



Providers of PT, OT, ST, & MSW Services

## INVOICE ALTERNATIVE

Here is a free invoice maker that we found. When creating your account, please note that there are other features on this website, but you do have to pay for them. The one part of their website that we are recommending for you is the free portion.

Here is the link to begin:

[https://www.freeinvoicecreator.com/?ref=ppc&kw=%2Bfree%20invoices&mt=b&ntwk=g&ap=1t1&dv=c&camp=FIG%20%20Search%20\(USD\)&ag=Free%20Invoices%20%3E%20BRD&gclid=Cj0KEQIA6JemBRC5tYLRwYGcwosBEiQANA3IB7MaDPwB5TVdqMspDiHhqs2ahO0I5qfEkMQmykFfM9IaAhhM8P8HAQ](https://www.freeinvoicecreator.com/?ref=ppc&kw=%2Bfree%20invoices&mt=b&ntwk=g&ap=1t1&dv=c&camp=FIG%20%20Search%20(USD)&ag=Free%20Invoices%20%3E%20BRD&gclid=Cj0KEQIA6JemBRC5tYLRwYGcwosBEiQANA3IB7MaDPwB5TVdqMspDiHhqs2ahO0I5qfEkMQmykFfM9IaAhhM8P8HAQ)

You will get the following window:

The screenshot shows the 'Free Invoice Creator' website interface. The main heading reads 'Welcome to the fastest, easiest way to create and send invoices, and *it's free!*'. Below this, three bullet points list features: 'Create professional looking invoices in seconds', 'Send it to your clients via email and know the second they see it', and 'Save a PDF copy for your records'. A green button labeled 'Create Your Invoice' is prominently displayed at the bottom. A red arrow points from the text 'Click HERE to begin.' to this button. Another red arrow points from the text 'ITS FREE!' to the 'Free Invoice Creator' logo in the top right corner of the interface. The background shows a blurred view of the website's form fields, including 'Bill From' and 'Bill to' sections.





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The next window will be:

**FRESHBOOKS** Free Invoice

Need help? Call toll free: 1.866.303.6061  
FreshBooks is used by over 5 million. [Contact Us](#)

What's your billing address?  
Enter your billing address so your clients know where to send their payments.

**Bill From (your address):**

Your Company Name  
Street Name  
City Zip/Postal Code  
Country State/Province

All fields are required [Next](#)

Fill in the essentials

1. Add your billing address
2. Add your client's address
3. Describe your work

[Save and Send](#)

Complete steps 1-3 before you send

Want to super-charge your invoice?

Invoice Number: 0000001  
Date: January 26, 2015  
Amount Due: \$0.00

Fill in YOUR Billing Info (After Your Finished - Click on NEXT)

The next window will be:

**Bill From:**  
Jane Doe, RPT

Who will be paying you?  
Enter your client's billing address so we know where to send your invoice

**Bill to (your client's address):**

Your Client's Company Name  
Street Name  
City Zip/Postal Code  
Country State/Province

All fields are required [Next](#)

Fill in the essentials

1. Add your billing address ✓
2. Add your client's address
3. Describe your work

[Save and Send](#)

Complete steps 1-3 before you send

Want to super-charge your invoice?  
Complete steps 1-3 to unlock

Item	Description	Unit Cost	Qty	Tax	Tax	Line Total
e.g. Fertilizer	e.g. Super strength lawn care		1			0.00
<a href="#">+ Add Line</a>						
Subtotal						\$0.00
Total (USD)						\$0.00

**\$0.00**  
Balance (USD)

Fill in the Center for Physical Therapy, Inc. information. (After Your Finished - Click on NEXT)





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Here is our company information:

**Bill to (your client's address):**

Center for Physical Therapy Services, Inc.	
1650 E. Walnut Street	
Pasadena	91106-1619
United States	California

All fields are required **Next**

The next window will be:

Center for Physical Therapy Services, Inc.

