

Create Recurring Invoices

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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 recurring invoices. For more information about working with invoices, see [Create Invoices](#).

In this article:

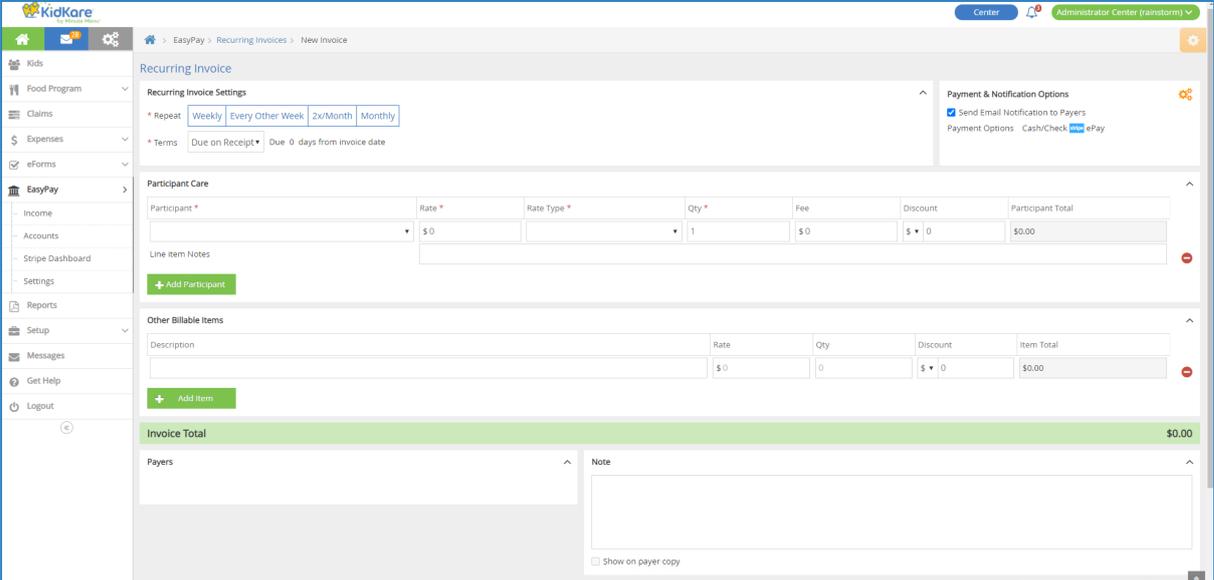
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Create Recurring Invoices

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  and select **Recurring Invoices**.
5. Click **Add Invoice**. The New Invoice page opens.



The screenshot displays the 'New Invoice' page in the KidKare system. The left sidebar contains navigation 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 'Recurring Invoice' and includes the following sections:

- Recurring Invoice Settings:** Features a 'Repeat' dropdown menu with options: Weekly, Every Other Week, 2x/Month, and Monthly. Below it is a 'Terms' dropdown menu with options: Due on Receipt and Due 0 days from invoice date.
- Payment & Notification Options:** Includes a checked checkbox for 'Send Email Notification to Payers' and a 'Payment Options' section with radio buttons for Cash/Check and ePay.
- Participant Care:** A table with columns: Participant, Rate, Rate Type, Qty, Fee, Discount, and Participant Total. It contains one row with a rate of \$0 and a total of \$0.00. A '+ Add Participant' button is below the table.
- Other Billable Items:** A table with columns: Description, Rate, Qty, Discount, and Item Total. It contains one row with a rate of \$0 and an item total of \$0.00. A '+ Add Item' button is below the table.
- Invoice Total:** A green bar showing a total of \$0.00.
- Payers and Note:** Two empty text input areas for adding payers and notes. A 'Show on payer copy' checkbox is at the bottom.

6. In the **Recurring Invoice Settings** section:
 - a. Select the repeat schedule for this invoice. You can choose from the following:
 - Weekly
 - Every Other Week
 - 2x/Month
 - Monthly
 - b. Click the **Repeat On** drop-down menu(s) and specify when this invoice should repeat. For example, if you selected Weekly in **Step 5a**, you would select the day on which to generate this invoice for the

week.

- c. Click the **First Invoice Billing Period** box and select the start date for the first recurring invoice's billing period. The end date populates according to your selection in **Step 5a**.
- d. 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
- e. If you selected **Custom** in **Step 5d**, 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.

