
ModernBill v5.1 Operations Manual

All Articles in All Categories

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Products vs Packages

Question: What is the different between a product and a package?

Answer: A product is what you sell to your customers. Once your customers purchase a product from your website, it becomes a package or client package. The term "product" is not used once it has been added to a client's account unless you are modifying the product configuration settings.

README FIRST

README FIRST

The manual you are reviewing now is the "Operations Manual." Its sole purpose is to help you learn how to use all the features in your system. To get started, view the "Common Questions" section below.

[Common Questions](#)

You might want to view our list of common questions located in the following document:

<http://manual.modernbill.com/v5op/index.php?article=143>
Configurations Manual

If you need to learn how to configure any of your settings or modules in ModernBill, view the "Configurations Manual" located at:

<http://manual.modernbill.com/v5co/>
PDF Output

You have several options for PDF Output of the manual. Read your options below:

1. To PDF the entire manual, click on the "Main" category link. Then click on the "Export PDF" button in the "Other Options" section in the lower left-hand corner of the page.
2. To PDF a specific category, click on the category link. Then click on the "Export PDF" button in the "Other Options" section in the lower left-hand corner of the page.

Note: If you want to print all sub-categories in the "Control Panels" category, click on the "Control Panels" category link. This applies to any main category that contains sub-categories.

With your PDF Output you can save, print, email, and search the document based on your specific needs.

Can't Find The Information You Need?

This manual is consistently updated to reflect changes to the product. If you cannot find the information you need specific to configuring your ModernBill system, please create a helpdesk ticket at <http://www.modernsupport.com>.

Common Questions

Common Questions

Below is a list of common questions specific to using ModernBill. Each set of questions is categorized for you to find what you need quickly. Each question is linked to an article for further information.

New questions are being added daily so check back frequently.

Last updated: 10/18/2006

Dashboard

How do I use the dashboard?

Navigation

How do I learn about navigation basics?

What are bookmarks and how do I use them?

How do I manage bookmarks?

Clients

How do I add a client account to the system?

How do I cancel a client account?

How do I add a contact to the system?

How do I add a billing account to a client's account?

How do I edit a billing account associated with a client's account?

How do I remove a billing account associated with a client's account?

How do I adjust shared payments between billing accounts?

How can I learn more about the client details page?

How do I view/sort clients (live)?

How do I view/sort clients (archived)?

How do I add notes to a client's account?

How do I identify customers with a status of Pending?

How do I change a customer's status from Active to Inactive and vice versa?

Client Packages

How do I import or add historical and new packages to existing client accounts?

How do I cancel a customer's package?

How do I view/sort all packages?

How do I manually Suspend/Unsuspend or Enable a client package?

How do I upgrade a client's package?

How do I downgrade a client's package?

Client Groups

What are client groups?

How do I create a client group?

How do I create a client group attribute?

How do I manage client group attributes?

How do I assign a client to a client group?

Products

What is the different between a product and a package?

How do I create a Undefined Product?

How do I create a Hosting Product?

How do I create a Non-Hosting Product?

How do I create a Domain Registration Product?

How do I create a SSL Certificate Product?

How do I create a License Product?

How do I create a Software Product?

How do I create a Usage Product?

How do I create a Contract Product?

How do I create a Fee Product?

How do I create a product group?

Package Add-Ons

How do I add an add-on to a client's package?

Product Add-Ons

How do I create product Add-Ons?

Cycles (Billing Cycles)

How do I add a cycle (billing cycle)?

Discounts

How do I add a discount?

How do I add a discount group?

TLDs

How do I add a TLD?

How do I view a list of TLDs in the system?

How do I associate TLDs to the Domain Registration Product?

Pricing

How do I add pricing options?

Events

How do I run events?

How do I rerun events?

Invoices

How can I manage invoices?

How do I view client invoice history?

How do I print an invoice?

How do I create a single (one-off) invoice?

How do I manually generate invoices?

How do I remove invoices?

How do I void an invoice?

How do I apply a credit to an invoice?

How do I edit an invoice?

How do I issue a refund?

Invoice Payments

How do I apply a quick payment to an invoice?

How do I pay an invoice using a credit card?

How do I capture auth-only payments?

Miscellaneous Payments

How do I take a miscellaneous payment using the Virtual Terminal?

Payments

How do I generate and run the payment queue?

How do I set the payment queue run time?

How do I pay an invoice using a credit card?

How do I capture funds?

Email

How do I send an email to a customer?

How do I resend email?

How do I view a list of available email variables to use in email templates?

How do I manage email templates?

How do I reload the original email templates?

Coupons

How do I create a coupon?

How do I modify a coupon?

How do I remove a coupon?

How do I pre-apply a coupon to a product?

How do I apply a coupon to a product?

To-Dos

What are To-Do items and how do I use them?

Accounting

How do I view a "quick" overview of accounting?

How do I view the balance sheet report?

How do I view the profit and loss report?

How do I view the accounts receivable aging report?

How do I view the sales and receipts journal?
How do I view the purchases journal?
How do I view the general journal entries?
How do I view the general ledger?
How do I view the accounts receivable ledger?
How do I view the accounts payable ledger?
How do I view the tax payable ledger?
How do I view the chart of accounts?
How do I add a new ledger account?
Where can I learn about additional resources for accounting?
How do I view IPNs?
How do I add ledger entries to a product?
HelpDesk

How do I create a HelpDesk department?
How do I manage HelpDesk tickets?
How do I create and manage HelpDesk response templates?
How do I respond to HelpDesk tickets?

Dashboard

Using The Dashboard

The dashboard has several new features that are ideal for administration upon login. They include:

New Customers Panel - This shows the most recent new orders in descending order. (Oldest to newest.)

To-Dos Panel - This features shows the latest To-Do items. To learn more about To-Dos, view the Performing To-Do Items article.

New Customers Panel

New orders that require verification before being activated are shown in the New Customers panel. The New Customers panel contains several elements that help you quickly view and verify new orders. The list shows the following:

- Country
- Time order was placed
- Invoice amount and status (Due or Closed)
- Company Name
- Client Name
- Email Address

You have the option to review each order in detail by clicking on the "Review" link, which will open a new window with the Client Summary. Check the "Activate," "Cancel," or "Fraud" checkboxes and click on the Submit button to set the accounts to their respective status.

The "Set Cancel Action" has a drop down menu with the following options:

- suspend package if provisioned
- delete package if provisioned

The "Cancel Action" only applies to orders that have the "Cancel" or "Fraud" box checked.

Note: By default, new customers' packages that are not tied to a server group will become "Active" immediately. New customer's packages that are tied to a server group will be set to "Pending" status until the cron has run (if you have automation setup) or until you activate the new customer's packages from the Package Summary on the Client Summary page.

Additional Options:

Click on the "Show All New Customers" link to view all new customers orders:

Click on the "Refresh" link to refresh the New Customers list:

To-Dos Panel

The To-Dos panel lists non-provisioning orders and other tasks that require an admin or user's attention. The To-Dos panel is divided into the following sections:

- Due - immediate attention required

- 24 Hours - To-Do items that are to be due in the next 24 hours

Under each section you will find:

- My To-Do Items - To-Do items assigned to the user logging in will be shown in this section.

- Public - These items will be shown to anyone logging into the system. They could be messages about particular customers or a reminder for a meeting that you schedule.

Additional Options:

Click on the "Show All To-Dos" link to list out all the To-Dos for the user logged in to the system:

Click on the "Refresh" link to refresh the To-Dos section:

Navigation

There are no articles in this category.

Basics

Navigation Basics

ModernBill has several types of navigation in place to make it easy to move around your system and get to the information and features you need quickly. Let's start with the different types of navigation as defined below:

- Top Level Tabs
- Main Left Sub Nav
- Left Sub Nav
- Details Link Nav

Top Level Tabs

The Top Level Tabs include:

- Clients
- HelpDesk
- Finances
- Events
- Products
- Modules
- System

Main Left Sub Nav

The "Main Left Sub Nav" is a list of links available to you after you click on any of the "Top Level Tabs."

Left Sub Nav

The "Left Sub Nav" menu is a list of links available to you after you click on any of the "Main Left Sub Nav" links.

Details Link Nav

The "Details Link Nav" is a list of links inside any of the details pages for clients, products, finances, invoices, modules, etc. The "Details Link Nav" will appear throughout the system where navigation is necessary in order to complete a feature or function.

Bookmarks

Adding A Bookmark

Easily create bookmarks of any page inside the ModernBill system. This allows you to quickly visit those pages you view the most quickly. Follow the instructions below to learn how to create bookmarks.

1. Go to the page you want to bookmark within the ModernBill system.
2. In the upper left-hand corner of the page there is a line with "Bookmarks" shown. To the left of "Bookmarks" there is an "add" icon. Click on that icon to add the page you are on as a bookmark.
3. A pop-up text field will appear. Enter the name you want to use as a reference to the page you are setting as a bookmark. Then click on the "save" button.
4. When you reload the page you will see your bookmarks listed next to "Bookmarks" on every page. At any time you can click on your bookmark links. The page you chose will load accordingly.

Managing Bookmarks

If you have previously created bookmarks you can close or remove the bookmarks according to your own personal preference. Each user in the system can have their own set of bookmarks. If you need to learn how to create bookmarks, view the Adding a bookmark document.

1. Go to System/Admin Settings.
2. Click on the details icon for the user you want to manage bookmarks for in the Actions column.
3. When the page loads, you have two options:

Close a bookmark.
Delete a bookmark.

4. Find the bookmark you want to close or delete and click on the icons accordingly.

Clients

Adding New or Existing (Historical) Packages to Existing Client Accounts

ModernBill v5 supports the ability to add historical/new packages to existing client accounts. You can add as many packages as you need to any of your client accounts.

1. Go to Clients > Show Live Clients.
2. When the page loads, click on the "magnifying glass" icon in the Actions column, corresponding to the client you want to update.
3. You will see three links in the Package Summary section:

Create New Package - Represents new packages only.

Import Existing Package - Represents historical packages. For example, if you are moving from a previous billing system other than ModernBill, you can add those packages to your client's account.

Show All Packages - Displays all existing packages associated with this client's account.

Directions for adding each type are listed below:

Add New Package

1. Click on the "Create New Package" link.
2. A pop-up window will open. If you have more than one (1) order form available, it will list your order forms. Choose from the list. If you only have one (1) order form available, it will skip the selection list and go on to the "choose a product" list as described in Step 3 below.
3. Choose a product from the product list.
4. Choose a billing cycle.
5. Set the following:

Start Date: Select the month, day, year, hour and minute you want for the start date.

Domain: If applicable, select or enter the domain you want to assign to this package.

Billing Account: Select the billing account you want to use from the drop down menu.

Price: Enter the price you want to use for this package.

Server Groups: If a Server Group list is available, select the server group you want to assign to this package.

6. Click on the "add new package" button.

Import Existing Package

1. Click on the "Import Existing Package" link.
2. A pop-up window will open. If you have more than one (1) order form available, it will list your order forms. Choose from the list. If you only have one (1) order form available, it will skip the selection list and go on to the "choose a product" list as described in Step 3 below.

3. Choose a product from the product list.

4. Choose a billing cycle.

5. Set the following:

New Renewal Date: Select the month, day, year, hour and minute you want for the next renewal date.

Start Date: Select the month, day, year, hour and minute you want for the start date.

Domain: If applicable, select or enter the domain you want to assign to this package.

Billing Account: Select the billing account you want to use from the drop down menu.

Price: Enter the price you want to use for this package.

Server Groups: If a Server Group list is available, select the server group you want to assign to this package.

6. Click on the "import existing package" button.

Send An Email To A Customer

Easily send a customer a custom email.

1. Go to the client's details page specific to the client you want to send an email.

2. Click on the email address link next to "Email" in the "Primary Contact" section of the client details page.

3. By default, the client's email address will already be in the "Client Contacts To Send" list. If this is not correct, make the necessary changes accordingly.

4. Next, if this email requires a copy email, enter it in the "CC" field.

5. If this email requires an additional copy email (unseen by the recipient), enter it in the "BCC" field.

6. Enter a subject in the "Subject" field.

7. Enter your email message in the "Message Body" field.

8. Click on the "send" button.

Add A Contact

1. Find the client who's account you want to add a new contact.

2. Click on the "add new" button in the Primary Contact section on the client details page.

3. Set the following:

Contact

First Name: Enter the client's first name.

Last Name: Enter the client's last name.

Username: Enter the client's username.

Active: Do you want to activate the client's account. Check the "Active" box.

Password: Enter the client's password.

Confirm Password: Confirm the client's password by retying it.

Email: Enter the client's email address.

HTML. Email Format: Check the "HTML" box if you want the email for this client to be sent as

Company: Enter the contact's company name.

Street Address: Enter the client's street address.

Suite/Apartment: Enter the client's suite/apartment.

City: Enter the client's city.

State: Enter the client's state.

Zip: Enter the client's zipcode.

Country: Select the client's country.

Language: Select the language you want this client to use.

Primary Phone: Enter the client's primary phone number.

Secondary Phone: If applicable, enter the client's secondary phone number.

Fax: If applicable, enter the client's fax number.

Email Actions: Check on each email action you want this client to receive.

4. Click on the "add contact" button.

Add A Billing Account

1. Go to the client's account details page.

2. Click on the "show all" button in the "Billing Account Summary" section

3. When the page loads, find the contact you want to add a new billing account and click on the "add billing account" button.

Note: By default the primary contact has a billing account created. If you need to add new contacts and create billing accounts for the new contacts, read the Add A Contact document.

4. Select the type of billing account you want to add for this client.

Note: Depending on the type of billing account you choose will make available specific items in the Credit Card Account details.

5. Fill out the "Credit Card Account" details section according to the type of billing account you

chose in Step 4 above.

6. Click on the "add billing account" button.

View Client Invoice History

To view client invoice history, follow the instructions below.

1. Go to the client's account details page.

2. At the bottom of the page, in the center, there is a section that shows the last five invoices. To review all invoices for a client, click on the "View Invoice History" link. When the page loads you will see a list of all invoices related to this client.

Verifying Orders

To view and verify all new orders, follow the instructions below.

1. Click on the Clients tab.

2. Next, click on the "New Orders" link in the left sub nav menu.

3. When the page loads, you will see a list of all new orders including the following information:

- Order ID
- Country
- Timestamp of order
- Invoice ID
- Company Name (If Applicable)
- Customer Name
- Email Address

3. If you click on the down arrow next to the order id, it will expand the screen to show you more information on the order such as the Primary Contact, Client Details, and Last Note (If Applicable). You can also click on the "Display/Hide Additional Data" link at the top of the new orders list as it will expand each entry in the list accordingly.

4. Click on the "Review" link to see more information about a particular order. Once you have verified the order, check the "Activate" or "Cancel" checkbox and click the Submit button.

Note: If you choose the "Cancel" option, remember to select the appropriate cancellation function in the "Set Cancel Action" drop down menu at the bottom of the list prior to clicking the Submit button. Your choices include:

- suspend package if provisioned
- delete package if provisioned

Identifying Pending Customers

To identify pending clients, follow the instructions below.

