Create Invoices

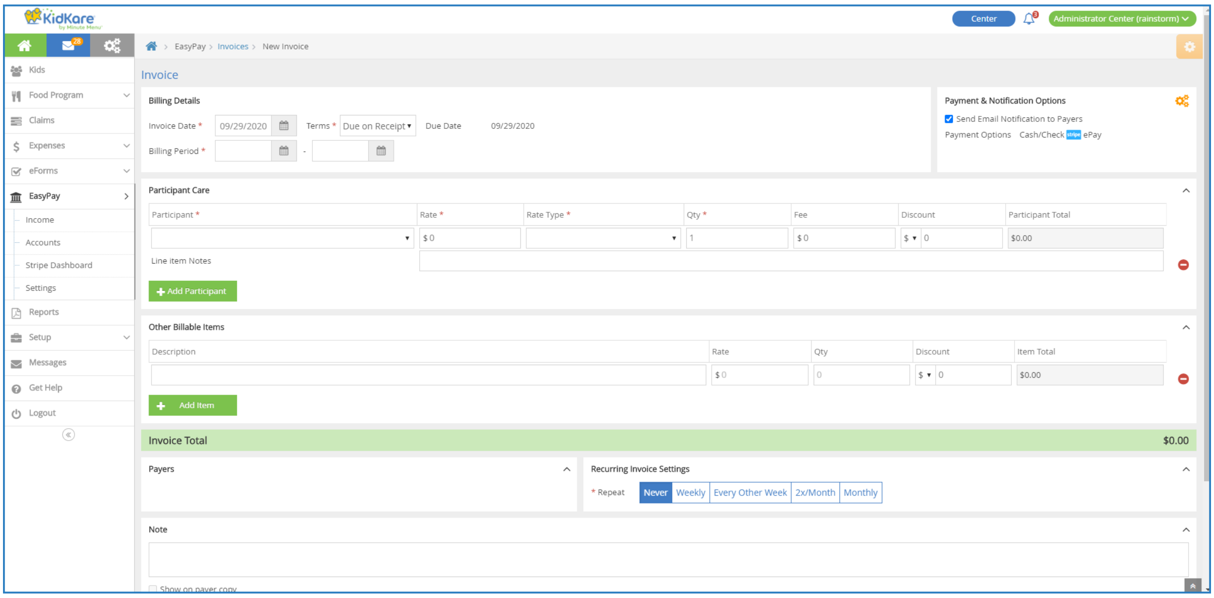
Last Modified on 02/09/2023 9:41 am CST

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**.

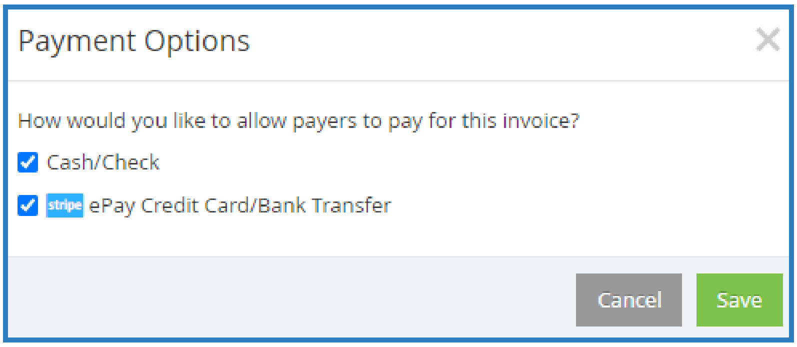
1. From the menu to the left, click **Accounting**.
2. Click **Income**.
3. Enter your Accounting PIN and click **Go**.

   > **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.



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.

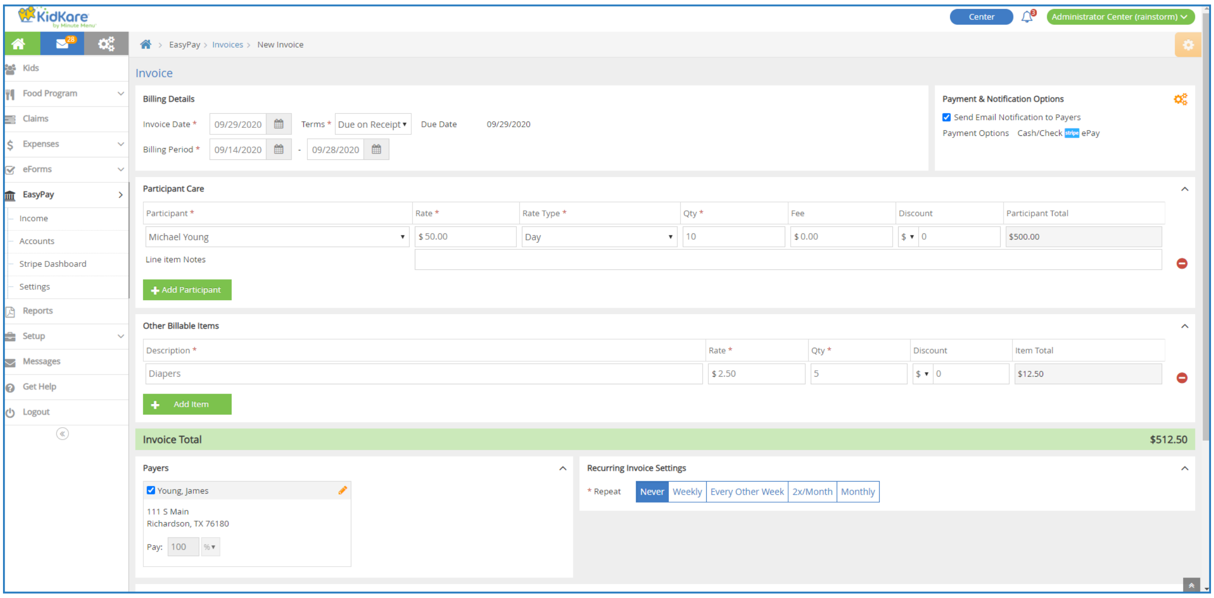


   b. Check the box next to each payment method to allow for this invoice.
   c. Click **Save**. The Payment Options dialog box closes.
   d. Check the **Send Email Notification to Payers** box to send an email to payers once this invoice is completed.

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.



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.