The screenshot displays the 'Recurring Invoice' configuration screen in the KidKare system. It is divided into several functional areas: 'Recurring Invoice Settings' for scheduling (Weekly, Every Other Week, 2x/Month, Monthly), 'Participant Care' with a table for adding participants (Michael Young, \$200/week), 'Other Billable Items' for additional charges, and 'Payment & Notification Options' for payment methods and email alerts. The 'Invoice Total' is highlighted in green at \$200.00, and a 'Payers' list shows 'Young, James' with a \$100 payment.

7. In the **Payment & Notification Options** section:

- a. Click . The Payment Options dialog box opens.

The 'Payment Options' dialog box is shown, allowing the user to select payment methods. Both 'Cash/Check' and 'stripe ePay Credit Card/Bank Transfer' are selected with checkmarks. The 'Save' button is highlighted in green.

- 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.

8. 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.
9. 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 8a - 8d** for each billable item to add.
10. In the **Payers** section:
- a. Check the box next to each payer who should receive this invoice.
 - b. Click the **Pay** boxes and adjust the amount for which the selected payers are responsible.
11. 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.
12. Click **Create**. The invoice is created and the Recurring Invoices page opens again.

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Create Recurring Invoices from the Invoice Details Page

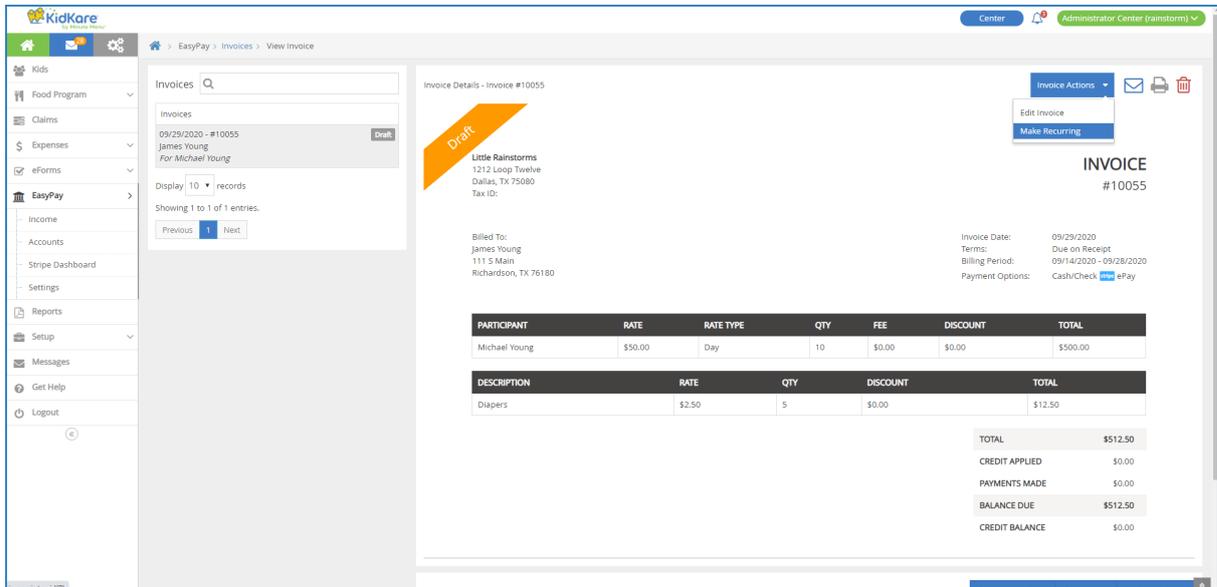
You can make past invoices recurring invoices from the Invoice Details page, if needed. This means you do not have to set up all invoice details—just the recurring invoice schedule.

1. From the menu to the left, click **Accounting**.

2. Select **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. Locate the invoice to make recurring.
5. Click the invoice to update. The Invoice Details page opens.
6. Click the **Invoice Actions** drop-down menu and select **Make Recurring**. The Edit Invoice page opens.



7. In the **Recurring Invoices** section:
 - a. Select the repeat schedule for this invoice. You can choose from the following:
 - Weekly
 - Every Other Week
 - 2x/Month
 - Monthly
 - b. Click the **Repeat On** drop-down menu(s) and specify when this invoice should repeat. For example, if you selected Weekly in **Step 9a**, you would select the day on which to generate this invoice for the week.
8. Review the invoice details and make changes, as needed.
9. Click **Create**.

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