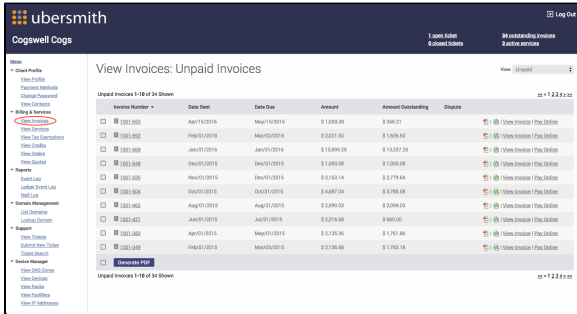


Managing Billing and Services from the Client Portal

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.



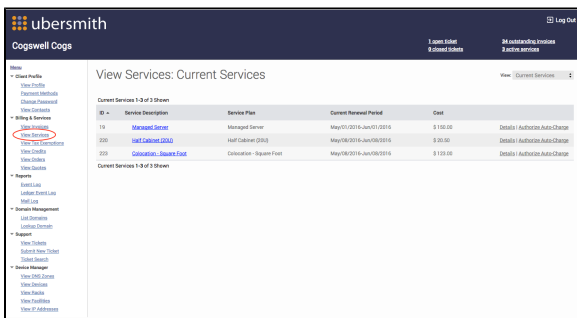
On this page:

On this page:

- [View Invoices](#)
- [View Services](#)
- [View Tax Exemptions](#)
- [View Credits](#)
- [View Orders](#)
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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.

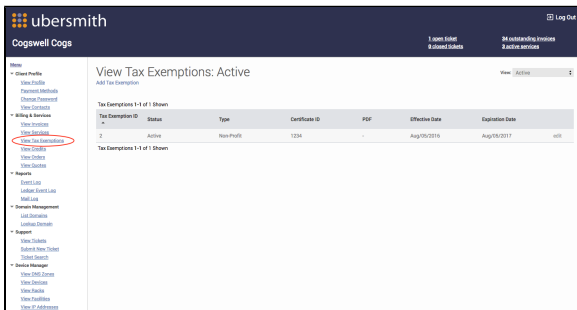


View Tax Exemptions

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.



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.

ID	Description	Type	Actx Apply	Payment Number	Date	Original Amount	Balance
24	Company issued	New			Jan/25/2014	\$ 800.00	\$ 800.00
25	Company issued	New			Feb/05/2014	\$ 1,000.00	\$ 1,000.00
26	Deposit for Education	Other	All	1001	Apr/18/2014	\$ 4,000.00	\$ 5,217.04
28	Vacation	Other	New	1048	Jan/01/2016	\$ 6,000.00	\$ 6,000.00
30	Deposit against all services	Check	No	1054	May/01/2016	\$ 6,000.00	\$ 6,000.00
39	Credit from Service ID description	Service Description	New		Jul/09/2016	\$ 4,800.00	\$ 94.90
40	Credit from Service ID description	Service Description	New		Jul/09/2016	\$ 482.45	\$ 11.46

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.

Order ID	Total	Order Date	Recent Activity
6	\$ 1,180.75	4:45 PM on Nov/10/2013	2:20:34PM on Apr/03/2013
7	\$ 213.00	4:02:28PM on Apr/11/2013	4:02:28PM on Jan/08/2014
9	\$ 107.00	6:08:28PM on Apr/16/2013	3:11:01PM on May/07/2013
11	\$ 180.00	3:43:52PM on Apr/16/2013	6:04:39PM on Jun/17/2013
12	\$ 236.00	4:31:22PM on May/10/2013	5:58:41PM on Jun/17/2013
14	\$ 1,100.00	2:55:37PM on May/20/2013	2:55:37PM on May/20/2013
15	\$ 4,100.00	4:02:28PM on May/20/2013	4:24:42PM on May/20/2013
16	\$ 1,800.00	11:02:16AM on Jun/05/2013	11:00:00AM on Jul/09/2013
17	\$ 180.75	3:30:19PM on Jun/11/2013	10:16:00AM on Jun/05/2013
18	\$ 382.75	8:41:38AM on Jun/05/2013	8:17:47PM on Jun/05/2016

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.

ID	Name	Status	Updated	MMS	NMS
110	Managed Service	Open	8 weeks ago	\$ 0.00	\$ 0.00
9	Managed Service Quote	Pending	1 month ago	\$ 385.00	\$ 40.00
17	Managed Service Quote	Expired	1 month ago	\$ 200.00	\$ 0.00
40	Managed Service	Expired	1 month ago	\$ 1,000.00	\$ 1,040.00
90	Managed Service	Expired	1 month ago	\$ 301.00	\$ 20.00
67	Managed Service	Expired	1 month ago	\$ 100.00	\$ 20.00
60	Managed Service Package	Expired	1 month ago	\$ 540.00	\$ 1,040.00
66	Managed Service	Expired	1 month ago	\$ 300.00	\$ 770.00
61	Managed Service	Expired	1 month ago	\$ 300.00	\$ 20.00
60	Managed Service (Duplicate)	Expired	1 month ago	\$ 1,000.00	\$ 1,040.00

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 interface. The main content area displays 'View Subscriptions: Active' with a 'CREATE PAYPAL SUBSCRIPTION' button circled in red. Below this is a table of active subscriptions. A modal window titled 'Create Paypal Subscription' is open, showing a list of services with checkboxes and a 'Create Subscription' button at the bottom right, also circled in red. The left sidebar contains navigation options, with 'Virtual Subscriptions' circled in red.

Subscription ID	Status	Amount	Frequency	Paypal ID
12	Active	\$ 311.33	Monthly	Mission (Cancel)

Services	Period	Monthly	Amount
<input checked="" type="checkbox"/> 461	Virtual Hosting		\$ 202.43
<input checked="" type="checkbox"/> 462	Virtual Hosting		\$ 10.03
<input checked="" type="checkbox"/> 466	Virtual Hosting		\$ 60.19
<input checked="" type="checkbox"/> 467	Virtual Hosting		\$ 77.90
<input checked="" type="checkbox"/> 469	Virtual Hosting		\$ 46.03
<input checked="" type="checkbox"/> 471	Virtual Hosting		\$ 50.00

Related Topics

[Client Portal](#)