1. Go to Clients.

2. Select "Pending" from the "Filter By: Status" drop down menu on the left sub nav.

3. Click on the "arrow" button.

When the page loads, you will see a list of pending clients.

Set A Customer Account To Active

-
1. Go to the client's account details page.
 2. When the page loads, click on the "Edit" link at the top of the client's account details page.
 3. Select "Active" from the Status drop down menu.
 4. Click on the "edit client" button.

Cancel A Customer Account

1. Go to the client's account details page.
2. When the page loads, click on the "Edit" link at the top of the client's account details page.
3. Select "Canceled" from the Status drop down menu.
4. Click on the "edit client" button.

Viewing The Customer Details Page

The client's account details page displays the following:

Client Information

- Account
- Manage Billing
- Primary Contact

Account Information

- Accounting Totals
- Billing Account Summary
- Last 5 Notes
- Last 5 Tickets
- Last 5 Invoices

Products and Services

- Package Summary
- Domain Summary
- SSL Certificate Summary

On this page you can do the following:

- Login to Client Area
- Send the primary contact an email.
- Show all contacts.
- Add new contacts.
- Edit primary contact.
- View Accounts Receivable
- Add Credit
- Show All billing accounts.
- Add new billing account to primary contact.

- View all invoices.
- View one of the last five invoices created for this customer.

- Show all packages.
- Import existing packages.
- Add new package.

- Show all domains for this customer.

- Show all SSL Certificates for this customer.

Understanding Client Types: Live/Archived

There are two types of client accounts in ModernBill - Live and Archived. A "Live" account is a client account that is active. An "Archived" client is a client account that is no longer active in the system. To view Live/Archived client accounts, follow the instructions below.

1. Click on the Clients tab.
2. To view "Live" accounts, click on the "Show Live Clients" link in the left sub nav. To view "Archived" accounts, click on the "Show Archived Clients" link in the left sub nav. Each link will show you a list of accounts that are "Live (Active)" or "Archived (Inactive)."

Clients

Editing A Billing Account

You can edit any billing accounts associated with a client's account. To learn how to edit a billing account, follow the instructions below.

1. Go to the client's account details page.
2. Click on the "Show All Billing Accounts" link in the "Billing Account Summary" section.
3. When the page loads, you will see a list of all billing accounts (if available) and their associated contacts.
4. Find the billing account you want to modify in the list. Then click on the "More" link or the drop down arrow next to the billing account ID in the Billing Account column.
5. Click on the "Edit" link in the Additional Actions list.
6. You can edit the following accordingly:

Billing Account - Select one of the following:

- Credit Card
- eCheck Account
- Bank Draft Account
- Manual Payment Account
- Third Party Gateway Account
- Wire Transfer Account

Credit Card Account - Edit the information ONLY IF "Credit Card" is selected above.
Bank Account - Edit the information ONLY IF "eCheck Account," "Bank Draft Account,"
and "Wire Transfer Account" are selected above.

Packages This Billing Account Pays For - Move all the packages you want to associate with this billing account by double-clicking the package name from the "Not Billable For" list to the "Billable For" list. You can also use the arrow keys at the bottom (make sure you click on the package(s) before you using the arrow keys).

Encryption Passphrase - Enter your encryption passphrase.

7. Click on the "update billing account" button.

Removing A Billing Account

You can remove any billing accounts associated with a client's account. To learn how to remove a billing account, follow the instructions below.

1. Go to the client's account details page.
2. Click on the "Show All Billing Accounts" link in the "Billing Account Summary" section.
3. When the page loads, you will see a list of all billing accounts (if available) and their associated contacts.
4. Find the billing account you want to modify in the list. Then click on the "More" link or the drop down arrow next to the billing account ID in the Billing Account column.
5. Click on the "Remove" link in the Additional Actions list.
6. A confirmation message will appear stating "Remove Billing Account."
7. Click on the "yes" button to remove the billing account.

Quick Stats

Viewing The Client Quick Stats Page

The "Quick Stats" page shows the number of clients in each of the following status categories:

- Active
- Pending
- Canceled
- Fraudulent
- Suspended
- Inactive
- Total

The page also shows a pie chart and a key representing each of the numbers and their specific categories.

Show New Clients

Show New Clients List

Clients >> Show New Clients

The "Show New Clients" list gives you a list of important information about new client accounts that have been inserted into the system. Follow the instructions below to learn more information about the "Show New Clients" list.

1. Click on the Clients tab.
2. Next, click on the "Show New Clients" link in the left sub nav menu.
3. When the page loads, you will see a list of all new clients including the following information:

- Order ID
- Country
- Timestamp of order
- Invoice ID
- Company Name (If Applicable)
- Customer Name
- Email Address

3. If you click on the down arrow next to the order id, it will expand the screen to show you more information on the order such as the Primary Contact, Client Details, and Last Note (If Applicable). You can also click on the "Display/Hide Additional Data" link at the top of the new orders list as it will expand each entry in the list accordingly. The information you will see should be the following:

- Primary Contact
- Client Details
- Last Note

4. Click on the "Review" link to see more information about a particular order. Once you have verified the order, check the "Activate" or "Cancel" checkbox and click the Submit button.

Note: If you choose the "Cancel" option, remember to select the appropriate cancellation function in the "Set Cancel Action" drop down menu at the bottom of the list prior to clicking the Submit button. Your choices include:

- suspend package if provisioned
- delete package if provisioned

Show Live Clients

Show Live Clients and Viewing/Sorting Customer Accounts

Clients >> Show Live Clients

The "Show Live Clients" list gives you a list of live client accounts that have been inserted into the system. Follow the instructions below to learn more information about the "Show Live Clients" list.

Viewing

1. Click on the Clients tab.
2. Click on the "Show Live Clients" link in the Clients left sub nav.
3. When the page loads, it will display a list of all live client accounts in the system. At the top of the list you will see the following:

Client ID (Click to view the client details page of that particular Client ID).
Company
Primary Contact
Email (Click to create and send an email to the client in reference).
Country
Status
Actions

Sorting

Note: Each "click on the xxxxx link" reference below is specific to the column header.

Sort By Links:

- To sort by client ID, click on the ID link. It will sort the clients numerically. (Ascending/Descending)
- To sort by Company name, click on the Company link. It will sort the companies alphabetically. (Ascending/Descending)
- To sort by Contact name, click on the Contact link. It will sort the contacts (clients) alphabetically. (Ascending/Descending)
- To sort by Email, click on the Email link. It will sort the emails alphabetically. (Ascending/Descending)

Note: You can click on the "magnifying glass" icon next to the ID, Company, Contact, and Email links to perform a "Search by: Keyword/ID" sort.

Sort By Filter:

- To sort by State, select the active/inactive filter you want to show in the State drop down menu. Then click on the arrow icon to the right.
- To sort by Status, select the status you want to show in the Status drop down menu. Then click on the arrow icon to the right.

Display

You can view more information about each client by clicking on the "Display/Hide Additional Data" link or by clicking on the down arrow next to each client ID. You can also click on the "View" link for any record in the Actions column.

Show Archived Clients

Show Archived Clients and Viewing/Sorting Customer Accounts

Clients >> Show Archived Clients

The "Show Archived Clients" list gives you a list of live client accounts that have been inserted into the system. Follow the instructions below to learn more information about the "Show Archived Clients" list.

Viewing

1. Click on the Clients tab.
2. Click on the "Show Archived Clients" link in the Clients left sub nav.

3. When the page loads, it will display a list of all live client accounts in the system. At the top of the list you will see the following:

Client ID (Click to view the client details page of that particular Client ID).
Company
Primary Contact
Email (Click to create and send an email to the client in reference).
Country
Status
Actions

Sorting

Note: Each "click on the xxxxx link" reference below is specific to the column header.

Sort By Links:

- To sort by client ID, click on the ID link. It will sort the clients numerically. (Ascending/Descending)
- To sort by Company name, click on the Company link. It will sort the companies alphabetically. (Ascending/Descending)
- To sort by Contact name, click on the Contact link. It will sort the contacts (clients) alphabetically. (Ascending/Descending)
- To sort by Email, click on the Email link. It will sort the emails alphabetically. (Ascending/Descending)

Note: You can click on the "magnifying glass" icon next to the ID, Company, Contact, and Email links to perform a "Search by: Keyword/ID" sort.

Sort By Filter:

- To sort by State, select the active/inactive filter you want to show in the State drop down menu. Then click on the arrow icon to the right.
- To sort by Status, select the status you want to show in the Status drop down menu. Then click on the arrow icon to the right.

Display

You can view more information about each client by clicking on the "Display/Hide Additional Data" link or by clicking on the down arrow next to each client ID. You can also click on the "View" link for any record in the Actions column.

Add New Client

Add New Client

Clients >> Add New Client

You can add clients manually or use the order form. This article shows you where and how to create clients manually in your ModernBill system.

1. Go to Clients/Add New Client.
2. Enter the following information:

Account

Username: Enter the client's username.

Password: Enter the client's password.

Confirm Password: Confirm the client's password by retyping it.

Active: Do you want to activate the client's account. Check the "Active" box.

Theme: Select the theme you want to use for this client's account. Currently the "Default" theme is the only theme available.

Personal

First Name: Enter the client's first name.

Last Name: Enter the client's last name.

Email: Enter the client's email address.

Language: Select the language you want this client to use.

Street Address: Enter the client's street address.

Suite/Apartment: Enter the client's suite/apartment.

City: Enter the client's city.

State: Enter the client's state.

Zip: Enter the client's zipcode.

Country: Select the client's country.

Primary Phone: Enter the client's primary phone number.

Secondary Phone: If applicable, enter the client's secondary phone number.

Fax: If applicable, enter the client's fax number.

Manage Billing

Monthly Billing Day: If you have configured your system to run in monthly billing mode, select the day you want this client to have invoices generated. This will be the first day of their billing cycle.

Company: If applicable, enter the client's company name.

Tax: Do taxes apply to this client's account? Check the "Apply" box.

Tax ID Number: If you checked the "Tax" box above, enter the tax ID number for this client.

3. Click on the "Add Client" button.

Tip: The information you create above is also used to create the Primary Contact.

Filter By: Status

Filter By: Status

Clients >> Filter By: Status

The "Filter By: Status" feature is designed to generate a list of clients based on the following:

- Show All (Default)
- Active
- Pending
- Canceled
- Fraudulent
- Suspended
- Inactive

Choose from the drop down menu available and click on the arrow box.

Client Details Page

Client Summary Page

Clients >> Filter By: Status >> Show All

There are a variety of ways to get to the Client Summary page. Typically by clicking on Client ID or Client Name will take you to the Client Summary page from any of the following "Left Main Sub Nav" links:

- Show New Clients
- Show Live Clients
- Show Archived Clients
- Add New Client
- Filter By: Status (Show All or any of the status options in the drop down menu.)

NOTE: For the purpose of this document, we are going to use the "Clients >> Filter By: Status >> Show All" path so you can get to all of your clients quickly and easily.

Once you are on the Client Summary page, you will see several summaries pertaining to the client's account. These summaries include:

- Primary Contact
- Client Details
- Attributes
- Accounting Totals
- Billing Account Summary
- Invoice Summary
- Administrative Actions
- Package Summary
- Domain Summary
- Last 5 Notes
- Last 5 Tickets
- Last 5 Email Correspondence
- Last 5 Packages
- Last 5 Invoices
- Primary Contact

 First Name: Client's first name.

 Last Name: Client's last name.

 Email: Client's email address. Click on the email address link to create and send the client an email.

 Contacts: There are two columns. By default, the client's account email address is in the "Client Contacts To Send" column. If you want to send the email to an additional contact, move the contact from the "Client Contacts Available" column on the right to the "Client Contacts To Send" column on the left by double-clicking the email address or use the arrows.

 CC: Enter the email address you want to copy the email.

 BCC: Enter the email address you want to blind carbon copy the email.

 Subject: Enter the subject of the email.

 Message Body: Enter the message in the message body.

Click on the "send" button.

 Company: Client's company name.

 Address 1: Client's address.

 Address 2: Client's address

 City: Client's city.

 State or Region: Client's state or region.

 Zip or Postal Code: Client's zip or postal code.

 Country: Client's country.

 Primary Phone: Client's primary phone number.

 Secondary Phone: Client's secondary phone number.

 Fax: Client's fax machine.

 Actions: Choose from one of the following:

Link: [Edit Primary Contact](#)

Contact Details

 Client Contact ID: Cannot be changed. Set as default.

 Contact Is Primary: Cannot be changed unless another contact is available.

 Contact Is Active: If the contact is Active, select Yes. If the contact is not Active, select No.

Contact Information

Company: Enter/Modify the contact's company name, if applicable.
First Name: Enter/Modify the contact's first name.
Last Name: Enter/Modify the contact's last name.
Email: Enter/Modify the contact's email address.
Street Address: Enter/Modify the contact's street address.
Suite/Apartment: Enter/Modify the contact's suite or apartment.
City: Enter/Modify the contact's city.
State: Enter/Modify the contact's state.
Zip: Enter/Modify the contact's zip code.
Country: Select the contact's country from the drop down menu.
Primary Phone: Enter/Modify the contact's primary phone number.
Secondary Phone: Enter/Modify the contact's secondary phone number.
Fax: Enter/Modify the contact's fax number.

Login Information

Username: Enter/Modify the contact's username.
New Password: Enter/Modify the contact's new password.

You also have the option to generate and resend the contact's password by clicking on the "Generate and Resend Password" link.

Confirm Password: Re-enter/Modify the contact's new password.

Email Preferences

Language: Select the contact's language from the drop down menu.
Email Format: Select from one of the options below:

HTML
Plain Text

Email Actions: Check all the email actions applicable to this contact.

Click on the "save" button.

Link: [Add New Contact](#)

Contact Details

Client Contact ID: Cannot be changed. Set as default.

Contact Is Primary: Cannot be changed unless another contact is available.

Contact Is Active: If the contact is Active, select Yes. If the contact is not Active, select No. _

Contact Information

Company: Enter/Modify the contact's company name, if applicable.

First Name: Enter/Modify the contact's first name.

Last Name: Enter/Modify the contact's last name.

Email: Enter/Modify the contact's email address.

Street Address: Enter/Modify the contact's street address.

Suite/Apartment: Enter/Modify the contact's suite or apartment.

City: Enter/Modify the contact's city.

State: Enter/Modify the contact's state.

Zip: Enter/Modify the contact's zip code.

Country: Select the contact's country from the drop down menu.

Primary Phone: Enter/Modify the contact's primary phone number.

Secondary Phone: Enter/Modify the contact's secondary phone number.

Fax: Enter/Modify the contact's fax number._

Login Information

Username: Enter/Modify the contact's username.

New Password: Enter/Modify the contact's new password.

You also have the option to generate and resend the contact's password by clicking on the "Generate and Resend Password" link.

Confirm Password: Re-enter/Modify the contact's new password.

Email Preferences

Language: Select the contact's language from the drop down menu.

Email Format: Select from one of the options below:

HTML

Plain Text

Email Actions: Check all the email actions applicable to this contact.

Click on the "save" button.

