

Customize Email Templates

Last Modified on 02/09/2023 9:14 am
CST

KidKare Accounting comes with several default email templates used when you email invoices to payers and designate guardians as payers. If you also use ePay, payers receive emails when payment is declined and when you make changes to recurring invoices. Personalize these emails to fit your business and branding needs. You can also enable and disable them.

In this article:

- [Edit Email Templates](#)
- [Enable & Disable Email Templates](#)

Edit Email Templates

Customize email templates to fit your business and branding needs.

1. From the menu to the left, click **Accounting**.
2. Click **Settings**. The Site Level Settings page opens.
3. Click the template to update. For example, to customize the invoice email template, you would click **Default Invoice Template**. The Email Template pop-up opens.
4. Click **Edit**.

Invoice Template

Subject *

Invoice InvoiceNumber from CenterName

From *

CenterName

Message *

Dear PayerName ,

Thank you for your business.

Please [click here](#) to view or print your invoice from CenterName .

If you are unable to view the invoice using the link above, please copy and paste this address into your browser.

LinkUrl

We look forward to doing more business with you.

Regards,

CenterName

Type @ to insert the tags

Email
CenterName
PayerName
InvoiceDate
InvoiceNumber
Participant
BillingPeriod
DueDate
Amount
Balance
LinkUrl
InvoiceNote

Attachments

Add Attachment

Cancel

Save

- Update the **Subject**, **From**, and **Message** boxes, as needed. Variables you can use to fill-in certain information are listed at the bottom of the editor (#Payerid, #Email, #id, and so on). To add one of these variables to your text, type @ and begin typing the variable to use. A list of available items displays as you type, so you can select the variable you need. For example, to populate the Subject with the recipient's invoice number, you would type @InvoiceNumber in the **Subject** box.

Invoice Template

Subject *

Invoice @I from CenterName

From *

Center

Message *

Dear PayerName ,

InvoiceDate

InvoiceNumber

InvoiceNote

- To add an attachment:

- a. Click **Add Attachment**.
- b. Click **Choose**.



File Type & Size Limits: You can attach the following file types: .JPG, .JPEG, .PNG, .DOC, .DOCX, .XLS, .XLSX, .PPT, .PPTX, and .PDF. The maximum file size for an individual file is 10MB, and the total size for all attachments is 25MB.

- c. Browse to the attachment on your computer, and click **Open**.
7. When finished, click **Save**.

[Return to Top](#)

Enable & Disable Email Templates

You can enable and disable email templates you do not wish to use. For example, if you do not plan on emailing invoices to parents, you could disable the Default Invoice Template.

1. From the menu to the left, click **Accounting**.
2. Click **Settings**. The Site Level Settings page opens. If an invoice is enabled, the slider is green. If the invoice is currently disabled, the slider is red.
3. Click  to enable the template.
4. Click  to disable the template.

Your changes are saved automatically on this page.

[Return to Top](#)