

Billing & Services provides your clients online access to their invoices, services, tax exemptions, credits, orders and quotes.

Clicking **View Invoice** opens the *View Invoices* page. Based on the selected view criteria, either unpaid, paid or all invoice display. From this page, your clients can view any invoice and pay for a selected invoice online.

On this page:

On this page:

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Clicking **View Services** opens the *View Services* page. Based on the selected view criteria, either current, recurring, one time, or all services display. From this page, your clients can view the details of any service and authorize you to automatically charge them for a service.

View Tax Exemptions

Clicking **View Tax Exemption** displays the *View Tax Exemption* page. Based on the selected view criteria, either all, active, pending approval, or deactivated tax exemptions display. Your clients can add new and update existing tax exemptions.

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View Credits

Clicking **View Credits** opens the *View Credits* page. Based on the selected view criteria, either current or all credits display. Your clients can view the details of any credit issued to them.

ubersmith

Cogswell Cogs

1 open Order

0 closed Orders

34 outstanding Invoices

0 active services

Log Out

Home

→ Client Profile

View Profile

Payment Methods

Change Payment Method

View Credits

→ Billing & Services

View Services

View Service Details

View (All) Subscriptions

View Credits

View Credits

→ Reports

Credit Log

Add New Credit Log

Add New

→ Service Management

List Services

Add New Service

→ Support

View Tickets

Submit New Ticket

View Tickets

→ Service Manager

View New Jobs

View Services

View Profile

View Feedback

View ID Address

View Credits: Current Credits

View: Current Credits

Current Credits 1-7 of 7 shown

ID	Description	Type	Auto Apply	Payment Number	Date	Original Amount	Balance
24	Company Inland	Company Inland	New		Jan/20/2014	\$ 500.00	\$ 500.00
25	Company Inland	Company Inland	New		Feb/20/2014	\$ 1,000.00	\$ 1,000.00
26	Deposit for Colonization	Other	All	1001	Apr/18/2014	\$ 4,000.00	\$ 1,217.04
28	Visitation	Other	New	1046	Jan/21/2014	\$ 4,000.00	\$ 5,486.04
30	Deposit against all services	Checks	No	1054	May/01/2014	\$ 5,000.00	\$ 5,000.00
39	Credit from Service 20 description	Service Description	New		Jul/09/2016	\$ 4,800.00	\$ 94.90
49	Credit from Service 202 description	Service Description	New		Jul/09/2016	\$ 482.41	\$ 11.46

Current Credits 1-7 of 7 shown

View Orders

Clicking **View Orders** opens the *View Orders* page. From the *View Orders* page, your clients can select a specific order to view the details of that order and post a follow-up message to you about the order.

ubersmith		1 open Order 0 closed Orders	34 outstanding Invoices 0 active services	Log Out
Cogswell Cogs				
Home				
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View Credits				
View Credits				
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Credit Log				
Add New Credit Log				
Add New				
→ Service Management				
List Services				
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View Tickets				
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View New Jobs				
View Services				
View Profile				
View Feedback				
View ID Address				
View Orders				
Orders 1-10 of 10 shown				
Order ID #	Total	Order Date	Payment Activity	
6	\$ 1,182.75	4:45 PM on Nov/10/2013	2:20 PM on Apr/20/2014	05/11/2013 0:00
7	\$ 210.00	4:45 PM on Apr/11/2013	4:00 PM on Apr/20/2014	
9	\$ 107.00	6:08 PM on Apr/10/2013	3:11 PM on May/17/2013	
11	\$ 180.00	6:45 PM on Apr/16/2013	6:04 PM on Dec/17/2013	
12	\$ 236.50	4:31 PM on May/10/2013	5:58 PM on Dec/17/2013	
14	\$ 5,100.00	2:50 PM on May/20/2013	2:57 PM on May/20/2013	
15	\$ 5,100.00	4:00 PM on May/20/2013	4:24 PM on May/20/2013	
16	\$ 1,000.00	11:40 AM on Jun/20/2013	11:00 AM on Jul/16/2013	
17	\$ 182.75	9:30 PM on Jun/17/2013	10:16 AM on Jun/20/2013	
18	\$ 182.75	8:41 AM on Jun/20/2013	8:17 AM on Jun/20/2013	05/11/2013 0:00
Orders 1-10 of 10 shown				