Link: [Show All Contacts](#)

All Contacts

When the page loads you can see a complete list of all contacts created under this client account. To add a new contact, click on the "add contact" button. You also have several options available on this screen. You can click on any of the items in the "Actions" column. Your choices include:

Details
Edit
Remove

Client Details

Is Archived: Yes/No
Current Status: Active, Pending, Canceled, Fraudulent, Suspended, Inactive
Language: The client's preferred language.

Billing Country: The client's billing country.
Tax: Is tax applied or not.
Default Billing Method: Unknown.
Client Group: What client group do they belong. To learn more about client groups, view the [Creating and Managing Client Groups](#) article.
Actions: Edit Details (Link to modify client details). When the page loads, you have the option to modify the following settings:

Client Details

Is Archived: Click on the "Edit" link. A new page appears requesting you select either Yes/No. If you want to archive this client, select Yes. If you want to leave this client account in "live" mode, select No. Then click on the "save" button.

Company Name: Modify the company name accordingly.

Default Theme: Select an available theme from the drop down menu.

Client Group: Select an available client group from the drop down menu.

Manage: Clicking on the "Manage" link will take you to a list of client groups. Client groups will only appear if client groups have been created. To learn more about client groups, view the [Add New Client Group](#) document.

Client Status

Current Status: Select the status of the client in the drop down menu.

Note: Only active clients can be billed.

Status Change Reason: Enter a reason for changing the status of the client.

Billing And Tax Settings

Monthly Billing Day: If you have configured your system to run in monthly billing mode, select the day you want this client to have invoices generated. This will be the first day of their billing cycle.

Billing Country: Enter/Modify the country where the billing account is located.

Default Billing Account: You can have an unlimited number of billing accounts in your system. Select the appropriate billing account from the drop down menu.

Is Taxable: If this client should be taxed, select Yes. If this client should not be taxed, select No.

Tax ID Number: If applicable, enter the Tax ID Number.

Click on the "save" button.

Attributes

"Attributes" allows you to set client attributes that identify special characteristics associated with this client.

Client Attributes

Preferred Customer: Choose Yes or No

Reseller: Choose Yes or No

Maximum Discount: Choose Yes or No

Minimum Discount: Choose Yes or No

Exempt From Suspension: Choose Yes or No

Accounting Totals

The "Accounting Tools" section shows you a snapshot of the following "Account" and "Balance" information:

- Accounts Receivable
- Authorized
- Credit
- Revenue
- Accounts Payable
- Cost of Goods Sold
- Refunds
- Expenses

Also available for the "Actions" item is the ability to add a credit to the client's account by clicking on the "Add Credit" link. A new window appears showing the following:

Credit Amount: Enter the amount to credit.

Currency: Select the currency to use for the credit.

Explanation: Enter a reason or details on the credit.

Apply to Account: Select an account to apply the credit.

Click on the "Add Credit" button.

Billing Account Summary

The "Billing Account Summary" shows you the number of billing accounts in the system for a specific client such as the following:

Credit Cards

The "Actions" items include:

Add New to Primary - Click on the "Add New to Primary" link. When the page loads you will see a list of available contacts.

Set the following:

Billing Account

Type: Select the type of billing account by clicking on one of the available radio buttons.

Credit Card Account

If the account is a credit card, set the following information:

Name On Card: Enter the name on the credit card.

Type: Select the type of credit card.

Card Number: Enter the credit card number.
Expiry Month: Enter the expiration month.
Expiry Year: Enter the expiration year.
Issue Number: Enter the CVV2.
Start Date: Enter the start date of the account.

Bank Account

If the account is a bank draft, set the following information:

Bank Name: Enter the name of the bank.
Bank State/Province: Enter the state or province the bank is located.
Type: Select the type of bank account (If the "Bank Draft" option is not checked for the "Billing Account" type, this option will not be available):

Checking
Savings
Checking (Business)
Savings (Business)

Routing Number: Enter the routing number for the bank account.
Account Number: Enter the bank account number.
License/ID Number: Enter the license/ID number.
License/ID State: Enter the license/ID state.
Date of Birth: Enter the date of birth of this bank account holder.

Click on the "save" button.

Show All Billing Accounts - Click on the "Show All Billing Accounts" link. When the page loads you will see a list of all billing accounts for this client account.

Invoice Summary

The "Last 5 Invoices" section shows the last five invoices that have been created for this client.

The "Actions" items include:

View All Invoices - Click on the "View All Invoices" link. When the page loads you will see a list of invoices (assuming invoices have been generated). The following details are shown:

Invoice Number: You can click on the "Invoice Number" to view more details for that particular invoice.

Amount: The amount entered for the invoice.

Entered: The date the invoice was created.

Due: The date payment is due for that invoice.

Client: You can click on the client's name link to go back to the client's details

page.

Status: The status of the invoice.

Actions: Click on the details link to view details. Click on the edit link to edit the details.

Generate Invoices - Click on the "Generate Invoices" link. When the page loads you will see the following options:

Client Options

Generate Invoices For Client: The client's name appears as a link. Click the client's name to return to the client details page.

Preview Mode: If you only want to view the invoices prior to them being emailed to the client, check this box.

Packages to Invoice: By default you should see a list of packages to generate invoices in the "Invoice" column. You can move packages between the "Invoice" and "Do Not Invoice" columns by double-clicking the package name or use the available arrows.

Package Options

Include all packages that renew on or before: The date you select will generate invoices up to that date. You can use the drop down menus or click on the "..." button to use the built-in calendar.

Walk packages forward: If a period of time has lapsed, you can generate invoices for that amount of time.

Domain Options

Include all domains that expire on or before: The date you select will include domains to generate invoices up to that date. You can use the drop down menus or click on the "..." button to use the built-in calendar.

Click on the "continue" button.

If you are satisfied with the preview of invoices, click on the "proceed with invoice generation" button.

Administrative Actions

Administrative Actions are a collection of actions that help you quickly manage a client's account. The current Administrative Actions include:

- Suspend Client
- Cancel Client
- Archive Client

Package Summary

The "Package Summary" shows the number of Active packages for the given client. Click on the "Active" link to see a list of all active packages available to this client.

The "Actions" items include:

Create New Package - Click on the "Create New Package" link. To learn more, read the Adding Historical/New Packages to Existing Client Accounts document.

Import Existing Package - Click on the "Import Existing Package" link. To learn more, read the Adding Historical/New Packages to Existing Client Accounts document.

Show All Packages - Click on the "Show All Packages" link. To learn more, read the Adding Historical/New Packages to Existing Client Accounts document.

Domain Summary

The "Domain Summary" shows the number of Active domains for the given client. Click on the "Active" link to see a list of all active packages available to this client.

Last 5 Notes

Waiting for notes to be generated.

Click on the "Read/Add Notes" next to Actions to read all available notes for this client or to create a new note for this client. To learn how to add a client note, read the Adding Client Notes document.

Last 5 Tickets

The "Last 5 Tickets" lists the last 5 HelpDesk tickets that the client has submitted.

Last 5 Email Correspondence

The "Last 5 Email Correspondence" shows a list of the last five emails sent to the client. Each of the entries shows the following information:

Invoice name and id: Click on the name and id to view the email.

Timestamp: Includes date and time the email was sent to the client.

Last 5 Packages

The "Last 5 Packages" lists the last 5 packages that the client has ordered.

Last 5 Invoices

The "Last 5 Invoices" lists the last 5 invoices that have been generated for the client.

Packages

Adding New or Existing (Historical) Packages to Existing Client Accounts

ModernBill v5 supports the ability to add historical/new packages to existing client accounts. You can add as many packages as you need to any of your client accounts.

1. Go to Clients > Show Live Clients.
2. When the page loads, click on the "magnifying glass" icon in the Actions column, corresponding to the client you want to update.
3. You will see three links in the Package Summary section:

Create New Package - Represents new packages only.

Import Existing Package - Represents historical packages. For example, if you are moving from a previous billing system other than ModernBill, you can add those packages to your client's account.

Show All Packages - Displays all existing packages associated with this client's account.

Directions for adding each type are listed below:

Add New Package

1. Click on the "Create New Package" link.
2. A pop-up window will open. If you have more than one (1) order form available, it will list your order forms. Choose from the list. If you only have one (1) order form available, it will skip the selection list and go on to the "choose a product" list as described in Step 3 below.
3. Choose a product from the product list.
4. Choose a billing cycle.
5. Set the following:
 - Start Date: Select the month, day, year, hour and minute you want for the start date.
 - Domain: If applicable, select or enter the domain you want to assign to this package.
 - Billing Account: Select the billing account you want to use from the drop down menu.
 - Price: Enter the price you want to use for this package.
 - Server Groups: If a Server Group list is available, select the server group you want to assign to this package.
6. Click on the "add new package" button.

Import Existing Package

1. Click on the "Import Existing Package" link.
2. A pop-up window will open. If you have more than one (1) order form available, it will list your order forms. Choose from the list. If you only have one (1) order form available, it will skip the selection list and go on to the "choose a product" list as described in Step 3 below.
3. Choose a product from the product list.
4. Choose a billing cycle.
5. Set the following:
 - New Renewal Date: Select the month, day, year, hour and minute you want for the next renewal date.
 - Start Date: Select the month, day, year, hour and minute you want for the start date.
 - Domain: If applicable, select or enter the domain you want to assign to this package.
 - Billing Account: Select the billing account you want to use from the drop down menu.
 - Price: Enter the price you want to use for this package.
 - Server Groups: If a Server Group list is available, select the server group you want to assign to this package.
6. Click on the "import existing package" button.

Packages - Change Active/Inactive Status

To change the status of a package from Active to Inactive or vice versa, follow the instructions below.

1. Go to Clients/Packages.
2. Click on the orange icon next to the "Filter By: Status" drop down menu in the Packages secondary navigation bucket. Filter by status "Show All" so all your packages appear. Or you can choose "Active" or "Inactive" from the drop down menu.
3. When the page loads, move your mouse cursor to the right of the status in the "Filter By: Active" specific to the package that needs to be set to the "Active" or "Inactive" status. Select

Yes to set the package to the "Active" status or select No set the package to "Inactive" status for the "Is Active" option.

4. Click on the "Edit" button.

Packages - Suspend/Unsuspend Client Package

To suspend or unsuspend a client package, follow the instructions below.

NOTICE! The client package MUST be tied to a control panel in order to suspend/unsuspend the package, otherwise the function to perform this action will not appear in the interface.

1. Go to the client's details page.

2. Click on the "show all" button in the "Package Summary" section.

3. When the package list appears, click on the "edit" icon for the package you want to suspend/unsuspend.

4. Next, click on the "pencil" icon in the Actions column. The column in reference is specifically located in the "Server Name" row.

5. A new window will appear. Select the Suspend/Unsuspend option from the "Status" drop down menu.

6. Click on the "Edit" button.

7. When the events queue runs, the package will be set to Suspend/Unsuspend on the server.

Adding Client Notes

Clients Details Page >> Read/Add Notes

1. Go to the client's account details page.

2. Click on the "Read/Add Notes" link in the center of the client's account details page.

3. When the page loads, enter your notes or message in the "Note message" textbox.

4. Click on the "add note" button.

Adding A Hosting Package

1. Go to the client's account details page.

2. When the page loads, click on the "add new" button in the Package Summary section.

3. A new window will appear. Select the hosting package you want to add to the client's account from the products list.

4. Select a billing cycle from the list.

5. Set the following:

Start Date: Set the start date for the package.

Domain: Select an available domain from the drop down menu or enter a domain manually.

Billing Account: Select a billing account.

Price: Enter a price for the hosting package based on the billing cycle you chose in Step 4 above.

Setup Price: If applicable, enter a setup price.
Server Groups: Select the server group you want to use for this package.
Invoice: If you want to generate the invoice immediately, check the "Generate Immediately" box.

6. Click on the "add new package" button.

Add An Add-On To A Package

1. Go to the client's account details page.

2. When the page loads, click on the "add new" button in the Package Summary section.

3. A new window will appear. Select the add-on package you want to add to the client's account from the products list.

4. Select a billing cycle from the list. (May or may not be applicable to your non-hosting item)

5. Set the following:

Start Date: Set the start date for the package.

Domain: Select an available domain from the drop down menu or enter a domain manually.

Billing Account: Select a billing account.

Price: Enter a price for the hosting package based on the billing cycle you chose in Step 4 above.

Setup Price: If applicable, enter a setup price.

Server Groups: If applicable, select a server group associated with the product.

Invoice: If you want to generate the invoice immediately, check the "Generate Immediately" box.

6. Click on the "add new package" button.

Adding A Non-Hosting Package

1. Go to the client's account details page.

2. When the page loads, click on the "add new" button in the Package Summary section.

3. A new window will appear. Select the non-hosting package you want to add to the client's account from the products list.

4. Select a billing cycle from the list. (May or may not be applicable to your non-hosting item)

5. Set the following:

Start Date: Set the start date for the package.

Domain: Select an available domain from the drop down menu or enter a domain manually.

Billing Account: Select a billing account.

Price: Enter a price for the hosting package based on the billing cycle you chose in Step 4 above.

Setup Price: If applicable, enter a setup price.

Server Groups: In most cases, there will not be a server group associated with a non-hosting item.

Invoice: If you want to generate the invoice immediately, check the "Generate Immediately" box.

6. Click on the "add new package" button.

Adding A Domain Package

1. Go to the client's account details page.
2. When the page loads, click on the "add new" button in the Package Summary section.
3. A new window will appear. Select the domain package you want to add to the client's account from the products list.

Note: The domain packages will be listed by TLD. Example: "Dot com domain registration."

4. Select a billing cycle from the list. Example: 1 Year, 2 Years, 3 Years, 4 Years
5. Set the following:

Start Date: Set the start date for the package.

Domain: Enter the domain you want to add to the package.

Register Domain: Set the date you want the domain to be registered.

Billing Account: Select a billing account.

- 4 above. Price: Enter a price for the hosting package based on the billing cycle you chose in Step

Invoice: If you want to generate the invoice immediately, check the "Generate Immediately" box.

6. Click on the "add new package" button.

Running Package Events

There are two ways you can run package events:

All At Once
Individually

Choose the way you prefer to run the package events and read the corresponding section below:

All At Once

1. Click on the Events tab in the main navigation.
2. Click on the "Run Events" link in the "Manage Events" left sub nav menu.

All the events will be running at the same time.

NOTICE! Running all events at the same time will process everything, not just package events.

Individually

1. Click on the Events tab in the main navigation.
2. Next, filter the package commands by clicking on the "Filter By: Destination" drop down menu and selecting the types of packages you want to process. Your choices will be:

Show All
Registrar
Panel

Make your selection and click on the orange arrow to the right.

3. When the page loads with the filtered records, click on the "View" link in the Actions column or the "down" arrow in the ID column for the command you want to run.

-
4. Click on the "Run" link in the "Additional Actions" section.

Canceling A Customer Package

If the package is tied to a server group, meaning the account is created on the server, follow the instructions in Method 1 below. If the package is not tied to a server group, skip down to Method 2.