**Describe your work**

What work are you charging for? You can add lines to your invoice for billable items or time entries.

Item	Description	Unit Cost	Qty	Tax	Tax	Line Total
PT Evaluation	1/1/15, Max Smith, Allied Home Health Care, Inc., 1/10	30.00	1	-	-	30.00
PT Evaluation	1/3/15, Samantha Jones, Universal HHC, 1/7	30.00	1	-	-	30.00
PT Treatment	12/14/14, Mary Akins, Excellent Home Health Care, 3/7	30.00	1	-	-	30.00
PT Treatment	12/18/14, Mary Akins, Excellent Home Health Care, 4/7	30.00	1	-	-	30.00
PT Treatment	12/20/14, Mary Akins, Excellent Home Health Care, 5/7	30.00	1	-	-	30.00
PT Discharge	1/20/15, Bryan Adams, TLC Home Health Care, 12/12	30.00	1	-	-	30.00

[+ Add Line](#)

Invoice Number: 000001  
Date: January 26, 2015  
Amount Due: \$180.00

**Fill in the essentials**

- Add your billing address
- Add your client's address
- Describe your work

**Save and Send**

Complete steps 1-3 before you send

Want to super-charge your invoice?  
Complete steps 1-3 to unlock

\$180.00

Balance (USD)



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This is where you will put in your information of what work you will be billing to the Center for Physical Therapy Services, Inc. In the example above I have inputted the following:

Item	Description	Unit Cost	Qty	Tax	Tax	Line Total
PT Evaluation	1/1/15, Max Smith, Allied Home Health Care, Inc., 1/10	30.00	1			30.00

Under ITEM, I put what was the Service being billed is; PT Evaluation vs PT Treatment vs PT Discharge and so forth.

Under DESCRIPTION, I put the DATE OF THE SERVICE, the PATIENT NAME, the HOME HEALTH AGENCY NAME, and VISIT NUMBER DONE OUT OF THE TOTAL NUMBER OF VISITS

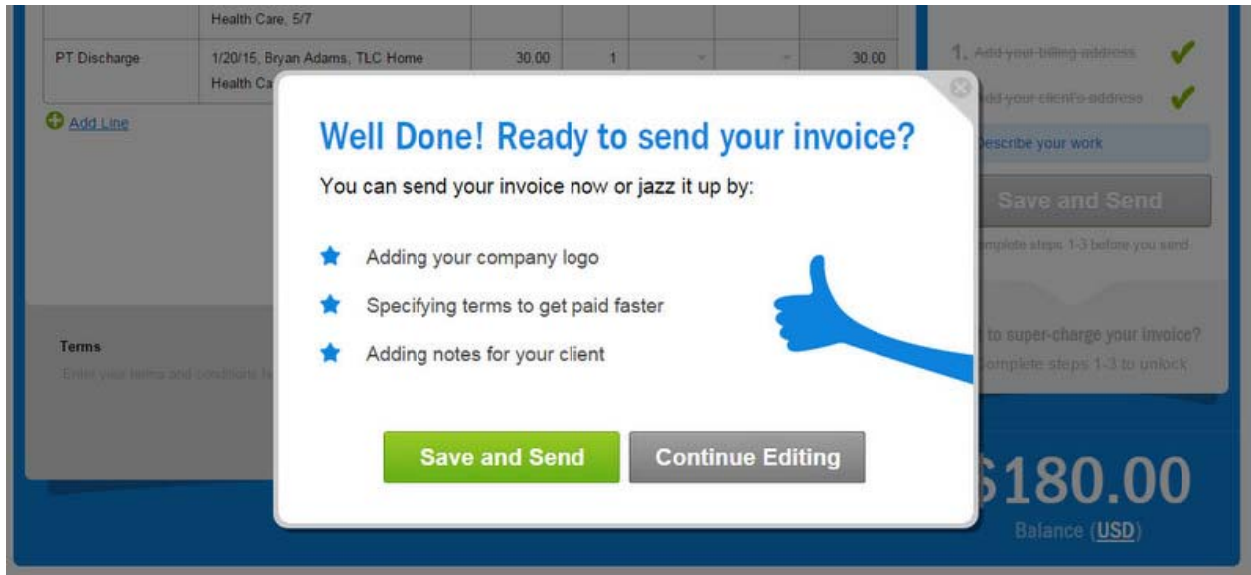
Next, CLICK:



