

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

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Service Manager

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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	20468	Jan/21/2015	\$ 4,000.00	\$ 5,486.04
30	Deposit against all services	Check	No	1004	Aug/01/2013	\$ 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.

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Cogswell Cogs

Log Out

1 open Order
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View ID Address

View Orders

Orders 1-10 of 10 shown

Order ID #	Total	Order Date	Payment Activity
6	\$ 1,182.75	4:45:29PM on Nov/10/2013	2:25:24PM on Apr/20/2014
7	\$ 213.00	4:45:29PM on Apr/11/2013	4:02:38PM on Apr/08/2014
9	\$ 107.00	6:08:29PM on Apr/16/2013	3:11:41PM on May/17/2013
11	\$ 188.00	6:43:02PM on Apr/16/2013	6:04:39PM on Dec/17/2013
12	\$ 236.50	4:31:22PM on May/10/2013	5:55:41PM on Dec/17/2013
14	\$ 5,100.00	2:05:29PM on May/06/2013	2:07:29PM on May/06/2013
15	\$ 5,100.00	4:02:39PM on May/06/2013	4:24:49PM on May/06/2013
16	\$ 1,000.00	11:40:16AM on Jun/05/2013	11:09:34AM on Jul/09/2013
17	\$ 182.75	9:30:19PM on Jun/11/2013	10:16:50AM on Jun/09/2013
18	\$ 182.75	8:41:38AM on Jun/09/2013	8:17:47PM on Jun/09/2013

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.

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Cogswell Cogs

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View Quotes

Quotes 1-10 of 10 shown

ID	Name	Status	Updated	QMTS	QMTS	
110	Managed Service	Open	8 weeks ago	\$ 0.00	\$ 0.00	0000-0000-1000
9	Provisioned Service Credits	Pending	1 month ago	\$ 385.00	\$ 40.00	0000-0000-1000
12	Provisioned Service Credits	Expired	1 month ago	\$ 200.00	\$ 0.00	0000-0000
40	Basic Service	Expired	1 month ago	\$ 700.00	\$ 1,040.00	0000-0000
50	Basic Service	Expired	1 month ago	\$ 301.00	\$ 20.00	0000-0000
62	New Service	Expired	1 month ago	\$ 1,100.00	\$ 20.00	0000-0000
63	New Service Package	Expired	1 month ago	\$ 540.00	\$ 1,040.00	0000-0000
65	New Service	Expired	1 month ago	\$ 300.00	\$ 770.00	0000-0000
67	New Service	Expired	1 month ago	\$ 300.00	\$ 20.00	0000-0000
69	Managed Service (Qualcomm)	Expired	1 month ago	\$ 1,000.00	\$ 100.00	0000-0000

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 Logs, 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. Red arrows point to the 'Services' column header 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"/> 466	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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