Method 1 - Canceling a Package Tied to a Server Group

1. Go to the client's account details page.
2. Click on the "show all" button in the Package Summary section.
3. When the page loads, find the package you want to cancel.
4. Click on the "View" link in the Actions column.
5. When the "Additional Actions" items appear, click on the "Edit" link.
6. There is a section on the page called "Servers" that contains the following:

Server Name
Panel
Status
Actions

Click on the pencil icon in the "Actions" column.

7. A window will appear. Select "Canceled" from the drop down menu and click on the "Edit" button.

A system event will be created. The event will be run automatically if you have your system setup for automation. Otherwise, please view the Running Events document.

Method 2 - Canceling a Package NOT Tied to a Server Group

1. Go to the client's account details page.
2. Click on the "show all" button in the Package Summary section.
3. When the page loads, find the package you want to cancel.
4. Click on the "View" link in the Actions column.
5. When the "Additional Actions" items appear, click on the "Edit" link.
6. Select "Canceled" from the Status drop down menu.
7. Click on the "save" button.

Suspending A Customer Package

If the package is tied to a server group meaning the account is created on the server, follow the instructions in Section 1 below. If the package is not tied to a server group, skip down to Section 2.

Section 1

1. Go to the client's account details page.

-
2. Click on the "show all" button in the Package Summary section.
 3. When the page loads, find the package you want to cancel.
 4. Click on the "View" link in the Actions column.
 5. When the "Additional Actions" items appear, click on the "Edit" link.
 6. There is a section on the page called "Servers" that contains the following:

Server Name
Panel
Status
Actions

Click on the pencil icon in the Actions column.

7. A window will appear. Select "Suspended" from the drop down menu and click on the "Edit" button.

A system event will be created. The event will be run automatically if you have your system setup for automation. Otherwise, please view the Running Events document.

Section 2

1. Go to the client's account details page.
2. Click on the "show all" button in the Package Summary section.
3. When the page loads, find the package you want to cancel.
4. Click on the "View" link in the Actions column.
5. When the "Additional Actions" items appear, click on the "Edit" link.
6. Select "Suspended" from the Status drop down menu.
7. Click on the "save" button.

Activating A Customer Package

If the package is tied to a server group meaning the account is created on the server, follow the instructions in Section 1 below. If the package is not tied to a server group, skip down to Section 2.

Section 1

1. Go to the client's account details page.
2. Click on the "show all" button in the Package Summary section.
3. When the page loads, find the package you want to cancel.
4. Click on the "View" link in the Actions column.
5. When the "Additional Actions" items appear, click on the "Edit" link.
6. There is a section on the page called "Servers" that contains the following:

Server Name
Panel
Status
Actions

Click on the pencil icon in the Actions column.

7. A window will appear. Select "Active" from the drop down menu and click on the "Edit" button. A system event will be created. The event will be run automatically if you have your system setup for automation. Otherwise, please view the Running Events document.

Section 2

1. Go to the client's account details page.
2. Click on the "show all" button in the Package Summary section.
3. When the page loads, find the package you want to cancel.
4. Click on the "View" link in the Actions column.
5. When the "Additional Actions" items appear, click on the "Edit" link.
6. Select "Active" from the Status drop down menu.
7. Click on the "save" button.

Upgrading A Client Package

Before you can upgrade a client's package, make sure you have your products configured to upgrade. To learn how to set your product to be upgradeable, view the Upgrade/Downgrade section of the document for the product type you created. For example, if you created a Hosting Product, read the Upgrade/Downgrade section of the Hosting Product document.

1. Go to the client's details page who owns the package you want to upgrade.
2. Click on the "Show All Packages" link in the "Package Summary" section.
3. When the page loads, click on the "down" arrow next to the package ID or the "View" link in the Actions column for the package you want to modify.
4. When the "Additional Items" appear, click on the "Upgrade" link.
5. There are two sections in the upgrade process - Add-ons and Packages.

Add-Ons

If there are add-ons associated with the product, they will be listed and available to upgrade. The record will state "Adjust Addons Only." If this appears and you want to adjust add-ons, set the following accordingly by clicking on the "configure" button.

When should this upgrade take place: Choose one of the following:

- Upgrade now and apply proration.
- Upgrade now and do not apply proration.
- End of current cycle.

Provision to the Panel: Check the box if you want the add-on to provision to the control panel.

Generate invoice if appropriate: Check the box if you want an invoice generated.
Comments: Comments are added automatically, but you can modify according to your own specific needs.

Click on the "adjust addons" button if you are only adjusting add-ons.

Packages

The "Packages" section shows you the following:

Product: The product name will be displayed. This is the product you can upgrade the existing client package to assuming you have configured the product to be upgradeable.

Price: Set the price of the upgraded package if different than what is listed when the page loads.

Setup Price: Set the setup price of the upgraded package if different than what is listed when the page loads.

Coupon Price: Enter the coupon price for the package.

Coupon Cycles: Enter the number of coupon cycles for the package.

Click on the "configure" button to set the following:

When should this upgrade take place: Choose one of the following:

Upgrade now and apply proration.

Upgrade now and do not apply proration.

End of current cycle.

Provision to the Panel: Check the box if you want the add-on to provision to the control panel.

Generate invoice if appropriate: Check the box if you want an invoice generated.

Comments: Comments are added automatically, but you can modify according to your own specific needs.

When you are ready to upgrade the client's package, click on the "perform upgrade" button if you are ONLY upgrading the package.

Downgrading A Client Package

Before you can downgrade a client's package, make sure you have your products configured to downgrade. To learn how to set your product to be downgradeable, view the Upgrade/Downgrade section of the document for the product type you created. For example, if you created a Hosting Product, read the Upgrade/Downgrade section of the Hosting Product document.

1. Go to the client's details page who owns the package you want to downgrade.
2. Click on the "Show All Packages" link in the "Package Summary" section.
3. When the page loads, click on the "down" arrow next to the package ID or the "View" link in the Actions column for the package you want to modify.
4. When the "Additional Items" appear, click on the "Downgrade" link.
5. There are two sections in the downgrade process - Add-ons and Packages.

Add-Ons

If there are add-ons associated with the product, they will be listed and available to downgrade. The record will state "Adjust Addons Only." If this appears and you want to adjust add-ons, set the following accordingly by clicking on the "configure" button.

When should this upgrade take place: Choose one of the following:

Downgrade now and apply proration.

Downgrade now and do not apply proration.

End of current cycle.

Provision to the Panel: Check the box if you want the add-on to provision to the control panel.

Generate invoice if appropriate: Check the box if you want an invoice generated.

Comments: Comments are added automatically, but you can modify according to your own specific needs.

Click on the "adjust addons" button if you are only adjusting add-ons.

Packages

The "Packages" section shows you the following:

Product: The product name will be displayed. This is the product you can upgrade the existing client package to assuming you have configured the product to be downgradeable.
Price: Set the price of the downgraded package if different than what is listed when the page loads.
Setup Price: Set the setup price of the downgraded package if different than what is listed when the page loads.
Coupon Price: Enter the coupon price for the package.
Coupon Cycles: Enter the number of coupon cycles for the package.

Click on the "configure" button to set the following:

When should this downgrade take place: Choose one of the following:

Downgrade now and apply proration.
Downgrade now and do not apply proration.
End of current cycle.

Provision to the Panel: Check the box if you want the add-on to provision to the control panel.

Generate invoice if appropriate: Check the box if you want an invoice generated.
Comments: Comments are added automatically, but you can modify according to your own specific needs.

When you are ready to downgrade the client's package, click on the "perform downgrade" button if you are ONLY downgrading the package.

Adjust Shared Billing Accounts

1. Go to the client's account associated with the billing accounts you want to adjust for shared billing.
2. Click on the "Show All Packages" link in the "Package Summary" section.
3. Find the package you want to adjust shared billing from the list and click on the down arrow or the "View" link.
4. Click on the "Details" link in the "Additional Action Items" list.
5. When the page loads, scroll down to the "Payment Information" section.
6. There are two ways to adjust the percentages for each billing account:

Click on the slider in the "Shared Value" column while holding the mouse button down. The percentage will change accordingly in the textbox next to the slider. Adjust each billing account to your specific needs.
Enter the percentage value in the textbox next to the slider. Adjust each billing account to your specific needs.

7. Click on the "save" button.

Show All

Show All: Viewing/Sorting Packages

Viewing

1. Click on the Clients tab in the main navigation.
2. Click on the Packages link in the left sub nav.
3. When the Packages sub nav appears, click on the "Show All" link.
4. When the page loads, it will display all client packages regardless of their status in the system. At the top of the list you will see the following:

ID
Client
Package
Cycle
Status
Active
Actions

Sorting

Sort By Links:

- To sort by client ID, click on the ID link. It will sort the clients numerically. (Ascending/Descending)
- To sort by Client name, click on the Client link. It will sort the clients alphabetically. (Ascending/Descending)
- To sort by Package name, click on the Package link. It will sort the packages alphabetically. (Ascending/Descending)

Note: You can click on the "magnifying glass" icon next to the ID, Client, and Package links to perform a "Search by: Keyword/ID" sort.

Sort By Filter:

- To sort by Cycle, select the billing cycle you want to show in the Cycle drop down menu. Then click on the arrow icon to the right.
- To sort by Status, select the status you want to show in the Status drop down menu. Then click on the arrow icon to the right.
- To sort by All/Active/Inactive, select the type you want to show in the Active drop down menu. Then click on the arrow icon to the right.

Display

You can view more information about each package by clicking on the "Display/Hide Additional Data" link or by clicking on the down arrow next to each client ID. You can also click on the "View" link for any record in the Actions column.

Filter By: Status

Filter By: Status

Clients >> Filter By: Status

The "Filter By: Status" feature is designed to generate a list of packages based on the following:

- Show All (Default)
- Inactive
- Active

Choose from the drop down menu available and click on the arrow box.

Search By: Keyword/ID

Search By: Keyword/ID

Clients >> Packages >> Search By: Keyword/ID

Enter a keyword or ID and press the arrow button. The system will retrieve all records related to the keyword or ID you are searching.

Domains

There are no articles in this category.

Filter By: Status

Filter By: Status

Clients >> Domains >> Filter By: Status

The "Filter By: Status" feature is designed to generate a list of domains based on the following:

- Show All (Default)
- Inactive
- Active

Choose from the drop down menu available and click on the arrow box.

Search By: Keyword/ID

Search By: Keyword/ID

Clients >> Domains >> Search By: Keyword/ID

Enter a keyword or ID and press the arrow button. The system will retrieve all records related to the keyword or ID you are searching.

Client Groups

There are no articles in this category.

Add New Client Group

Add New Client Group

Clients >> Client Groups >> Add New Client Group

Client groups refer to a discount you can apply to all clients associated with the client group.

1. Click on the Clients tab.
2. Click on the "Client Groups" link in the left main sub nav.
3. Click on the "Add New Client Group" link in the left sub nav.
4. When the page loads, set the following:

Group Name: Enter the name of the client group you are creating.
Is Active: Click on the checkbox if you want the client group you are creating to be active.

5. Click on the "save" button.

6. Now you need to add a client group attribute. Read the Manage Group Attributes document to learn how to add attributes.

Show Client Groups

Show Client Groups

Clients >> Client Groups >> Show Client Groups

1. Click on the Clients tab.
2. Click on the "Client Groups" link in the left main sub nav.
3. Click on the "Show Client Groups" link in the left sub nav.
4. The "Show Client Groups" page shows the following information:

Group Attributes ID

Show All - Refers to the client group names.

Show All - Refers to the client attribute names.

Attribute Value - Refers to the value of the attribute you created.

Actions - Click on the "pencil" icon to edit the information or click on the "x" to remove the attribute.

Manage Group Attributes

Manage Group Attributes

Clients >> Client Groups >> Manage Group Attributes

The client group attributes allow for the following, also referred to as "attribute names":

Preferred Customer

Reseller

Minimum Discount

Maximum Discount

Exempt From Exemption

Each of the client groups refer to a discount you can apply to all clients associated with the client group.

If no client group attributes have been created, read the Add A New Group Attribute section below. If you have created a client group attribute and want to manage the attributes, view the Manage Group Attributes section below.

Manage Group Attributes

1. Click on the Clients tab.
2. Click on the "Client Groups" link in the left main sub nav.
3. Click on the "Manage Group Attributes" link in the left sub nav.
4. The "Manage Group Attributes" page shows the following information:

Group Attributes ID

Show All - Refers to the client group names.
Show All - Refers to the client attribute names.
Attribute Value - Refers to the value of the attribute you created.
Actions - Click on the "pencil" icon to edit the information or click on the "x" to remove the attribute.

Add A New Group Attribute

1. Click on the Clients tab.
2. Click on the "Client Groups" link in the left main sub nav.
3. Click on the "Manage Group Attributes" link in the left sub nav.
4. When the page loads, click on the "add new" link.
5. Set the following:

Attribute Group: Assuming you have created an attribute group by following the instructions in the Add New Client Group document, select your client group from the drop down menu.

Attribute Name: Select the "attribute name" from the drop down menu.

Attribute Value: Enter the attribute value discount. For example, if you want to apply a 10% discount, enter "10" in the textbox.

5. Click on the "add" button.

Finances

There are no articles in this category.

Accounting

There are no articles in this category.

Quick Stats

Quick Stats

Finances >> Accounting >> Quick Stats

1. Click on the Finances tab.
2. Click on the "Quick Stats" link in the left main sub nav.
3. When the page loads, the following will be available:

Today's Financial Statement

Currency
Revenue
Other Revenue
Cost of Goods
Expense
Other Expense
Net Income

Balance Sheet Summary

Currency
Assets
Liabilities
Equity
Current Equity
Liabilities & Equity

Reports

Reports

Finances >> Accounting >> Reports

1. Click on the Finances tab.
2. Click on the "Reports" link in the left main sub nav.
3. When the page loads, the following reports will be available:
Balance Sheet

The "Balance Sheet" report is a summary of your assets, liabilities, and equity account balance.

To generate a balance sheet through today, click on the "go" button. When the page loads it shows the balance sheet containing the following:

GL #
Description
Balances
Asset Accounts
Total Assets
Total Liabilities
Equity Accounts
Total Equity
Liabilities & Equity

Or you can select an earlier date by clicking on the "..." button.

Profit and Loss

The "Profit and Loss" report is a summary of your revenue, cogs, and expense account balance.

To generate a profit and loss sheet for the current month, click on the "go" button. When the page loads it shows the profit and loss sheet containing the following:

GL #
Description
Range Balance
YTD Balance
Revenue Accounts
Revenue Totals
Other Revenue Totals
Gross Profit
Cost of Goods Sold Totals
Expense Totals
Other Expense Totals
Net Profit

Or you can select a date range from the drop down menus, then click on the "generate report" button.

Accounts Receivable Aging Report

The "Accounts Receivable Aging Report" shows what is owed to you and how long it has been owed.