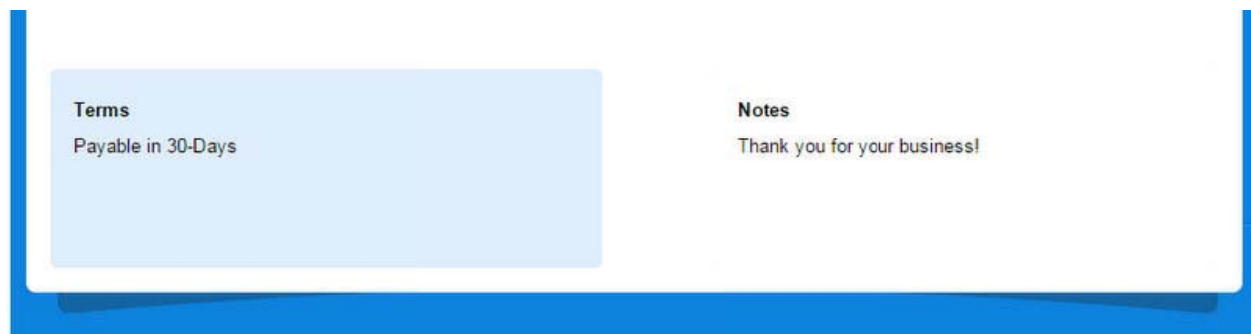


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The next window that you will see is:



If you click on CONTINUE EDITING you will be asked to fill in the TERMS and the COMMENTS section and insert your own LOGO on the invoice. Here is an example of this:





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**Bill From:**  
Jane Doe, RPT  
1234 Anywhere Street  
Some City 91111  
United States California

**Bill to:**  
Center for Physical Therapy Services, Inc.  
1650 E. Walnut Street  
Pasadena 91106-1619  
United States California

**Invoice Number:** 0000001  
**Date:** January 26, 2015  
**Amount Due:** \$180.00

Item	Description	Unit Cost	Qty	Tax	Tax	Line Total
PT Evaluation	1/1/15, Max Smith, Allied Home Health	30.00	1	-	-	30.00

**Fill in the essentials**

1. Add your billing address ✓
2. Add your client's address ✓
3. Describe your work ✓

**Save and Send**

Compose your email on the next step.

**Now super-charge your invoice!**

- [Upload your logo](#) ✓

If you click on SAVE & SEND or you click on CONTINUE EDITING, you will get the following window:

Fill in Your Email Address, Your First Name, Your Last Name

For the TO:  
**ralph@center4pt.com**  
[ALL LOWERCASE]

**Customize your email before you send**

**From:**

**To:**

**Subject:**

To view your invoice from Jane Doe, RPT for \$180.00, or to download a PDF copy for your records, click the link below:

<https://yourcompanyname.freshbooks.com/view/XXXXX> ?

