

Managing Billing and Services from the Client Portal

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

View Invoices

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.

Invoice Number	Date Sent	Date Due	Amount	Amount Outstanding	Dispute
1001-0001	Apr/15/2016	May/15/2016	\$ 1,000.00	\$ 996.21	View Invoice Pay Online
1001-0002	May/15/2016	May/22/2016	\$ 2,000.00	\$ 1,626.92	View Invoice Pay Online
1001-0003	May/15/2016	May/22/2016	\$ 10,000.00	\$ 10,000.00	View Invoice Pay Online
1001-0004	May/15/2016	May/22/2016	\$ 1,000.00	\$ 1,000.00	View Invoice Pay Online
1001-0005	May/15/2016	May/22/2016	\$ 1,000.00	\$ 1,000.00	View Invoice Pay Online
1001-0006	May/15/2016	May/22/2016	\$ 1,000.00	\$ 1,000.00	View Invoice Pay Online
1001-0007	May/15/2016	May/22/2016	\$ 1,000.00	\$ 1,000.00	View Invoice Pay Online
1001-0008	May/15/2016	May/22/2016	\$ 1,000.00	\$ 1,000.00	View Invoice Pay Online
1001-0009	May/15/2016	May/22/2016	\$ 1,000.00	\$ 1,000.00	View Invoice Pay Online
1001-0010	May/15/2016	May/22/2016	\$ 1,000.00	\$ 1,000.00	View Invoice Pay Online
1001-0011	May/15/2016	May/22/2016	\$ 1,000.00	\$ 1,000.00	View Invoice Pay Online
1001-0012	May/15/2016	May/22/2016	\$ 1,000.00	\$ 1,000.00	View Invoice Pay Online

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View Services

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.

ID	Service Description	Service Plan	Current Renewal Period	Cost
19	Managed Server	Managed Server	May/15/2016-Jun/15/2016	\$ 100.00
200	Half Cabinet (200)	Half Cabinet (200)	May/15/2016-Jun/15/2016	\$ 20.00
205	Colocation - Shared Rack	Colocation - Shared Rack	May/15/2016-Jun/15/2016	\$ 13.00

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.



You can control if tax exemptions are editable from the *Settings* page.

Tax Exemption ID	Status	Type	Certificate ID	PDF	Effective Date	Expiration Date
2	Active	Non-PPV	1234	-	Aug/15/2016	Aug/15/2017

[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.

[illegible][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.

[illegible][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.

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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, Billing & Services, Reports, and Domain Management. The main content area is titled 'View Subscriptions: Active' and displays a table of active PayPal subscriptions. A modal window titled 'Create Paypal Subscription' is open, showing a list of services and a 'Create Subscription' button. Red arrows and circles highlight the 'CREATE PAYPAL SUBSCRIPTION' link in the top navigation bar and the 'Create Subscription' button in the modal.

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

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