View Quotes

Clicking **View Quotes** opens the *View Quotes* page. From the *View Quotes* page, your clients can select a specific quote to view the details of that quote and sign the contract to begin using the quoted service.

ubersmith

Cogswell Cogs

1 open Order

0 closed Orders

34 outstanding Invoices

0 active services

Log Out

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View Services

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View (All) Subscriptions

View Credits

View Credits

Reports

Credit Log

Add New Credit Log

Add New

Service Management

List Services

Add New Service

Support

View Tickets

Submit New Ticket

View Tickets

Service Manager

View New Jobs

View Services

View Profile

View Feedback

View ID Address

Quotes

Quotes 1-10 of 10 shown

ID	Name	Status	Updated	MM/YY	MM/YY	
110	Managed Service	Open	8 weeks ago	\$ 0.00	\$ 0.00	05/06/09 1:00
9	Provisioned Service Quote	Pending	1 month ago	\$ 385.00	\$ 40.00	05/06/09 1:00
12	Provisioned Service Quote	Expired	1 month ago	\$ 200.00	\$ 0.00	05/06/09
40	Basic Service	Expired	1 month ago	\$ 700.00	\$ 1,040.00	05/06/09
50	Basic Service	Expired	1 month ago	\$ 300.00	\$ 20.00	05/06/09
62	New Service	Expired	1 month ago	\$ 100.00	\$ 20.00	05/06/09
63	New Service Package	Expired	1 month ago	\$ 540.00	\$ 1,040.00	05/06/09
65	New Service	Expired	1 month ago	\$ 300.00	\$ 770.00	05/06/09
67	New Service	Expired	1 month ago	\$ 300.00	\$ 20.00	05/06/09
69	Managed Service (Quoted)	Expired	1 month ago	\$ 1,000.00	\$ 100.00	05/06/09

Quotes 1-10 of 10 shown

PayPal Subscriptions

Clicking **Create PayPal Subscriptions** opens the *Create PayPal Subscription* page. Your clients can select the period and the services available to be charged a fixed amount for a specific period. Once your client selects their desired period and services, clicking **Create Subscription** opens the PayPal site, where your clients can establish the subscription with PayPal.

The screenshot shows the ubersmith Frog Alley dashboard. The left sidebar contains navigation links: Client Profile, Payment Methods, Client Dashboard, View Contacts, Billing & Services, View Transactions, View Services, View Tax Exemptions, View Orders, View Profile, Virtual Subscriptions (highlighted with a red circle), Reports, Client Logs, Client Login Logs, Mail Log, Domain Management, Support, and Service Manager. The main content area is titled 'View Subscriptions: Active' and includes a 'CREATE NEW SUBSCRIPTION' button (highlighted with a red circle). Below this is a table of active subscriptions. A modal titled 'Create Paypal Subscription' is open, showing a table of services with checkboxes for selection. The modal also has a 'Create Subscription' button (highlighted with a red circle) and a 'Cancel' button.

Subscription ID	Status	Amount	Frequency	Paypal ID
13	Active	\$ 311.33	Monthly	Mastercard (Cancel)

Services	Period	Monthly
<input checked="" type="checkbox"/> 461	Virtual Hosting	\$ 202.43
<input checked="" type="checkbox"/> 462	Virtual Hosting	\$ 10.93
<input checked="" type="checkbox"/> 465	Virtual Hosting	\$ 97.97
<input checked="" type="checkbox"/> 467	Virtual Hosting	\$ 77.90
<input checked="" type="checkbox"/> 469	Virtual Hosting	\$ 46.93
<input checked="" type="checkbox"/> 471	Virtual Hosting	\$ 50.91

Related Topics

[Client Portal](#)