Uploading data to 3rd party systems (csv export)

CareRight has a full range of standard reports that may be exported to a range of formats (Excel, CSV, HTML , PDF). This functionality provides data in formats to enable upload to 3rd party systems (for example: Accounting software, CRM, etc).

A base level of data is available (see list below) ready for use. You may build and export   your own reports from the available fields in CR to suit your needs. Any additional fields you require may be added (this may incur a cost).

- Date

- Invoice Number

- Transaction Class

- Receipt Number

- Adjustment Number

- Opening Balance number

- Transaction type

- Allocation

- Amount

- GST

- Description

- Item Number

- Account location

- Account provider

- Account Guarantor

CareRight users should consider how the 3 rd party system handles the file from CR as business process, data entry and configuration needs to mirror the desired outcome.

General Ledger Codes

CareRight records general ledger audit codes for items on invoices. Items can be configured to include set of codes prior to import to third party systems. This feature requires user training, configuration set up and time may be billable. Speak to a Clintel Consultant who will guide you through the process.