



Billing Guide

This guide will help you setup billing within KickBoss™. You must have completed the admin setup guide prior to billing your customers.

Basic Principles

KickBoss™ billing provides a high level of flexibility. Every studio is run differently and the Billing Section allows flexibility while basic accounting principles are followed.

Products are created for your classes and physical items you may be selling. Products can be associated with an account for reoccurring charges. Products can be added to an invoice and billed. Payments can be applied to a specific invoice. More details will follow in this Billing Guide.

Billing is based off Families. Bills are created for families making it easier to bill for multiple students from the same family.

Billing Dashboard

The billing dashboard provides you with a place to quickly view the financial performance of your studio. There are a series of charts here that show payments, charges, outstanding invoices etc.

Products

Products are the core of the billing application. They are “what” you are charging for. This can be a single class, punch cards, multiple class packages, studio wear, or anything else you are selling.

Adding Products

1. Under billing click {Products}
2. Click {add new product} link
3. The add product window will show
4. Give your product a name, description, price and tax rate
5. Tax rate should be the decimal version, so if you want to charge 5% it should 0.05.
6. Click {submit}

Editing Products

1. Under billing click {products}
2. Click {edit} on the row for the product you would like to edit.
3. Click {submit}

Removing Products

1. Under billing click {products}
2. Click {hide} on the row for the product you would like to hide.
3. You will notice that hidden products will still show in the products window this is to allow you to re-enable a product at a later time.
4. Once you click hide you will see that the check box in the column, visible, will become unchecked.

Invoices

Invoices are used to bill your customers and can be created at any time. These can be printed and sent to your customers. Invoices are also discussed in Families View, and Payments sections.

Adding Invoices

1. Under billing click { add invoice}
2. Select a Family
3. Enter or leave default for invoice date
4. Add items to invoice -2 Options-
 - a. If you have associated products with a family you can click {add family products} and those will be added to the invoice
 - b. If you would like to add other items or create an invoice for other items click {add item} and menu will come up allowing you to select a product and submit.
5. Once you have added your items to the invoice click {submit}.

Viewing Invoices

1. Under billing click {invoices}
2. The first list is open invoices which are invoices that have a balance
3. The second list is all invoices with the ability to filter.
4. To filter enter dates and click {filter}
5. From either of the lists you can open the invoice to see details to do this, click {open} on the row of the invoice you would like to view.

Printing Invoices

1. Under billing click {invoices}
2. From either List you can print an invoice.
3. Click {print} on the row you wish to print.
4. Printing can also happen from families' view which is discussed later.

Deleting Invoices

1. Under billing click {invoices}
2. From either list you can click delete an invoice.
3. Click {delete} on the row you wish to delete
4. A confirmation box will come up click {yes}.

Monthly Invoices

Monthly invoices are for reoccurring charges.

These charges are added under Family View / Current Family Products

The invoices can be created from the Billing / Monthly invoices screen.

Once you have setup family products these will show up in the Monthly invoices screen. You can key in a date under invoice date, select the families you wish to bill and click create invoices.

These invoices are then added to the invoices and receivables screen so you can print or email statements or single invoices.

Payments

Adding Payments

1. Under billing click {take payment}
2. {Select} the family
3. Enter date or leave default, amount, method, reference or check number
4. Click {submit}
5. On submit you will be taken to the apply payments screen and this payment will be open. See applying payments for more details.

Applying Payments

1. There are two ways to get to the apply payments screen. From Payments list and after entering a new payment.
2. Under billing click {payments}
3. The first list is for unapplied payments.
4. Click {apply} on the row you wish to apply.
5. The apply screen is shown with open invoices.
6. Enter the amount on the row you wish to apply the payment and click {apply}.
7. If you wish to apply to multiple claims repeat step 6.

Deleting Payments

1. Under billing click {payments}
2. From either list on this screen you can delete
3. Click {delete} on the row for the payment you wish to delete
4. A confirmation box will appear, click {yes} to continue.

5. If the payment was previously applied to an invoice this will be removed if a payment is deleted.

Print Receipt

1. Under billing click {payments}
2. From the all payments list click {print} on the row for the payment you wish to print.
3. After adding a payment, a box will appear asking if you would like to print a receipt at that time as well.

Families View

Families view is accessed by clicking families under {Menu} and then clicking {View} for the family you would like to work on. All of this section is within the page.

For this tutorial, we will be discussing the Billing Section of the Families view.

Under Billing in Family View you will see the family's balance.

You can print a statement by clicking {print statement} next to the balance.

Families view billing gives the ability to look at billing information for one family at a time instead of all families.

Open Invoices

Under open invoices you can View, Print, and Delete invoices for the families that have a balance.

Unapplied Payments

Under unapplied payments you can apply or delete a payment that has not yet been posted to an invoice.

All Invoices

From all invoices, you see past invoices for the family. You can view, print, and delete these invoices from this section.

All Payments

From all payments, you see past payments for a patient both posted and un-posted. You can delete a payment from this menu.

Current Family Products

Also See Monthly Invoices.

You can assign products to a family to create reoccurring invoices.