown within this section, itemised onto individual invoice lines. For each invoice line, a date, line title (destination), charged travel time duration/ number of miles, VAT rate, hourly/per mile rate, and net value is shown. You can edit each invoice line title if required, and travel time or mileage charged.

Other fees



The Other Fees section allows you to include ad hoc fixed fee items on the invoice, such as report or assessment charges.

To add an item, set the drop-down field to 'Standard' and click the green **Add fee** button. You then need to specify the quantity, description, VAT rate, and net total for the item, as well as where you would like the item to appear on the final invoice (pre- or post the invoice total).

Your system administrator may have set-up some template 'Other fee' items from the admin area. To quickly add these to the invoice, click on the drop-down field and select the item you want to add.

You can add as many 'Other fee' items to the invoice as required. Just click the **Add fee** button to add further items.

Expenses

Any expenses recorded on filenotes will be shown within this section, itemised onto individual invoice lines. For each expense, the date, description, VAT rate and net total will be shown. You can edit the description and net total for each expense, or remove the expense entirely from the invoice by clicking the button on the left-hand side.

Invoice note

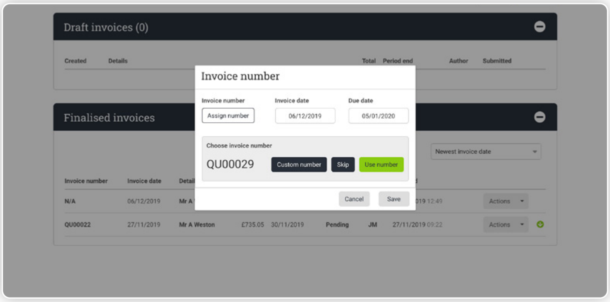
From here, you can add a note that will show at the bottom of the final PDF invoice. For example, you might include 'Please pay your three outstanding invoices'.

Internal note

From here, you can add a note that does not display on the final PDF invoice itself, but displays against the details for the invoice in the system, and so can be used for internal communication. For example, you might include 'Funder is very slow at paying invoices, chase regularly'.

FINALISING AN INVOICE

When you've finished checking and editing your draft invoice, you can finalise it by clicking the green **Finalise** button at the bottom of the form. Immediately after finalising an invoice, a pop-up will display allowing you to set the invoice date, due date, and invoice number. The system will suggest the next sequential invoice number for you to use.



When an invoice is finalised, any filenotes and expenses included on the invoice are marked as 'invoiced', and will not be included on any future invoices that you generate for the same period. This prevents any accidental double-billing of activity. In addition, filenotes that have been invoiced are locked for editing except by super-admin users.

Finalised invoices are shown within the Finalised invoices section of the client's Invoices page. To download an invoice as a PDF, simply click on its **invoice number** on the left-hand side

Additional options can be found in the **Actions** drop-down to the right-hand side of each invoice, including:

- **Edit invoice:** Allows you to edit certain invoice details, including the date, due date, invoicee reference and invoice note. You can also view and add internal invoice notes.
- **Delete invoice:** If you delete an invoice, any filenotes or expenses included on the invoice will be marked as not invoiced. This will allow you to re-run an invoice for this activity.
- **Email invoice:** Allows you to email the invoice to the specified invoice contact (and other recipients) directly from the system.
- **Download breakdown:** This generates an Excel document containing an itemised list of each individual filenote included on the invoice. For each filenote, the recorded date & time, title, duration, travel time and mileage is shown. This is useful if you send invoices with activity grouped by type, but the funder wants to see a more detailed breakdown of what has been billed.
- **Download filenotes:** This generates a Word document containing all of the filenotes included on the invoice. The date, time, title and full details of each note is included.

You can record and track the payment status (e.g. paid, overdue, refunded etc.) of each invoice via the Status column. To update the payment status of an invoice, click on the current status and select the new status from the drop-down list.

APPROVED INVOICES

The 'Approved Invoices' page contains a list of all finalised invoices across all clients. You can access the page by going to **Main menu > Approved invoices**.

To filter the invoices shown on the page by client, payment status or date, click the **Filter** button in the top right-hand corner of the page.

KEY DOCUMENTS AND TEMPLATES

To access your organisation's templates or key documentation (e.g. policies), go to **Main menu > Key docs & templates**.

Any templates or key documents that your system administrator has uploaded will be shown on the page. To view the documents within a particular category, click on the name of the category to expand the list. To download a file, just click on its name.

You can search for a particular template or document using the search bar at the top of the page, or filter the documents shown by file type using the drop-down.

REPORTS

Qunote contains a number of out-of-the box reports covering client information, time and activities, filenotes and billing.

If your system administrator has granted you use these reports, you can access them by going to **Main menu > Reports.**

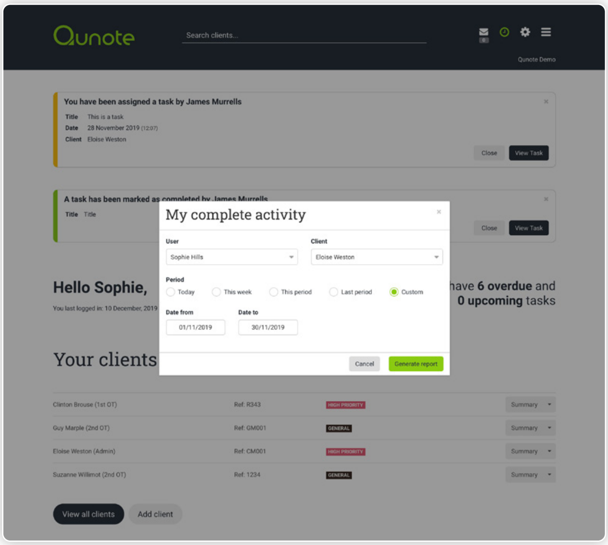
A short description is provided for each report detailing its purpose and output. To run a report, simply click on it. When viewing a generated report, you can print it or export the data to Excel using the buttons in the bottom right hand corner.

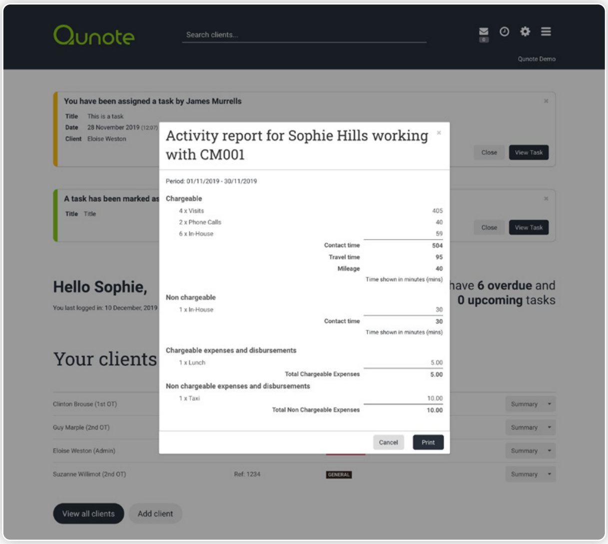
MY COMPLETE ACTIVITY REPORT

If you are employed as an associate and need to see a breakdown of your time, travel and mileage recorded in order to compose your invoice, your system administrator can give you access to the ‘My Complete Activity Report’.

To run the ‘My Complete Activity report’, click on the clock icon in the header or go to **Main menu > My Activity report**.

To generate the report, select the client that you have been working with, and specify the date period to include. The generated report provides a breakdown of all chargeable and non-chargeable time, travel, mileage and expenses that you have recorded in filenotes during the specified period. You can print the report by clicking the Print button in the bottom right hand corner.





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