To generate an accounts receivable aging report, click on the "go" button. When the page loads it will show an accounts receivable aging report containing the following:

Client - Click on the client url and you will be redirected to the client's details page.
0-30 Days
30-60 Days
60-90 Days
90-120 Days
120+ Days

Daily Journals

Daily Journals

Finances >> Accounting >> Daily Journals

1. Click on the Finances tab.
2. Click on the "Daily Journals" link in the left main sub nav.
3. When the page loads, the following reports will be available:
Sales & Receipts Journal

The "Sales & Receipts Journal" report includes all daily sales and payments received and recorded in a combined sales and cash receipts journal.

Select a date by clicking on the "..." button. When the page loads it shows the sales & receipts journal containing the following:

Currency
Date
Invoice Number
Description
Cash Debit/Credit
Accounts Receivable Debit/Credit
Sales Debit/Credit

Tax Debit/Credit
Coupon Debit/Credit

Purchases Journal

NOTICE! The "Purchases Journal" is currently not being used or storing information.

The "Purchases Journal" report includes all daily cash disbursements that have been recorded in the purchases journal.

Select a date by clicking on the "..." button. When the page loads it shows the purchases journal containing the following:

Date
Invoice Number
Description
Debit
Totals

General Journal

General Journal

Finances >> Accounting >> General Journal

1. Click on the Finances tab.
2. Click on the "General Journal" link in the left main sub nav.
3. When the page loads, the following reports will be available:
General Journal Entries

The "General Journal Entries" report includes a list of all debits and credits in the system. Each record contains the following:

ID
Date
Description
Currency ID
Debits
Credits
Edit

General Ledgers

General Ledgers

Finances >> Accounting >> General Ledgers

1. Click on the Finances tab.

-
2. Click on the "General Ledgers" link in the left main sub nav.
 3. When the page loads, the following reports will be available:
General Ledger

The "General Ledger" report is a permanent summary of all supporting daily journals. Financial statements are generated from this ledger.

Select a date by clicking on the "..." button. When the page loads it shows the sales & receipts journal containing the following:

- Currency
- Date
- Invoice Number
- Description
- Ref.
- GL Number
- GL Account
- Debit/Credit

Accounts Receivable Ledger

The "Accounts Receivable Ledger" report is a special general ledger used only for posting accounts receivable journal entries. Monthly client statements are generated from this ledger.

Select a date by clicking on the "..." button. When the page loads it shows the purchases journal containing the following:

- Currency
- Date
- Invoice Number
- Description
- Ref.
- GL Number
- GL Account
- Debit/Credit

Accounts Payable Ledger

The "Accounts Payable Ledger" report is a special general ledger used only for posting accounts payable journal entries. Monthly statements for companies you owe are generated from this ledger

Select a date by clicking on the "..." button. When the page loads it shows the purchases journal containing the following:

- Date
- Invoice Number
- Description
- Ref.
- GL Number
- GL Account
- Debit/Credit

Tax Payable Ledger

The "Tax Payable Ledger" report is a special general ledger used only for posting tax payable journal entries. Annual statements for the taxes you owe are generated from this ledger.

Select a date by clicking on the "..." button. When the page loads it shows the purchases journal containing the following:

- Date
- Invoice Number

Description
Ref.
GL Number
GL Account
Debit/Credit

Chart of Accounts

Chart of Accounts

Finances >> Accounting >> Chart of Accounts

Viewing The Chart of Accounts Page

Add A Ledger Account

Resources

Viewing The Chart of Accounts Page

1. Click on the Finances tab.
2. Click on the "Accounting" link in the left main sub nav.
3. Click on the "Chart of Accounts" link in the left sub nav.
4. When the page loads, the following reports will be sections will be available:

Balance Sheet Accounts

Asset Accounts
Liability Accounts
Equity Accounts

Financial Statement Accounts

Revenue Accounts
Cost of Goods Sold Accounts
Expense Accounts

Add A New Ledger Account

1. Click on the Finances tab.
2. Click on the "Accounting" link in the left main sub nav.
3. Click on the "Chart of Accounts" link in the left sub nav.
4. When the page loads, click on the "Add Ledger Account" link.
5. Set the following:

Ledget Account Type: Select from the following:

Asset Accounts
Liability Accounts
Equity Accounts
Revenue Accounts
Cost of Goods Sold Accounts
Expense Accounts

Other Revenue Accounts
Other Expense Accounts

GL Number: Typically starts with a 2 and is generally five (5) digits.
Parent GL Account: Optional, but can be Taxes Payable. (Consult your Accountant for additional assistance)
Account Label: Enter any text name that represents the type of account you are creating. Ex. Kentucky Taxes Payable
Account Access Key: Optional. Not needed unless modifications are made to your ModernBill system.

6. Click on the "save ledger account details" button.
Resources

BusinessTown.com is a great resource for learning about accounting terms and information on how to use them properly. Below is a link we found specifically on accounting terms:

[Basic Terms and Concepts](#)

Invoicing

Generating Invoices - Manually

This article teaches you how to generate invoices manually.

NOTICE: You should review the Setting Up Invoicing document and modify your settings according to your specific needs. This should be done prior to generating invoices in your system.

1. First you must have products with a status of "Active" or "Suspended" and assigned to a client's account.
2. Go to Finances/Generate Invoices.
3. When the page loads, set the following for each section:

Client Options

Include all clients that are: Active and/or Suspended.

Package Options

Include all packages that are: Active and/or Suspended.
Include all packages that renew on or before: Select the date in the drop down menus or click on the "..." button to select a date from the built-in calendar.

Walk packages forward: If you have invoices that need to be generated for previous months for any of your client accounts, select Yes and all those invoices will be generated up to the current billing cycle.

Domain Options

Include all domains that are: Check the "Active" box if you want to generate invoices for domains that are currently have an active status.

Include all domains that expire on or before: Select the date in the drop down menus or click on the "..." button to select a date from the built-in calendar.

Generate Invoice Options

Schedule invoices to generate on or after: Select the date in the drop down menus or click on the "... " button to select a date from the built-in calendar.

4. Click on the "continue" button.

5. Next, click on the Events tab.

6. When the page loads you will see a list of system queue events specific to the invoices that will be generated. At this point you have two options. You can process all the events at one time by clicking on the "Run Events" link in the Manage Events secondary navigation menu or you can click on the "clock" icon in the Actions column for any of the invoice entries you want to run. Make your selection and proceed forward with generating your invoice(s).

Viewing and Managing Invoices

To view invoices for your client accounts, follow the instructions below.

1. Click on the Finances tab.

2. When the page loads, you will be presented with a Quick Stats display, which categorizes your invoices by status (Due, Closed, Void, Bad Debt, Refunded, Has Declined Charges, Has Errored Charges, Credit Note, and Total) and lists how many invoices fall into each category. Click on the link below the category you wish to explore, or click on the link below "Total" to view the full list of invoices.

3. You are now presented with a summary of all your invoices, comprising the Invoice Amount, Amount Paid, Amount Due, Date Entered, Date Due, Client (Company and Client Name), Status, and Actions (Details and Print). Click on the invoice id in the Invoice No. column. (You can also access an invoice by clicking the "magnifying glass" icon in the Actions column.) The invoice details will appear on the next page.

4. Above the invoice are several Quick Links:

 Edit - Change the due date, add invoice comments, and change invoice status

 Take Credit Card Payment - Process a single credit card payment through your payment gateway

 Quick Manual Payment - Apply a manual payment (credit card, check, bank draft, wire transfer, or third party gateway) to the entire invoice or selected line items

 Create an Invoice Reversal - Create a credit note for this invoice and void it (also cancels any Auth Only transactions that have not been captured)

 Apply Credit/No Credit Available - If credit is available, allows you to apply credit to the entire invoice or selected line items

 Print - A new window will open with a printable version of the invoice

 Resend - Resends the invoice to the customer (this will not ask for a confirmation before sending)

 Resend with Comments - Allows you to edit and preview the invoice before resending

5. At the top of the invoice, the "To:" (client) and "From:" (your company) addresses are listed.

6. The invoice itself contains the following summary:

Invoice Number
Date Entered
Date Due
Status
Sub Total
Tax Total
Invoice Total
Amount Paid
Amount Due

7. Below this is the line item breakdown:

Package ID
Description - Product and domain
Begin - Date the package began

Current - Date the current (latest) renewal occurred

Next - Date the next renewal will occur

Quantity

Price
Discount - Discount amount (if any) and mathematical basis for arriving at the discounted amount

Setup - Setup fee (if any)

Sub Total - Total before tax

Tax - Tax amount (if any)

Totals - Package total, including any discounts, setup fees, and tax

Action
Line item description for additional add-ons

8. If tax zones are setup, they will appear below the line items.

9. The bottom of the invoice page lists any transactions that have taken place involving this invoice. The information displayed includes:

ID
Method - Type of payment transaction

Status - Status of payment transaction

Code - Code returned by the gateway

Notes - Comments associated with the transaction

Date - Date of the transaction

Gateway - Payment gateway associated with the transaction

Amount - Amount used in the transaction

Refunded Amount - Amount refunded, if applicable

Action:

Delete - Permanently remove this transaction from the database and delete all accounting data for it. The invoice it applies to will also be marked as due again.
Cancel - Cancel this transaction - you will be unable to capture these funds without running another transaction

Capture - Capture the funds of this transaction
Refund - Refund the transaction

Editing Invoices

There are several ways to get to the "edit" screen for any invoice in your system. The easiest way to edit invoices for your client accounts is to follow the instructions below.

1. Click on the Finances tab.
2. When the page loads, click on the "edit" icon in the Actions column.
3. When the page loads, set the following according to your specific needs:

Invoice Due Date: Select the date you want to use for the Due Date in the drop down menus or click on the "..." button to set the date using the built-in calendar.

Invoice Comments: Enter any comments you have in the textbox provided.

Invoice Status: Select the status of the invoice from the drop down menu. Your choices are:

- Due
- Closed
- Void
- Bad Debt
- Refunded
- Has Declined Charges
- Has Errored Charges

4. Click on the "save" button.

Removing Invoices

We highly recommend you do not delete invoices. Instead, apply a credit note to the invoice you want to "delete" in order to keep your system's accounting data correct.

To get started, follow the Invoices - Voiding article.

Invoices - Applying Payments Manually

Follow the instructions below to learn how to apply payments to any invoice manually.

1. Click on the Finances tab.
2. When the page loads, click the link in the "Due" column and locate the invoice to which you want to apply payment manually.
3. When the page loads, click on the corresponding invoice ID in the Invoice No. column. The invoice details will appear below the record of the invoice you are viewing. The other option is to click on the "magnifying glass" icon in the Actions column to view the invoice details.
4. Click on the "Quick Manual Payment" link in the "Quick Links" section of the page.
5. Set the following:

Choose Billing Account: Select the billing account you want to use for this payment in the drop down menu.

Payment Method: Select the payment method you want to use for this payment in the

drop down menu.

Check Number: If payment is being made by check, enter the check number.

Apply Payment To: Select "Entire Invoice" or "Selected Line Items." If you choose the "Selected Line Items" option, it will list the line items available for this invoice. Choose accordingly.

Amount of Payment: Enter the payment amount that you are applying to this invoice.

Payment Comments: Enter comments according to your specific needs.

6. Click on the "Apply Payment" button.

Invoices - Applying Credits

Follow the instructions below to learn how to apply credits to any invoice manually.

NOTICE: A credit is not a payment. A credit is used when discounting an invoice price.

1. Click on the Finances tab.

2. When the page loads, click on the "edit" icon in the Actions column.

3. When the page loads, click on the invoice id in the Invoice Number column. The invoice details will appear below the record of the invoice you are viewing. The other option is to click on the "magnifying glass" icon in the Actions column to view the invoice details.

4. Click on the "Apply Credit" in the "Quick Links" section of the page.

5. Set the following:

Apply Credit To: Select "Entire Invoice" or "Selected Line Items." If you choose the "Selected Line Items" option, it will list the line items available for this invoice. Choose accordingly.

Amount of Payment: Enter the payment amount that you are applying to this invoice.

Credit Comments: Enter comments according to your specific needs.

6. Click on the "Apply Credit" button.

Invoices - Voiding

Follow the instructions below to learn how to VOID any invoice manually.

1. Click on the Finances tab.

2. When the page loads, click on the "edit" icon in the Actions column.

3. When the page loads, click on the invoice id in the Invoice Number column. The invoice details will appear below the record of the invoice you are viewing. The other option is to click on the "magnifying glass" icon in the Actions column to view the invoice details.

4. Click on the "Create Credit Note" in the "Quick Links" section of the page.

5. Click on the "yes, create a credit note and void this invoice" button.

6. Next, go to the Finances tab again. You will see two entries for each invoice. One entry is a "Void" status and the other entry is now a "Closed" status. The amount will also be highlighted in red in the Amount column for each invoice entry with a "Closed" status.

Print An Invoice

1. Go to the invoice you want to print.
2. When the invoice page is displayed, click on the "Printer" icon in the "Quick Links" section at the top of the page.
3. A new window will open. You can print the invoice from the new window using your browser's print function. This is done the same way you would print a web page.

Generate A Single (One-Off) Invoice

You can create and generate a single (one-off) invoice for anything.
Before You Begin

When you install ModernBill and check the default products in the installation wizard, the system will load several default products. One of the products created is the "Service" product and is specific to generating one-off invoices.

If a "Service" product has not been created, use the Non-Hosting Product instructions to create a product named "Service" or whatever name fits your one-off invoices appropriately. You only need to create this product one time for all one-off invoices.

Your "Service" product should have the following set:

Product Details

Billing Plan: One Time Only
Is Active: Yes

Product Order Forms: You need to associate the product with at least one order form. This must be done before you can set your default prices for the "Services" product.

Product Cycles: Select as many cycles as you need for your one-off invoices. For example, if you are providing a web design service for three months, select the "3 Months" option.

Product Prices: Enter a default price. You will be able to modify this price prior to generating your one-off invoice.

Creating A Single (One-Off) Invoice

1. Once you have setup or completed configuring your "Services" product, go to the client's account details page that you want to create and associate a one-off invoice.
2. Click on the "Create New Package" link.
3. A new window will appear. Select the "Services" product or the product you created for one-off invoices.
4. Select the cycle you want to charge for the invoice.
5. When the page loads, set the following:

Start Date: Select the start date for the invoice. The date you select will be the date and time the invoice is generated by the system.

Billing Account: Select the billing account you want to associate with this invoice. To learn more about billing accounts, read the Billing Account Summary section in the Client Details document.

Price: By default, the price you set initially will show up. Change the price to the amount you want to charge.

Setup Price: If there is a setup fee required, enter the price accordingly.

Server Groups: Server groups do not need to be associated with the "Services" package.

Invoice: Check the box to generate the invoice now instead of waiting for the system to generate it on the day you specific as the Start Date above. The Start Date will still show as the date you selected above, but the invoice will be generated immediately. The Due Date will also be based off today's date and not the Start Date.

6. Click on the "add new package" button.

Print (Export) an Invoice as PDF

1. Click the Finances tab.

2. Locate the invoice you want to print (export) as a PDF by navigating to the appropriate category and locating the corresponding invoice number. When the invoice page is displayed, click on the ">>" link next to the printer icon in the "Actions" column, which will give you the option to print a PDF.

