

# Create Invoices

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CST

When creating invoices, you have the choice of creating invoices manually for each billing cycle, or you can create recurring invoices that generate on a schedule you set. In this article, we discuss how to create invoices each billing period. For more information about working with recurring invoices, see [Create Recurring Invoices](#).


1. From the menu to the left, click **Accounting**.
2. Click **Income**.
3. Enter your Accounting PIN and click **Go**.

**Note:** If you do not have an Accounting PIN set, you are prompted to set one.

4. Click **Add Invoice**. The New Invoice page opens.

The screenshot shows the 'New Invoice' page in the KidKare system. The left sidebar contains a menu with options like Kids, Food Program, Claims, Expenses, eForms, EasyPay, Income, Accounts, Stripe Dashboard, Settings, Reports, Setup, Messages, Get Help, and Logout. The main content area is titled 'Invoice' and contains the following sections:

- Billing Details:** Invoice Date (09/29/2020), Terms (Due on Receipt), Due Date (09/29/2020), and Billing Period.
- Participant Care:** A table with columns: Participant, Rate, Rate Type, Qty, Fee, Discount, and Participant Total. It includes an 'Add Participant' button.
- Other Billable Items:** A table with columns: Description, Rate, Qty, Discount, and Item Total. It includes an 'Add Item' button.
- Payment & Notification Options:** A checkbox for 'Send Email Notification to Payers' and radio buttons for 'Cash/Check' and 'ePay'.
- Invoice Total:** A green bar showing the total amount as \$0.00.
- Recurring Invoice Settings:** A section with a 'Repeat' dropdown menu set to 'Never' and other options like 'Weekly', 'Every Other Week', '2x/Month', and 'Monthly'.

5. In the **Billing Details** section:
  - a. Click the **Invoice Date** box and select the invoice date from the calendar. This defaults to today's date.
  - b. Click the **Terms** drop-down menu and choose from the following:
    - Due on Receipt
    - Due in 7 Days
    - Due in 15 Days
    - Due in 30 Days
    - Custom
  - c. If you selected **Custom** in **Step 4b**, click the **Due** box and enter the number of days from the invoice date that this invoice is due. The **Due Date** field to the right updates automatically.
  - d. Click the **Billing Period** boxes and set the first and last day of the billing period for this invoice.
6. In the **Payment & Notification Options** section:
  - a. Click . The Payment Options dialog box opens.

**Payment Options**

How would you like to allow payers to pay for this invoice?

☒ Cash/Check

☒ stripe ePay Credit Card/Bank Transfer

Cancel Save

- b. Check the box next to each payment method to allow for this invoice.
  - c. Click **Save**. The Payment Options dialog box closes.
  - d. Check the **Send Email Notification to Payers** box to send an email to payers once this invoice is completed.
7. In the **Participant Care** section:
  - a. Click the **Participant** drop-down menu and select the participant to add to this invoice. If there is a default rate set on the participant's account, the Rate and Rate Type boxes populate automatically.
  - b. Click the **Rate** box and enter the base rate to charge for this participant.
  - c. Click the **Rate Type** drop-down menu and choose from the following:
    - Hour
    - Half Day
    - Day
    - Week
    - Two Weeks
    - Month
    - Attendance
  - d. Click the **Qty** box and enter the number of units charged. For example, if you selected **Day** in **Step 6c**, this would be the number of days for which you are charging.
  - e. Click the **Fee** box and enter any additional fees charged.
  - f. Click the **Discount** box and enter any discounts that apply. This can be a dollar amount or percentage. To change it, click the **\$** drop-down menu and select %.
  - g. Click the **Line Item Notes** box and enter any notes about the charges.
  - h. To add another participant to the invoice, click **Add Participant** and repeat **Steps 6a-6g**. Participants must be set up as siblings before you can add them to the same invoice.
8. In the **Other Billable Items** section:
  - a. Click **Description** box and enter a description of the billable item. For example, you may be charging for diapers.
  - b. Click the **Rate** box and enter the rate charged for this time.
  - c. Click the **Qty** box and enter the amount of this item to bill.
  - d. Click the **Discount** box and enter any discounts that apply. This can be a dollar amount or percentage. To change it, click the **\$** drop-down menu and select %.
  - e. Click **Add Item** and repeat **Steps 7a - 7d** for each billable item to add.

9. In the **Payers** section, check the box next to each payer who should receive this invoice.

The screenshot shows the 'New Invoice' form in the KidKare EasyPay system. The form is divided into several sections:

- Billing Details:** Includes fields for Invoice Date (09/29/2020), Terms (Due on Receipt), Due Date (09/29/2020), Billing Period (09/14/2020 to 09/28/2020), and Payment & Notification Options (Send Email Notification to Payers, Payment Options: Cash/Check, ePay).
- Participant Care:** A table with columns: Participant \*, Rate \*, Rate Type \*, Qty \*, Fee, Discount, and Participant Total. One entry is shown: Michael Young, \$50.00, Day, 10, \$0.00, \$0, \$500.00.
- Other Billable Items:** A table with columns: Description \*, Rate \*, Qty \*, Discount, and Item Total. One entry is shown: Diapers, \$2.50, 5, \$0, \$12.50.
- Invoice Total:** A green bar showing the total amount of \$512.50.
- Payers:** A section with a checkbox next to 'Young, James' and a dropdown menu for 'Pay' (100 %).
- Recurring Invoice Settings:** A section with a dropdown for '\* Repeat' (Never, Weekly, Every Other Week, 2x/Month, Monthly).

10. Click the **Note** box and enter any notes about this invoice. To show this note on the payer's copy, check the **Show on Payer Copy** box.

11. Choose from the following options:

- Click **Save as Draft** to save this invoice as a draft and return to working on it later.
- Click **Preview** to preview the invoice. If you checked the **Send Email Notification to Payers** box in **Step 6d**, you can customize the email the payer receives before sending the invoice.
- Click **Create Invoice** to create the invoice without previewing it. The invoice is created at Unpaid status and you are returned to the invoices list. If you checked the **Send Email Notification to Payers** box in **Step 6d**, the invoice is sent to the payer.