Best regards,  
Jane Doe, RPT

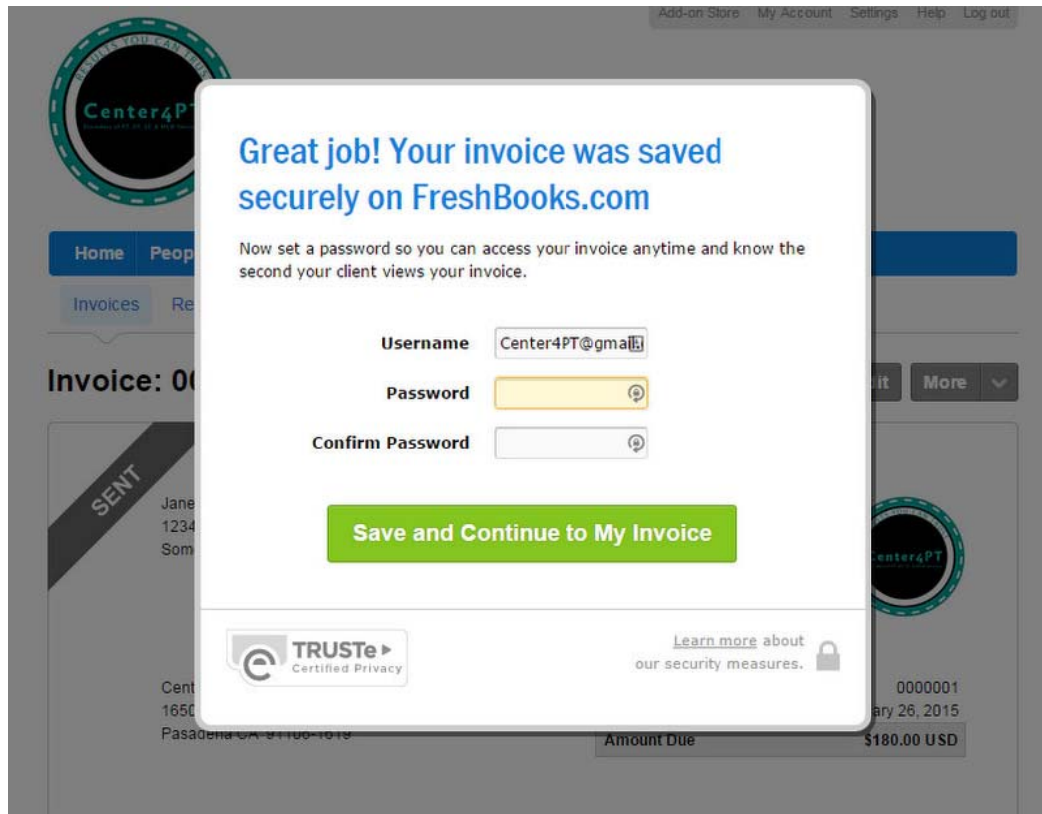
**Send Invoice** or [save as PDF](#)

By selecting "Send Invoice" you agree to our [Terms of Service](#) and [Privacy Policy](#)

Remember me on this computer

Then Click on: SEND INVOICE

Next, after you click on SEND INVOICE, you will be directed to input a password:



The screenshot shows a web interface with a central white modal box. The modal box contains the following text and elements:

- Header: **Great job! Your invoice was saved securely on FreshBooks.com**
- Text: Now set a password so you can access your invoice anytime and know the second your client views your invoice.
- Form fields:
  - Username: Center4PT@gmail.com
  - Password: [Yellow input field with eye icon]
  - Confirm Password: [White input field with eye icon]
- Button: **Save and Continue to My Invoice** (Green)
- Footer: TRUSTe Certified Privacy logo and [Learn more about our security measures.](#)

The background shows a blurred interface with a 'Home' button, 'Invoices' link, and an invoice summary for 'Jane' with an amount due of '\$180.00 USD'.


Afterwards, you will get a notice that states that your invoice was sent. It also will have an interface for you to begin looking at your invoices.





