

KidKare Accounting Start-Up Checklist



Welcome to KidKare Accounting! Use this checklist to move through KidKare Accounting for the first time.

To access your account:

1. Go to app.kidkare.com.
2. Enter your login credentials.
3. Click **Login**.

Getting Started

Enroll participants and/or send enrollment invitations.

Enroll participants to create invoices for them. There are several ways to enroll:

- o **Add Participants Online:** Send enrollment invitations to guardians. For more information, see [Enroll New Participants with eForms](#) and [Work with eForms](#).
- o **Add Participants Manually:** Enter participant information manually. For more information, see [Enroll a Participant](#).

Designate Payers

Before you can create an invoice for a participant, you must designate at least one guardian as a payer of invoices.

For more information, see [Designate Payers for Invoices](#).

Create Guardian Accounts (Optional)

You can create guardian accounts so parents can log in to KidKare and view their invoices. However, guardians cannot pay invoices unless you also apply for and set up ePay.

For more information, see [Create KidKare Accounts for Guardians](#) and [Create and Verify an ePay Account](#).

Create Invoices

Create invoices on a daily, weekly, or monthly basis. You can also create recurring invoices. Guardians who use ePay and receive recurring invoices can approve automatic payments after they receive their first invoice.

For more information, see [Create an Invoice](#) and [Create a Recurring Invoice](#).

Record Invoice Payments

Once guardians pay their invoices, record the payments. You can apply partial payments, full payments, and even overpayment (this creates a credit on the parent's account). If guardians pay invoices with ePay, those invoices are automatically marked as paid.

For more information, see [Understand Invoice Statuses](#) and [Record Invoice Payments](#).

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Record Expenses

Record your business expenses in KidKare so you have a good record for tax deductions each year. Some expenses you can record in KidKare to claim on your taxes include activity expenses, advertising expenses, cleaning supplies, and so on.

For more information, see [Record Expenses](#).

View Reports

KidKare has a reporting feature that includes accounting reports, participant reports, meal reports, and so on. The Accounting reports include Actual Food Expenses, Form W-10, Statement of Account, and more!

For more information, see [Reports](#).

More Information

For more information about everything that KidKare Accounting has to offer, access the KidKare Knowledge Base at <https://help.kidkare.com/help>. You can also access this page at any time from KidKare. To do so, click **Get Help** from the menu to the left.