Create and Charge for Fees & Misc. Products

Laura Gibson - 2026-10-20 - Retail, Fees & Misc.

This guide walks you through how to create products, charge athletes, and use the **Add to Next Invoice** feature to keep billing organized and efficient.

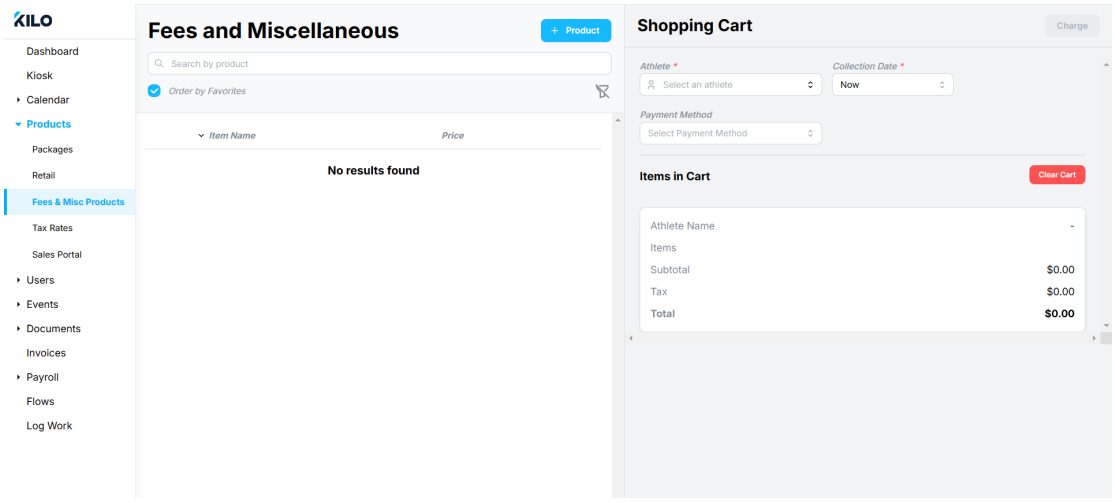
Step 1: Create Fees & Misc. Products

Before charging for any one-time item (like a fee or non-retail service), you'll need to create it in your system.

To create a product:

1. Go to **Products** in your Kilo menu
2. Select **Fees & Misc. Products**
3. Click **+ Product**
4. Enter:
    - Product name
    - Price
    - Tax rate (if applicable)
5. Click **Save**

Once saved, your product will be available to charge at any time.



Step 2: Add an Item to an Athlete’s Cart

When you're ready to bill:

1. Click on the product you want to charge
2. In the shopping cart:
    - Select the athlete
    - Choose how and when to collect payment

Step 3: Choose How to Collect Payment

You’ll have three options:

1. Collect Immediately

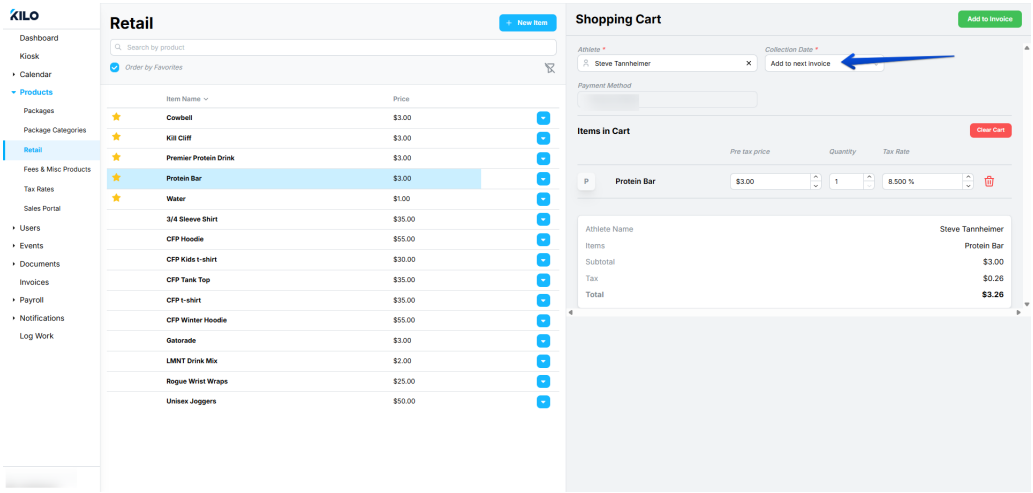
- Charges the athlete right away using the selected payment method

2. Schedule for a Specific Date

- Sets a future date for the charge to be processed

3. Add to Next Invoice (Recommended for simplicity)

- Attaches the item to the athlete’s upcoming invoice
- The charge will be collected automatically with their next billing cycle



Step 4: Apply the Charges

1. Depending on the charge method you've selected, the green button in the upper right of your screen will adjust in content.

2. No matter the charge method, click there to charge, schedule payment, or add to invoice.

Using “Add to Next Invoice”

When you select Add to Next Invoice:

- The item is automatically added to the athlete’s next invoice
- The invoice follows your existing billing plan schedule
- No extra steps are required

Why use this option:

- Keeps charges consolidated into one clean invoice
- Reduces the need for multiple transactions
- Makes billing more predictable for both staff and athletes

Edit or Remove Items (If Needed)

After an item has been added to an invoice:

1. Open the athlete’s invoice
2. Edit or delete the item directly
3. Changes will update the invoice total immediately

This gives you full flexibility to adjust pricing, quantities, or remove charges.

Understand Package Cancellation Restrictions

If an invoice includes items added via **Add to Next Invoice**, the system may block early cancellation of the related package.

This ensures all pending charges are properly handled before a package ends.

Resolve a Blocked Cancellation

If you need to cancel a package but are blocked:

1. Open the invoice tied to the package
2. Locate the Retail or Fees & Misc. items

3. Edit or delete those items
4. Return to the athlete’s package
5. Proceed with cancellation

Best Practices

- Use **Add to Next Invoice** for small add-ons or fees to reduce transaction clutter
- Use **Immediate Charge** for urgent or one-off payments
- Regularly review invoices to ensure accuracy before billing runs

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If you have further questions regarding fees, products, and billing in Kilo, please contact our Support team at hello@usekilo.com

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