3. Click the "Print PDF" link. Adobe Acrobat will open in your browser window with your invoice displayed in PDF format. To save the PDF, click the disk icon with the label "Save a Copy" in the top toolbar.

Manage Billing

There are no articles in this category.

Payment Queue

Payment Queue

Finances >> Manage Billing >> Payment Queue

1. Click on the Finances tab.
2. Click on the "Manage Billing" link in the left main sub nav.
3. Click on the "Payment Queue" link in the left sub nav.
4. The Payment Queue generates a list of all invoices that need to be processed or paid. Each record in the list includes:

- Queue ID
- Client
- Billing Account
- Description
- Date Created
- Amount
- Actions

Generate Payment Queue

Generate Payment Queue

Finances >> Manage Billing >> Generate Payment Queue

1. Click on the Finances tab.
2. Click on the "Manage Billing" link in the left main sub nav.
3. Click on the "Generate Payment Queue" link in the left sub nav.
4. When the page loads, set the following:

Invoice Options

Clear all items currently in Payment Queue: Check the box if you want to clear all items in the payment queue.

Generate: Check each of the following that apply.

New
Declined
Errored

Generate Due Date Only: Select Yes to generate invoices on their due date only.

Due on or before: The date you select from the drop down menus will generate invoices from that date and prior to that date. You can also click on the "..." button to select a date from the built-in calendar.

Number of invoices to generate payments for: Enter the number for the amount of invoices you want to generate.

Run Options

Try charging lesser amounts on failed accounts: Check the box if you want the system to attempt to charge lesser amounts than the invoice balance.

Run Payment Queue: You have two choices:

Don't Run
Run at a later date/time

Date to run Payment Queue: The date you select from the drop down menus will be the date the payment queue is run. You can also click on the "..." button to select a date from the built-in calendar.

Transaction Type: You have the following choices:

Charge
Authenticate Only
Enter your Credit Card Encryption Key

5. Click on the "continue" button.

Run Payment Queue

Run Payment Queue

Finances >> Manage Billing >> Run Payment Queue

1. Click on the Finances tab.
2. Click on the "Manage Billing" link in the left main sub nav.
3. Click on the "Run Payment Queue" link in the left sub nav.
4. When the page loads, set the following:
Run Options

Try charging lesser amounts on failed accounts: Check the box if you want the system to attempt to charge lesser amounts than the invoice balance.

Run Payment Queue: You have two choices:

Don't Run
Run at a later date/time

Date to run Payment Queue: The date you select from the drop down menus will be the date the payment queue is run. You can also click on the "..." button to select a date from the built-in calendar.

Transaction Type: You have the following choices:

Charge
Authenticate Only
Enter your Credit Card Encryption Key

5. Click on the "continue" button.

Uncaptured Funds

Uncaptured Funds

Finances >> Manage Billing >> Uncaptured Funds

1. Click on the Finances tab.
2. Click on the "Manage Billing" link in the left main sub nav.
3. Click on the "Uncaptured Funds" link in the "Managing Billing" left sub nav.
4. When the page loads you should see the following:

TID - Transactions ID
Code - The authorization code.
Gateway - The gateway associated with the transaction.
Created - The date the transaction was created.
Amount - The amount of the transaction.
Currency - The currency used for the transaction.
Client - The client name.
Client Status - The status of the client's account.

5. Click on each checkbox next to the record(s) you want to capture funds. Notice the record will highlight in red if it is checked.

6. Click on the "capture funds" button.

NOTICE! There is not a confirmation screen after clicking on the "capture funds" button. The funds will be captured automatically.

Callback Log History

Callback Log History

Finances >> Manage Billing >> Callback Log History

1. Click on the Finances tab.
2. Click on the "Manage Billing" link in the left main sub nav.
3. Click on the "Callback Log History" link in the "Manage Billing" left sub nav.
4. When the page loads you should see the following:

ID - Callback ID

Client Type - The gateway associated with the callback (PayPal, WorldPay, 2CheckOut)

Action - The callback action (Example: payment, refund)

Code - The code sent by the gateway

Date Created - The date the callback occurred

Actions - Replay the callback action

5. Click on the ID next to the record(s) you want to view in order to see raw data passed back from the gateway.

6. Click on the "Replay" link in order to replay the callback action. This results in the gateway performing the action again.

Callback Log Errors

Callback Log Errors

Finances >> Manage Billing >> Callback Log Errors

1. Click on the Finances tab.
2. Click on the "Manage Billing" link in the left main sub nav.
3. Click on the "Callback Log Errors" link in the "Manage Billing" left sub nav.

4. When the page loads you should see the following:

ID - Callback ID

Client Type - The gateway associated with the callback (PayPal, WorldPay, 2CheckOut)
Action - The callback action (Example: failed, expired)

Code - The code sent by the gateway
Date Created - The date the callback occurred

Actions - Replay the callback action

5. Click on the ID next to the record(s) you want to view in order to see raw data passed back from the gateway.

6. Click on the "Replay" link in order to replay the callback action. This results in the gateway performing the action again.

Payments

Generate And Run The Payment Queue

Before you can process invoices, you need to generate the payment queue. Generating the payment queue will create a list of invoices that will be paid via an automated method such as credit card or echeck. A transaction will be attempted through the gateway associated with the packages only when the payment queue is Run in the Events screen. Follow the instructions below to get started.

1. Go to Finances/Manage Billing/Generate Payment Queue.
2. When the page loads, set the following:

Invoice Options

Clear all items currently in Payment Queue: Check the box to clear all items currently in the payment queue.

Generate: Select from one of the following:

New
Declined
Errored

Generate Due Date Only: Select Yes if you want to generate payments based on invoice due dates only. Select No if you want to generate payments regardless of invoice due dates.

Due on or before: Select the date you want to generate payments on or before from the drop down menu or click on the "..." button to set the date using the built-in calendar.

Number of invoices to generate payments for: Enter the number of invoices you want to generate payments for or leave it as '0' to generate payments for all invoices.

Run Options

Try charging lesser amounts on failed accounts: Check the box if you want the system to automatically charge less amounts for invoices IF they fail on the initial payment processing.

Run Payment Queue: Select one of the following:

Don't Run
Run at a later date/time

Date to run Payment Queue: Set the date to run the payment queue in the drop down menu or click on the "... " button to select the date using the built-in calendar.
Transaction Type: Select one of the following:

Charge
Authenticate Only

Key formerly known as LEKey: Enter the key you generated when you setup your encryption settings.

3. Click on the "continue" button.

Issue A Refund

1. Go to the client's invoice you want to issue a refund.
2. Click on the "refund" button in the Status column located in the "Transactions" list.
3. When the page loads, you will see the following:

Invoice ID
Transaction ID
Refund Amount
Enter your Credit Card Encryption Key

Notes: Verify the above is correct. If you are using the LEK method for encrypting credit cards, you will not have to enter your Credit Card Encryption Key.

4. Click on the "yes, process this refund" button. If you do not want to process the refund, click on the "no, do not process this refund" button.

Apply A Quick Payment

1. Go to the invoice you want to apply a quick payment.
2. When the invoice page is displayed, click on the "Quick Manual Payment" in the "Quick Links" section at the top of the page.
3. Set the following:

Choose Billing Account: Select the billing account you want to use for this payment in the drop down menu.
Payment Method: Select the payment method you want to use for this payment in the drop down menu.
Check Number: If payment is being made by check, enter the check number.
Apply Payment To: Select "Entire Invoice" or "Selected Line Items." If you choose the "Selected Line Items" option, it will list the line items available for this invoice. Choose accordingly.
Amount of Payment: Enter the payment amount that you are applying to this invoice.
Payment Comments: Enter comments according to your specific needs.

4. Click on the "Apply Payment" button.

Capture Auth-only Payments

1. Go to the invoice you want to do an authenticate-only charge.
2. When the invoice page is displayed, click on the "Take Credit Card Payment" link in the "Quick Links" section at the top of the page.
3. When the page loads, you will notice the following:

Invoice Number
Amount
Amount Paid
Client
Gateway

4. Select the Gateway you want to use to an authenticate-only charge.
5. Enter all the payment information accordingly.
6. Select "Authenticate Only" in the "Charge Action" drop down menu.
7. Click on the "charge" button.

Set The Payment Queue Run Time

1. Go to System/Payment Settings/Payment Queue.
2. Set the following:

Payment Queue Action: Your choices are:

Charge - This determines whether the items in the payment queue get sent to the gateway as Charge, also called AUTH_CAPTURE.
Authenticate Only - Authorization Only and requires a payment capture at a later point in time.

Process New Invoices: Do you want to process new invoices? Select Yes/No.
Process Declined Transactions: Do you want to process declined transactions? Select Yes/No.
Process Errored Transactions: Do you want to process errored transactions? Select Yes/No.
Only Charge on the Due Date? Do you want to charge and process invoices on their due date only? Select Yes/No.
Clear the Payment Queue first: Do you want to clear the payment queue first? If you set this to No, invoices could get charged twice. Select Yes.
Try Lesser Amounts: If a transactions fails, do you want to try to process for lesser amounts on the credit card? This will process a partial payment if the lesser amount is successfully charged.
Batch Days Before Due: How many days do you want to batch invoices before their due date? Enter the number of days according to your specific needs.

3. Click on the "Save Settings" button.

Take A Miscellaneous Payment Using The Virtual Terminal

You can take payment for anything using the Virtual Terminal. To get started, follow the instructions below.

Note: The Virtual Terminal is not tied to invoices.

1. Go to System/Payment SettingsVirtual Terminals.
2. If you want to create income account entries, leave the "Create Income Accounting Entries" checked by default. More information regarding this feature will be provided at a later date.
3. Select the gateway you want to use for the Virtual Terminal and click on the "next" button.
4. Set the following:

Payment Information

First Name: Enter the client's first name.

Last Name: Enter the client's last name.

Customer Address: Enter the client's street address.

Suite: Enter the client's suite.

City: Enter the client's city.

State: Enter the client's state.

Zip: Enter the client's zipcode.

Customer Country: Select the client's country.

Phone: Enter the client's primary phone number.

Fax: If applicable, enter the client's fax number.

Amount of Payment: Enter the amount being paid.

Payment Comments: Enter any comments related to the payment.

Payment Type: Select the payment type associated with this payment.

Charge Action: Select the charge action. Fill out the section that appears next according to the charge action you chose.

5. Click on the "charge" button.

Using A Credit Card To Pay An Invoice

1. Go to the invoice you want to pay using a credit card.
2. When the invoice page is displayed, click on the "Take Credit Card Payment" link in the "Quick Links" section at the top of the page.
3. When the page loads, you will notice the following:

Invoice Number
Amount
Amount Paid
Client

Gateway

4. Select the Gateway you want to use to pay this invoice.
5. Enter all the payment information accordingly.
6. Click on the "charge" button.

Manually Pay an Invoice Using Saved Credit Card Information

ModernBill v5 gives you the flexibility to manually pay an invoice using saved credit card information, or automatically pay invoices using the payment queue. This document explains how to decrypt saved credit card information to manually charge an invoice. If you do not wish to view or re-enter the credit card information, please refer to the Generate and Run the Payment Queue document to automate the process.

1. Click "Clients".
2. When the page loads, locate the client whose invoice you want to pay by finding the client ID in the corresponding category (Active, Pending, etc.). Click on the client ID link.
3. When the page loads, click on the "Show All Billing Accounts" link in the Billing Account Summary panel in the center of the screen.
4. All billing accounts associated with this client will now be displayed. Click on the arrow next to the credit card you would like to use, which will expand with several options. These options include:

- Edit
- Remove
- Name On Card
- Type
- Expires
- Account Last Four

5. Click on the "magnifying glass" next to the Account Last Four digits. A box will pop up prompting you to enter the encryption key you chose when configuring your ModernBill (for more information on encryption, view the Encryption Settings document).
6. Enter your encryption key and click the "Submit" button. The decrypted credit card number will be displayed.
7. Copy the credit card number.
8. Go back to the client summary page and locate the invoice you wish to pay in the Last 5 Invoices panel at the bottom of the page.
9. Click the ID in Invoice No. column. When the invoice page is displayed, click on the "Take Credit Card Payment" link in the "Quick Links" section at the top of the page.
10. When the page loads, you will notice the following:

- Invoice Number
- Amount
- Amount Paid
- Client
- Gateway

11. Select the Gateway you want to use to pay this invoice and click "next". When the page loads, all general payment information for the client, including name, email, and address, will be pre-populated in the form.

12. Enter the amount you would like to charge in the Amount of Payment field.

13. Paste the saved credit card number you copied from step 7 in the "Credit Card Number" field and fill in any missing payment information accordingly.

14. Click on the "charge" button.

Events

There are no articles in this category.

Events

There are no articles in this category.

Run Events

Run Events

Events >> Events >> Run Events

Run Events
Rerun Events
 Run Events

1. Click on the Events tab.
2. Click on the "Events" link in the left main sub nav.
3. Click on the "Run Events" link in the left sub nav.
4. When the page loads you should see a list of event waiting to be run. Each record in the list contains the following:

ID: The event ID.
Command: The event command.
Created: Date the event was created.
Run: Date the event was run.
Started: Date the event was started.
Finished: Date the event was finished.
Status: Shows the status of the event such as:

New
Errored
Completed
Queue Rule
Cancelled

Actions: Click on the "View" link in the Actions column. An information section will drop down from the event record displaying the following:

Run - Click to run the selected event item.
Edit - Click to edit the selected event item.
Delete - Click to delete the selected event item.
MBAPI Command Input - Click to view the command input for the event item.
MBAPI Command Output - Click to view the command output for the event item.
Debug Run - Click to run debug mode on the event item.

Rerun An Event

If a particular event needs to be rerun, click on the green "pencil" icon in the "Finished" column next to the timestamp for the record you want to run again. Note that some events will not have this option as it only refers to "Completed" or "Errored" events in the system.

Filter By: Status

Filter By: Status

Events >> Events >> Filter By: Status

The "Filter By: Status" feature is designed to generate a list of events based on the following:

- Show All
- New
- Errored
- Completed
- Queue Rule
- Cancelled

Choose from the drop down menu available and click on the arrow box.

Filter By: Destination

Filter By: Destination

Events >> Events >> Filter By: Destination

The "Filter By: Status" feature is designed to generate a list of events based on the following modules:

- Show All
- Registrar
- Panel

Choose from the drop down menu available and click on the arrow box.

Filter By: Server Group

Filter By: Server Group

Events >> Events >> Filter By: Status

The "Filter By: Status" feature is designed to generate a list of events based on the following:

- Show All
- Server Group

Choose from the drop down menu available and click on the arrow box.

Filter By: Recurring

Filter By: Recurring

Events >> Events >> Filter By: Recurring

The "Filter By: Status" feature is designed to generate a list of events based on the following:

- Show All
- No
- Yes

Choose from the drop down menu available and click on the arrow box.

Search By: Keyword/ID

Search By: Keyword/ID

Events >> Events >> Search By: Keyword/ID

Enter a keyword or ID and press the arrow button. The system will retrieve all records related to the keyword or ID you are searching.

Email

Send An Email To A Customer

Easily send a customer a custom email.

