

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.

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

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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

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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 Calibration	Other	Alt	1001	Apr/18/2014	\$ 4,000.00	\$ 1,217.04
28	Voucher	Other	New	20468	Jan/21/2014	\$ 4,000.00	\$ 5,486.04
30	Deposit against all services	Credits	No	1004	May/01/2014	\$ 5,000.00	\$ 5,000.00
39	Credit from Service ID description	Service Description	New		Jul/09/2016	\$ 4,800.00	\$ 94.90
49	Credit from Service ID 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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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	2:20:24PM on Apr/02/2014
7	\$ 210.00	4:40:29PM on Apr/11/2013	4:00:28PM on Apr/08/2014
9	\$ 107.00	6:08:29PM on Apr/16/2013	3:11:41PM on May/17/2013
11	\$ 180.00	5:45:02PM on Apr/16/2013	6:04:29PM 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	2:00:29PM on May/06/2013	2:07:29PM on May/06/2013
15	\$ 5,100.00	4:00:29PM on May/06/2013	4:24:29PM on May/06/2013
16	\$ 1,000.00	11:40:16AM on Jun/03/2013	11:00:00AM on Jul/09/2013
17	\$ 182.75	9:30:29PM on Jun/17/2013	10:16:00AM on Jun/03/2013
18	\$ 182.75	8:41:00AM on Jun/03/2013	6:17:40PM on Jun/03/2013

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 1-40 of 40 shown

ID	Name	Status	Updated	QMTS	MM
110	Managed Service	Open	8 weeks ago	\$ 0.00	\$ 0.00
9	Preventative Service Details	Pending	1 month ago	\$ 385.00	\$ 40.00
12	Preventative Service Details	Expired	1 month ago	\$ 200.00	\$ 0.00
40	Basic Service	Expired	1 month ago	\$ 700.00	\$ 1,040.00
30	Basic Service	Expired	1 month ago	\$ 301.00	\$ 20.00
12	New Service	Expired	1 month ago	\$ 110.00	\$ 20.00
40	New Service Package	Expired	1 month ago	\$ 540.00	\$ 1,040.00
40	New Service	Expired	1 month ago	\$ 300.00	\$ 770.00
40	New Service	Expired	1 month ago	\$ 300.00	\$ 20.00
40	Managed Service (Qualcomm)	Expired	1 month ago	\$ 1,000.00	\$ 100.00

Quotes 1-40 of 40 shown

11/12/21 12:00

11/12/21 12:00

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 window titled 'Create Paypal Subscription' is open, showing a table of services with checkboxes for selection. The 'Period' dropdown is set to 'Monthly'. The 'Create Subscription' button at the bottom of the modal is also highlighted with a red circle.

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

[Client Portal](#)