

# Customize Accounting Email Templates

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CST

KidKare Accounting for Homes and Centers both come 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 Accounting Email Templates](#)
- [Enable & Disable Accounting Email Templates](#)

## Edit Accounting 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.

## Invoice Template ✕

**Subject:** Invoice 10001 from Provider Name  
**To:** Payer Email  
**From:** Provider Name <noreply@kidkare.com>

Dear Smith, Ann,

Thank you for your business.

Please [click here](#) to view or print your invoice from Provider Name. For your convenience, you can also pay your invoice online with a credit card or bank account (ACH).

If you are unable to view the invoice using the link above, please copy and paste this address into your browser.  
%23%2Fprovider-accounting%2Fview-invoice-for-payer%2F

We look forward to doing more business with you.

Regards,  
Provider Name

**Attachments**

[Edit](#)

4. Click **Edit**.
5. 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 \*** Id from BilledFrom"/>

**From \***

**Message \***

Dear BilledTo ,

Thank you for your business.

Please [click here](#) to view or print your invoice from BilledFrom . For your convenience, you can also pay your invoice online with a credit card or bank account (ACH).

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,

**Type @ to insert the tags**

PayerId
Status
Email
BilledFrom
InvoiceDate
BilledTo
Id
ChildNames
BillingPeriod

DueDate
Amount
Balance
LinkUrl
InvoiceNote

**Attachments** Add Attachment

?
Cancel
Save

6. 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**.

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# Enable & Disable Accounting 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.

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