1. Go to the client's details page specific to the client you want to send an email.
2. Click on the email address link next to "Email" in the "Primary Contact" section of the client details page.
3. By default, the client's email address will already be in the "Client Contacts To Send" list. If this is not correct, make the necessary changes accordingly.
4. Next, if this email requires a copy email, enter it in the "CC" field.
5. If this email requires an additional copy email (unseen by the recipient), enter it in the "BCC" field.
6. Enter a subject in the "Subject" field.
7. Enter your email message in the "Message Body" field.
8. Click on the "send" button.

Resending Previously Sent Email

To resend emails, follow the instructions below.

1. Go to Events/Emails/Manage Emails.
2. When the page loads, find the email you want to resend.
3. Click on the blue icon in the Actions column.
4. Click on the "resend" button.

Email Template Variables

Below is a list of email variables specific to each email template.

Package Info Email

Name

Variable

Your Company Name
{companyName}

Your Company URL
{companyURL}

Your Company Address 1
{companyAddress1}

Your Company Address 2
{companyAddress2}

Your Company City
{companyCity}

Your Company Address 1
{companyAddress1}

Your Company Address 2
{companyAddress2}

Your Company City
{companyCity}

Your Company State
{companyState}

Your Company Zip
{companyZip}

Contact First Name
{contactFirstName}

Contact Last Name
{contactLastName}

Contact Name
{clientCompany}

Contact Address 1
{contactAddress1}

Contact Address 2
{contactAddress2}

Contact City
{contactCity}

Contact State

{contactState}

Contact Zip
{contactZip}

Package Name
{packageName}

Package Price
{packagePrice}

Package IP
{packageIP}

Package Username
{packageUsername}

Package Password
{packagePassword}

Domain Name
{domainSLD}

Domain TLD
{domainTLD}

Nameserver 1
{nameserver1}

Nameserver 1 IP
{nameserver1IP}

Nameserver 2
{nameserver2}

Nameserver 2 IP
{nameserver2IP}

Nameserver 3
{nameserver3}

Nameserver 3 IP
{nameserver3IP}

Nameserver 4
{nameserver4}

Nameserver 4 IP
{nameserver4IP}

Contact Client URL

{ \$companyClientURL }

Contact Username
{ \$contactUsername }

Date
{ \$currentDateTime }

Invoice Email

Name
Variable

Your Company Name
{ \$companyName }

Your Company URL
{ \$companyURL }

Your Company Address 1
{ \$companyAddress1 }

Your Company Address 2
{ \$companyAddress2 }

Your Company City
{ \$companyCity }

Your Company Address 1
{ \$companyAddress1 }

Your Company Address 2
{ \$companyAddress2 }

Your Company City
{ \$companyCity }

Your Company State
{ \$companyState }

Your Company Zip

{companyZip}

Contact First Name
{contactFirstName}

Contact Last Name
{contactLastName}

Contact Name
{clientCompany}

Contact Address 1
{contactAddress1}

Contact Address 2
{contactAddress2}

Contact City
{contactCity}

Contact State
{contactState}

Contact Zip
{contactZip}

Invoice Number
{invoiceNumber}

Invoice Date Entered
{invoiceDateEntered}

Loop Line Items BEGINNING
{loop=lineltems}

Line Item Comments
Line Item Quantity
{lineltem.packageComments}
{lineltemQuantity}