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Admin Show My Account Settings Help Logout




Home People **Invoices** Estimates Expenses Time Tracking Reports More

Invoices Recurring Received Payments Credits Items

**Invoice: 0000001** Enter Payment Edit More

**SENT**

Jane Doe, MPT  
1234 Anywhere Street  
Some City CA 91111



Center for Physical Therapy Services, Inc.  
180 E. Walnut Street  
Fresno CA 91705-1819

Invoice # 0000001  
Invoice Date January 28, 2015  
**Amount Due \$180.00 USD**

Item	Description	Unit Cost	Quantity	Line Total
PT Evaluation	1/1/15, Max Smith, Allied Home Health Care, Inc., 1/10	30.00	1	30.00
PT Treatment	12/14/14, Mary Akers, Escalante Home Health Care, 3/7	30.00	1	30.00
PT Treatment	12/18/14, Mary Akers, Escalante Home Health Care, 4/7	30.00	1	30.00
PT Treatment	12/22/14, Mary Akers, Escalante Home Health Care, 5/7	30.00	1	30.00
PT Discharge	1/23/15, Bryan Adams, LLC Home Health Care, 12/12	30.00	1	30.00
PT Evaluation	1/3/15, Samantha Jones, Universal HHC, 1/7	30.00	1	30.00

Total 180.00  
Amount Paid -0.00  
**Amount Due \$180.00 USD**

**Terms**  
Payable in 30-Days

**Notes**  
Thank you for your business!

This invoice was sent using **FirstBooks**

Invoice Autobiography

The above is what your invoice will look like on your screen. On the next page you will see what we at the Center for Physical Therapy Services, Inc. will receive for our records.





Jane Doe, RPT  
1234 Anywhere Street  
Some City CA 91111



Center for Physical Therapy Services, Inc.  
1650 E. Walnut Street  
Pasadena CA 91106-1619

Invoice # 0000001  
Invoice Date January 26, 2015  
**Amount Due \$180.00 USD**

Item	Description	Unit Cost	Quantity	Line Total
PT Evaluation	1/1/15, Max Smith, Allied Home Health Care, Inc., 1/10	30.00	1	30.00
PT Treatment	12/14/14, Mary Akins, Excellent Home Health Care, 3/7	30.00	1	30.00
PT Treatment	12/18/14, Mary Akins, Excellent Home Health Care, 4/7	30.00	1	30.00
PT Treatment	12/20/14, Mary Akins, Excellent Home Health Care, 5/7	30.00	1	30.00
PT Discharge	1/20/15, Bryan Adams, TLC Home Health Care, 12/12	30.00	1	30.00
PT Evaluation	1/3/15, Samantha Jones, Universal HHC, 1/7	30.00	1	30.00

**Total 180.00**  
Amount Paid -0.00  
**Amount Due \$180.00 USD**

**Terms**

Payable in 30-Days

**Notes**

Thank you for your business!

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# PAYMENT STUB

Jane Doe, RPT  
1234 Anywhere Street  
Some City CA 91111

### To View Your Invoice Online

Go to <https://janedoerpt.freshbooks.com/code> and enter the code F7kW3Yqhh93ZnDT

<b>Client</b>	Center for Physical Therapy Services, Inc.
<b>Invoice #</b>	0000001
<b>Invoice Date</b>	January 26, 2015
<b>Amount Due</b>	\$180.00 USD
<b>Amount Enclosed</b>	



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Your next step will be to update your profile on the right upper portion of your current screen. SAVE your changes and then log off.

When you log back on you will get a new screen along with your freshbooks URL. In our example it is: <https://janedoept.freshbooks.com/home>

This is what the new screen will look like:

Center4PT

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Home People Invoices Estimates Expenses Time Tracking Reports More

Overview Refer FreshBooks Pricing & Upgrade Buy Stamps

Overview + New

How to Create and Send Your First Invoice

Get Started!

- Create an Invoice
- Create a Client
- Create a Project & Track Time
- Connect Your Bank
- Get apps: iPhone, iPad, Android
- Build Your Team

show more

Outstanding Invoices USD

\$180.00

Total Outstanding (USD)

0 - 30 days old: \$180.00  
31 - 60 days old: \$0.00  
61 - 90 days old: \$0.00  
over 90 days old: \$0.00

Accounts Aging Report

Invoices & Expenses USD

\$200.00

\$100.00

\$0.00

Aug Sep Oct Nov Dec Jan

Invoices Paid Invoices

Expense Categories

This is where you will create a NEW INVOICE





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When creating a NEW INVOICE you will be asked to confirm you address and then make the following choice:

A screenshot of the Center4PT web application interface. At the top right, there are navigation links: "Add-on Store", "My Account", "Settings", "Help", and "Log out". The main content area is a white modal window titled "What do you bill your clients for?". Below the title is a subtitle: "This is a preference that you can change at any time in your Settings." There are three options, each with a blue circular icon and a radio button:

- Time**: Icon shows a hand holding a clock. Description: "Select this if you invoice at an hourly rate for your services." The radio button is unselected.
- Items**: Icon shows a printer with a document. Description: "Select this if you sell products or flat fee services." The radio button is selected.
- Both**: Icon shows a clock and a printer. Description: "Select this if you invoice for both time and items." The radio button is unselected.

At the bottom of the modal is a green button that says "Continue on to your invoice!". An arrow points from the text on the right to the "Items" option.

I chose the middle one and it took me to the invoice you will see below.





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This is what your invoice template for your second invoice will look like:

### New Invoice

Client \*

Invoice Number \*

Address 1650 E. Walnut Street  
Pasadena CA 91106-1619  
United States  
[Edit Address](#)

Date of Issue \*

PO Number

Discount

Accept Credit Cards

Item	Description	Unit Cost	Qty	Tax	Tax	Line Total
						0.00
						0.00
						0.00

Invoice Total	\$0.00
Paid to Date	0.00
<b>Balance (USD)</b>	<b>\$0.00</b>

Terms [\(Set Default Terms\)](#)

Notes Visible to Client

\*

Save this invoice as a draft. Your client will not be able to view this invoice until it is Email this invoice to your client. Send a hard copy of this invoice to your

The rest of the steps follows the same sequence as the first invoice steps. In the SETTINGS tab, you can change what your invoice has in it. Center for Physical Therapy Services, Inc. is NOT endorsing Freshbooks, but we think it is a viable alternative to having handwritten invoices. We also stress, that we are looking at using the free version of the software and not paying any money. This is the reason for us making this tutorial for our Therapists and our Social Workers.





Providers of PT, OT, ST, & MSW Services

## Try FreshBooks for Free

No credit card required. No contracts. Cancel anytime.

Our Plans <small>All prices in USD</small>	Free \$0 /month	Seedling \$19 <sup>95</sup> /month	Evergreen \$29 <sup>95</sup> /month	Mighty Oak \$39 <sup>95</sup> /month
# of clients you can manage	1	25	Unlimited	Unlimited
Additional staff who can access your account	n/a	n/a	1	5 <small>(\$10 each additional)</small>
Hide FreshBooks branding on emails to clients		✓	✓	✓
Automatic late fees on overdue invoices		✓	✓	✓
Expense tracking and automatic expense imports from bank accounts and credit cards		✓	✓	✓
Project Managers, Team Timesheets, Team Expense Reporting			✓	✓

### Plus all plans include the following:

- ✓ **FREE & Friendly** customer support Mon-Fri, 8am-8pm EST
- ✓ Control over your data: Easy import and export
- ✓ Rock solid [security safeguards](#) and [backup procedures](#) to protect your data
- ✓ Ability to accept credit cards online with no additional setup
- ✓ **Awesomeness** (also important)





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Pricing and Trial

## I thought FreshBooks had a free account – why am I on a trial?

You can use FreshBooks for free if you have one client and no staff in your FreshBooks account. However, during your trial you'll have unlimited access (no restrictions on clients or staff) to FreshBooks. We want you to have the opportunity to fully test out FreshBooks, to make sure that it's going to meet the needs of your business.

At the end of your trial, you'll be asked if you'd like to upgrade to one of our paid packages or stay on as a free member.



We hope that this invoicing system works for you and we ask that you give us feedback on your overall experience!

A handwritten signature in black ink that reads "Ralph Santos".

Ralph Santos, MBA, OTR/L