Line Item Description
{lineltemDescription}

Line Item Price Amount
{lineltemPriceAmount}

Line Item Discount Amount
{lineltemDiscountAmount}

Line Item Tax Amount
{lineltemTaxAmount}

Line Item Total Amount
{lineItemTotalAmount}

Loop Line Items END
{/loop}

Invoice Amount
{invoiceAmount}

Invoice Date Due
{invoiceDateDue}

Invoice Comments
{invoiceComments}

Date
{currentDateTime}

Credit Card Payment

Name
Variable

Your Company Name
{companyName}

Your Company URL
{companyURL}

Your Company Address 1
{companyAddress1}

Your Company Address 2
{companyAddress2}

Your Company City
{companyCity}

Your Company Address 1
{companyAddress1}

Your Company Address 2
{companyAddress2}

Your Company City
{companyCity}

Your Company State
{companyState}

Your Company Zip
{companyZip}

Contact First Name
{contactFirstName}

Contact Last Name
{contactLastName}

Contact Name
{clientCompany}

Contact Address 1
{contactAddress1}

Contact Address 2
{contactAddress2}

Contact City
{contactCity}

Contact State
{contactState}

Contact Zip
{contactZip}

Invoice Number
{invoiceNumber}

Invoice Amount
{invoiceAmount}

Credit Card Type
{billingCardType}

Credit Card Number
{billingAccountNumLastFour}

Transaction Date/Time
{transactionDateCreated}

Transaction ID
{transactionCode}

Auth Return
{authReturn}

Auth Code
{authCode}

AVS Code
{avsCode}

Transaction Amount
{transactionAmount}

Notes
{transactionNotes}

Date
{currentDateTime}

eCheck Payment

Name
Variable

Your Company Name
{companyName}

Your Company URL
{companyURL}

Your Company Address 1
{companyAddress1}

Your Company Address 2
{companyAddress2}

Your Company City
{companyCity}

Your Company Address 1
{companyAddress1}

Your Company Address 2
{companyAddress2}

Your Company City
{companyCity}

Your Company State
{companyState}

Your Company Zip
{companyZip}

Contact First Name
{contactFirstName}

Contact Last Name
{contactLastName}

Contact Name
{clientCompany}

Contact Address 1
{contactAddress1}

Contact Address 2
{contactAddress2}

Contact City
{contactCity}

Contact State
{contactState}

Contact Zip
{contactZip}

Invoice Number
{invoiceNumber}

Invoice Amount
{invoiceAmount}

Bank Name
{billingBankName}

Bank ABA Code
{billingBankAbaCode}

Bank Account Number
{billingAccountNumLastFour}

Transaction Date/Time
{transactionDateCreated}

Transaction ID
{transactionCode}

Auth Return
{authReturn}

Auth Code
{authCode}

AVS Code
{avsCode}

Transaction Amount
{transactionAmount}

Notes
{transactionNotes}

Date
{currentDateTime}

Bank Draft Payment

Name
Variable

Your Company Name
{companyName}

Your Company URL
{companyURL}

Your Company Address 1
{companyAddress1}

Your Company Address 2
{companyAddress2}

Your Company City
{companyCity}

Your Company Address 1
{companyAddress1}

Your Company Address 2
{companyAddress2}

Your Company City
{companyCity}

Your Company State
{companyState}

Your Company Zip
{companyZip}

Contact First Name
{contactFirstName}

Contact Last Name
{contactLastName}

Contact Name
{clientCompany}

Contact Address 1
{contactAddress1}

Contact Address 2
{contactAddress2}

Contact City
{contactCity}

Contact State
{contactState}

Contact Zip
{contactZip}

Invoice Number
{invoiceNumber}

Invoice Amount
{invoiceAmount}

Bank Name
{billingBankName}

Bank ABA Code
{billingBankAbaCode}

Bank Account Number
{billingAccountNumLastFour}

Transaction Date/Time
{transactionDateCreated}

Transaction ID
{transactionCode}

Auth Return
{authReturn}

Auth Code
{authCode}

AVS Code
{avsCode}

Transaction Amount
{transactionAmount}

Notes
{transactionNotes}

Date
{currentDateTime}

Name
Variable

Your Company Name
{companyName}

Your Company URL
{companyURL}

Your Company Address 1
{companyAddress1}

Your Company Address 2
{companyAddress2}

Your Company City
{companyCity}

Your Company Address 1
{companyAddress1}

Your Company Address 2
{companyAddress2}

Your Company City
{companyCity}

Your Company State
{companyState}

Your Company Zip
{companyZip}

Contact First Name
{contactFirstName}

Contact Last Name
{contactLastName}

Contact Name
{clientCompany}

Contact Address 1
{contactAddress1}

Contact Address 2
{contactAddress2}

Contact City
{contactCity}

Contact State
{contactState}

Contact Zip
{contactZip}

Invoice Number
{invoiceNumber}

Credit Card Type
{billingCardType}

Credit Card Number
{billingAccountNumLastFour}

Transaction Date/Time
{transactionDateCreated}

Transaction ID
{transactionCode}

Auth Return
{authReturn}

Auth Code
{authCode}

AVS Code
{avsCode}

Transaction Amount
{transactionAmount}

Notes
{transactionNotes}

Date
{currentDateTime}

Secondary Gateway Payment

Name
Variable

Your Company Name
{companyName}

Your Company URL
{companyURL}

Your Company Address 1
{companyAddress1}

Your Company Address 2
{companyAddress2}

Your Company City
{companyCity}

Your Company Address 1
{companyAddress1}

Your Company Address 2
{companyAddress2}

Your Company City
{companyCity}

Your Company State
{companyState}

Your Company Zip
{companyZip}

Contact First Name
{contactFirstName}

Contact Last Name
{contactLastName}

Contact Name
{clientCompany}

Contact Address 1
{contactAddress1}

Contact Address 2
{contactAddress2}

Contact City
{contactCity}

Contact State
{contactState}

Contact Zip
{contactZip}

Gateway Name
{gatewayName}

Transaction Date/Time
{transactionDateCreated}

Transaction ID
{transactionCode}

Auth Return
{authReturn}

Auth Code
{authCode}

AVS Code
{avsCode}

Transaction Amount
{transactionAmount}

Notes
{transactionNotes}

Date
{currentDateTime}

Declined Payment

Name
Variable

Your Company Name
{companyName}

Your Company URL
{companyURL}

Your Company Address 1
{companyAddress1}

Your Company Address 2
{companyAddress2}

Your Company City
{companyCity}

Your Company Address 1
{companyAddress1}

Your Company Address 2
{companyAddress2}

Your Company City
{companyCity}

Your Company State
{companyState}

Your Company Zip
{companyZip}

Contact First Name
{contactFirstName}

Contact Last Name
{contactLastName}

Contact Name
{clientCompany}

Contact Address 1
{contactAddress1}

Contact Address 2
{contactAddress2}

Contact City
{contactCity}

Contact State
{contactState}

Contact Zip
{contactZip}

Invoice Number
{invoiceNumber}

Invoice Amount
{invoiceAmount}

Credit Card Type
{billingCardType}

Credit Card Number
{billingAccountNumLastFour}

Transaction Date/Time
{transactionDateCreated}

Transaction ID
{transactionCode}

Auth Return
{authReturn}

Auth Code
{authCode}

AVS Code
{avsCode}

Transaction Amount
{transactionAmount}

Notes
{transactionNotes}

Date
{currentDateTime}

Payment Error

Name
Variable

Your Company Name
{companyName}

Your Company URL
{companyURL}

Your Company Address 1
{companyAddress1}

Your Company Address 2
{companyAddress2}

Your Company City
{companyCity}

Your Company Address 1
{companyAddress1}

Your Company Address 2
{companyAddress2}

Your Company City
{companyCity}

Your Company State
{companyState}

Your Company Zip
{companyZip}

Contact First Name
{contactFirstName}

Contact Last Name
{contactLastName}

Contact Name
{clientCompany}

Contact Address 1
{contactAddress1}

Contact Address 2
{contactAddress2}

Contact City
{contactCity}

Contact State
{contactState}

Contact Zip
{contactZip}

Contact Client URL
{companyClientURL}

Invoice Number
{invoiceNumber}

Invoice Amount
{invoiceAmount}

Credit Card Type
{billingCardType}

Credit Card Number
{billingAccountNumLastFour}

Transaction Date/Time
{transactionDateCreated}

Transaction ID
{transactionCode}

Auth Return
{authReturn}

Auth Code
{authCode}

AVS Code
{avsCode}

Transaction Amount
{transactionAmount}

Notes
{transactionNotes}

Date
{currentDateTime}

Domain Renewal Notice

Name
Variable

Your Company Name
{companyName}

Your Company URL
{companyURL}

Your Company Address 1
{companyAddress1}

Your Company Address 2
{companyAddress2}

Your Company City
{companyCity}

Your Company Address 1
{companyAddress1}

Your Company Address 2
{companyAddress2}

Your Company City
{companyCity}

Your Company State
{companyState}

Your Company Zip
{companyZip}

Contact First Name
{contactFirstName}

Contact Last Name
{contactLastName}

Contact Name
{clientCompany}

Contact Address 1
{contactAddress1}

Contact Address 2
{contactAddress2}

Contact City
{contactCity}

Contact State
{contactState}

Contact Zip
{contactZip}

Domain Name
{domainSLD}

Domain TLD
{domainTLD}

Invoice Number
{invoiceNumber}

Invoice Amount
{invoiceAmount}

Invoice Date Entered
{invoiceDateEntered}

Domain Expiry Date
{domainDateExpires}

Date
{currentDateTime}

Domain Transfer - Success Email

Name
Variable

Your Company Name
{companyName}

Your Company URL
{companyURL}

Your Company Address 1
{companyAddress1}

Your Company Address 2
{companyAddress2}

Your Company City
{companyCity}

Your Company Address 1
{companyAddress1}

Your Company Address 2
{ \$companyAddress2 }

Your Company City
{ \$companyCity }

Your Company State
{ \$companyState }

Your Company Zip
{ \$companyZip }

Contact First Name
{ \$contactFirstName }

Contact Last Name
{ \$contactLastName }

Contact Name
{ \$clientCompany }

Contact Address 1
{ \$contactAddress1 }

Contact Address 2
{ \$contactAddress2 }

Contact City
{ \$contactCity }

Contact State
{ \$contactState }

Contact Zip
{ \$contactZip }

Domain Name
{ \$domainSLD }

Domain TLD
{ \$domainTLD }

Date
{ \$currentDateTime }

Domain Transfer - Failure Email

Name
Variable

Your Company Name
{companyName}

Your Company URL
{companyURL}

Your Company Address 1
{companyAddress1}

Your Company Address 2
{companyAddress2}

Your Company City
{companyCity}

Your Company Address 1
{companyAddress1}

Your Company Address 2
{companyAddress2}

Your Company City
{companyCity}

Your Company State
{companyState}

Your Company Zip
{companyZip}

Contact First Name
{contactFirstName}

Contact Last Name
{contactLastName}

Contact Name
{clientCompany}

Contact Address 1
{contactAddress1}

Contact Address 2

{contactAddress2}

Contact City
{contactCity}

Contact State
{contactState}

Contact Zip
{contactZip}

Domain Name
{domainSLD}

Domain TLD
{domainTLD}

Date
{currentDateTime}

Credit Card Expiration Notification Email

Name Variable

Your Company Name
{companyName}

Your Company URL
{companyURL}

Your Company Address 1
{companyAddress1}

Your Company Address 2
{companyAddress2}

Your Company City
{companyCity}

Your Company Address 1
{companyAddress1}

Your Company Address 2
{companyAddress2}

Your Company City
{companyCity}

Your Company State
{companyState}

Your Company Zip
{companyZip}

Contact First Name
{contactFirstName}

Contact Last Name
{contactLastName}

Contact Name
{clientCompany}

Contact Address 1
{contactAddress1}

Contact Address 2
{contactAddress2}

Contact City
{contactCity}

Contact State
{contactState}

Contact Zip
{contactZip}

Credit Card Type
{billingCardType}

Credit Card Number
{billingAccountNumLastFour}

Expire Month
{billingCardExpMonth}

Expire Year
{billingCardExpYear}

Date
{currentDateTime}

Package Suspension Emails

Name Variable

Your Company Name
{companyName}

Your Company URL
{companyURL}

Your Company Address 1
{companyAddress1}

Your Company Address 2
{companyAddress2}

Your Company City
{companyCity}

Your Company Address 1
{companyAddress1}

Your Company Address 2
{companyAddress2}

Your Company City
{companyCity}

Your Company State
{companyState}

Your Company Zip
{companyZip}

Contact First Name
{contactFirstName}

Contact Last Name
{contactLastName}

Contact Name
{clientCompany}

Contact Address 1
{contactAddress1}

Contact Address 2
{contactAddress2}

Contact City
{contactCity}

Contact State
{contactState}

Contact Zip
{contactZip}

Invoice Number
{invoiceNumber}

Contact Client URL
{companyClientURL}

Contact Username
{contactUsername}

Date
{currentDateTime}

Package Enable Email

Name
Variable

Your Company Name
{companyName}

Your Company URL
{companyURL}

Your Company Address 1
{companyAddress1}

Your Company Address 2
{companyAddress2}

Your Company City
{companyCity}

Your Company Address 1
{companyAddress1}

Your Company Address 2
{companyAddress2}

Your Company City
{companyCity}

Your Company State
{companyState}

Your Company Zip
{companyZip}

Contact First Name
{contactFirstName}

Contact Last Name
{contactLastName}

Contact Name
{clientCompany}

Contact Address 1
{contactAddress1}

Contact Address 2
{contactAddress2}

Contact City
{contactCity}

Contact State
{contactState}

Contact Zip
{contactZip}

Invoice Number
{invoiceNumber}

Invoice Amount Paid
{ \$invoiceAmountPaid }

Invoice Date Paid
{ \$invoiceDatePaid }

Package Name
{ \$packageName }

Date
{ \$currentDateTime }

Admin Daily Report
N/A

Affiliate Payout Email
N/A

Manage Emails

Manage Emails

Events >> Emails >> Manage Emails

1. Click on the Events tab.
2. Click on the "Emails" link in the left main sub nav.
3. Click on the "Manage Emails" link in the left sub nav.
4. When the page loads you will see a list of all the emails that have been sent to your customers. The list shows the following:

ID: The email ID.

From: The from email address.

Subject: The subject of the email.

Created: The date the email was created.

Sent: The date the email was sent.

Active: The status of the email.

Actions: Click on the "View" link to see the following information:

To - You can click on the "Details" link to view more information.

CC

BCC

Reply To

Additional Actions:

Resend - Click on the "Resend" link to resend the email to the customer.
Details - Click on the "Details" link to see the following information about the email.

- Email From Name
- Email From Address
- Status
- Date Created
- Date Sent
- Status Active Yes/No
- Email Address Destinations
- Email CC Address
- Email BCC Address
- Email Reply-To Address
- Attachments
- Headers
- Subject
- Message Body

Remove - Click on the "Remove" link to delete the email record from the database.

Purging Emails

If you want to purge emails, click on the checkbox next to each record ID. Then click on the "purge emails" button.

Email Template Groups

Email Template Groups

Events >> Emails >> Email Template Groups

1. Click on the Events tab.
2. Click on the "Emails" link in the left main sub nav.
3. Click on the "Email Template Groups" link in the left sub nav.
4. When the page loads you will see a list of all available email template groups and their associate email templates. The list includes:

- Package Info Email
- Invoice Email
- Credit Card Payment Email
- eCheck Payment Email
- Bank Draft Payment Email
- Manual Payment Email
- Secondary Gateway Payment Email
- Declined Payment Email
- Payment Error Email
- Domain Renewal Email
- Domain Transfer - Success Email
- Domain Transfer - Failure Email

Credit Card Expiration Notification Email
Package Suspension Emails
Package Enable EMail
Password Notifications
User Defined Emails
Admin Daily Report Email
Affiliate Payout Email

5. Next to each "Email Template Group" is an "add" button. To add a new email template to the group, click on the "add" button.

6. When the page loads, set the following options:

Email Template Group Name: Enter the name of template group you want to create.
Email Action: By default, the email action you selected on the previous page will already be selected. If not, select the type of email action from the Email Action drop down menu.

Email From: Name: Enter the "From" name.
Email Reply-To: Name: Enter the "Reply-To" name.
Email CC: Address: Enter the "CC" email address.
Email From: Address: Enter the "From" email address.
Email Reply-To: Address: Enter the "Reply-To" email address.
Email BCC: Address: Enter the "BCC" email address.

7. Click on the "save email template group data" button.

8. When the page loads, you will see a checkmark next to Email Templates at the bottom of the page. Click on the "add locale" button.

9. Set the following options:

Locale Language: Select the locale language you want to use from the drop down menu.

Locale Region/Country: Choose how you want to apply this email template.

Apply to All countries
Apply to ONE country
Apply to REGION of countries

Locale Language Default: This is used to indicate that the system should use this email template if it cannot match any another template to the contact's locale

Email Template Subject: Enter the subject of your email.

Email Template HTML Body: Enter the body of your email template in html format.

Email Template Text Body: Enter the body of your email template in text format.

Note: All contacts are set to receive HTML by default when they come through the order form. If you do not want a specific client to receive HTML emails, go to the client's account details page and click on the "edit primary" button. When the page loads, uncheck "HTML" for the Email Format. Click on the "edit contact" button.

10. Reload Options (New in 5.1.3): If you need to reload the original email templates, perform the following steps:

- a. Select the template you want to reload.
- b. Reload HTML: Select Yes.
- c. Reload Text: Select Yes.

Caution: this will replace this existing template. Please make a backup of your existing template if you do not wish to lose it.

11. Click on the "save" button.

12. When the page loads, you will see your new template added with the local you want to use

for the email template group you selected. You can add as many email templates to this group or any other group as you need based on your specific needs.

13. Repeat Steps 1-11 above until you have created all the templates you need specific to your needs.

Reloading Email Templates

Events >> Emails >> Email Template Groups

1. Click on the Events tab.
2. Click on the "Emails" link in the left main sub nav.
3. Click on the "Email Template Groups" link in the left sub nav.
4. When the page loads, click the pencil icon next to each email template you want to reload.
5. An email templates for each locale you have setup will display at the bottom of the page. Click the pencil icon in the Actions column.
6. At the bottom of the Edit Email Template page are the Reload Options. Select the template you want to reload from the dropdown box.
7. Select "Yes" for both Reload HTML and Reload Text.
8. Click the "reload" button. The template has now been reloaded.
9. Repeat steps 4-8 for each email template you wish to reload.

TIP: If you are reloading all 25 email templates, save time by opening each email template in step 4 in a new window or tab, and go through the remaining steps one screen at a time.

Filter By: Status

Filter By: Status

Events >> Emails >> Filter By: Status

The "Filter By: Status" feature is designed to generate a list of emails based on the following:

- Show All (Default)
- Inactive
- Active
- Unsent
- Sent

Choose from the drop down menu available and click on the arrow box.

Search By: Keyword/ID

Search By: Keyword/ID

Events >> Email >> Search By: Keyword/ID

Enter a keyword or ID and press the arrow button. The system will retrieve all records related to the keyword or ID you are searching.

ToDoS

Performing To-Do Items

Purpose

The purpose of the To-Do list is an automated reminder tool. Each task that you create will be listed until the action item is completed. For example, a To-Do task can be anything from reminding yourself to run by the accountant's office on Thursday to being an internal reminder to create a website on a control panel because the control panel you are using does not support automation of that action. Tasks can be assigned to any users in the system.

Choose one of the following:

Manage To-Dos
Show All To-Dos
Add New To-Do Tasks

Manage Todos

Manage To-Dos

Events >> To-Dos >> Manage To-Dos

When you first login to ModernBill the To-Do list appears by default. The list shows you what is currently due now, 24 hours from now, and 1 week from now. To respond to a To-Do item, click on the link associated with the To-Do you want to manage. To get started, follow the instructions below.

1. Click on the Events tab.
2. Click on the "To-Dos" link in the left main sub nav.
3. Click on the "Manage To-Dos" link in the left sub nav.
4. When the page loads you will see the available To-Do items, if applicable. If there are To-Do items available, click on the link to perform each To-Do.

Show All Todos

Show All To-Dos

Events >> To-Dos >> Show All To-Dos

By default, the list of To-Do features will be available on the left-hand side of the page in the sub-menu. To view or show all To-Do Tasks, click on the "Show All To-Dos" link. To get started, follow the instructions below.

1. Click on the Events tab.
2. Click on the "To-Dos" link in the left main sub nav.
3. Click on the "Show All To-Dos" link in the left sub nav.
4. When the page loads you will see the available To-Do items, if applicable. If there are To-Do items available, click on the link to perform each To-Do.

Each ToDo record shows the following:

Subject: The subject of the To-Do item. Click on the To-Do item to see the following information:

Title
Description - Click on the "Details" icon to see the following:

ID
Command
Created
Run
Started
Finished
Status
Actions

Author
Assigned Admins
Status
Date Due
Date Created

Buttons

Click on the "edit" button to edit the To-Do item
Click on the "delete" button to delete the To-Do item.

Assigned Admins: Admins assigned to the To-Do items.
Date Due: The date the To-Do items is due.
Status: The status of the To-Do item.
Actions: Your choices include:

Details - Click on the "Details" icon to view details about the To-Do.
Edit - Click on the "Edit" icon to edit the following:

Title: Modify the title of the To-Do item.
Description: Modify the description of the To-Do item.
Assigned Admins: Select the assigned Admin for the To-Do item.
Is Public: Click on the checkbox if the item is viewable to the public.

Status: Select the status from the drop down menu:

Open
Closed

Date Due: Select the date the To-Do item is due.

Remove - Click on the "Remove" icon to remove the To-Do item.

Add New Todo

Add New To-Do

Events >> To-Dos >> Add New To-Do

By default, the list of To-Do features will be available on the left-hand side of the page in the sub-menu. To add a new To-Do Tasks, follow the instructions below:

1. Click on the Events tab.
2. Click on the "To-Dos" link in the left main sub nav.
3. Click on the "Add New To-Do" link in the left sub nav.
4. Set the following:

Title: Enter a title for the To-Do you are creating.

Description: Enter a description for the To-Do you are creating.

Assigned Admins: Select the admin you want to assign the To-Do in the drop down menu.

Status: Select Open or Close from the drop down menu.

Is Public: Is the To-Do available to all admins? If so, check the box accordingly.

Date Due: Select the date you want the To-Do to be due.

5. Click on the "add to-do" button.

HelpDesk

Create A HelpDesk Department

1. To start using the Internal HelpDesk, click on the HelpDesk navigation button at the top of the ModernBill application.

Note: By default the Internal HelpDesk is preconfigured with two departments:

Sales Department
Tech Support Department

If you need to add additional departments to the Internal HelpDesk, click on the "HelpDesk Setup" link on the left side menu and continue on to Step 2.

2. A new menu will appear below the HelpDesk menu with three (3) options:

- Edit Departments
- Edit Buckets
- Edit Response Templates

3. Click on the "Edit Departments" link.

4. When the page loads you will see the two preconfigured departments listed. On the right side of the page is the Add New Department section.

Set the following:

Name: Enter the name of your new department.

Description: Enter a description of your new department.

Associated Admins: Select the administrators you want to have access to your new department. You can use hold ctrl+click to select multiple administrators.

5. Click on the "add department" button.

6. Your new department will appear on the left side once added.

Managing HelpDesk Tickets

1. Click on the HelpDesk button in the main navigation.

2. When the page loads, you will see a list of departments. If there are unassigned tickets (new tickets) available, they will be listed in a sub category called "Unassigned Tickets." Click on the arrow next to the "Unassigned Tickets" sub category.

3. You will be presented with the following:

Open Tickets: Click on this link to view a list of open tickets.

On-Hold Tickets: Click on this link to view a list of tickets that are on hold.

Closed Tickets: Click on this link to view a list of tickets that are closed.

Note: You can expand each department by clicking on the "Display/Hide Additional Data" link or by clicking on the arrows to the left of each sub category.

Each department list shows the following:

Bucket Name: Displays the bucket's links as described in Step 3 above.

Tickets: Shows the number of tickets in that section.

Last Replied: Shows the date the ticket was last replied.

Last Activity: Shows the date of the last activity.

Responding To Tickets

Note: All new tickets will be in the "Unassigned Tickets" sub category in its associated department. To learn more about "Unassigned Tickets," view the Managing HelpDesk Tickets article.

1. Once you are on the ticket details page, select a response template from the "Insert Response Template" drop down menu. To learn how to create a response template, view the Internal HelpDesk document.

2. Next, enter your response to the ticket in the "Your Response" textbox.

3. Set the status of the ticket in the "Actions" section. Your choices are as follows:

None

Closed
Pending

Note: If you want to leave the ticket in an "open" status, leave the Actions set to "None."

4. Click on the "send" button. Your client will see your message when they view the ticket id on the client's side.

Note: If you just want to add a note to the ticket, click on the "add note" button instead of the "send" button. A note will be added to the ticket under the "Ticket Notes" section.

HelpDesk

There are no articles in this category.

Search By: Keyword/ID

Search By: Keyword/ID

Clients >> Domains >> Search By: Keyword/ID

Enter a keyword or ID and press the arrow button. The system will retrieve all records related to the keyword or ID you are searching.

HelpDesk Setup

There are no articles in this category.

Edit Departments

Edit Departments

HelpDesk >> HelpDesk Setup >> Edit Departments

1. Click on the HelpDesk tab.
2. Click on the "HelpDesk Setup" link in the left main sub nav.
3. Click on the "Edit Departments" link in the left sub nav.
4. By default the Internal HelpDesk is preconfigured with two departments:

Sales Department

Tech Support Department

5. To modify the default departments or any of the previously created departments, continue on to Step 6.

6. Click on the "edit" icon in the Actions column for the department you want to modify.

Set the following:

Name: Modify the name of the department.

Description: Modify the description of the department.

Associated Admins: Select the administrators you want to have access to your department. You can use hold ctrl+click to select multiple administrators.

5. Click on the "edit department" button.

Edit Buckets

Edit Buckets

HelpDesk >> HelpDesk Setup >> Edit Buckets

1. Click on the HelpDesk tab.

2. Click on the "HelpDesk Setup" link in the left main sub nav.

3. Click on the "Edit Buckets" link in the left sub nav.

4. By default the Internal HelpDesk is preconfigured with buckets:

main sales bucket

main tech support bucket

5. To modify the default buckets or any of the previously created buckets, continue on to Step 6.

6. Click on the "edit" icon in the Actions column for the bucket you want to modify.

Set the following:

Name: Modify the name of the bucket.

Associated Departments: Select the department you want to associate this bucket.

Associated Admins: Select the administrators you want to have access to your bucket. You can use hold ctrl+click to select multiple administrators.

5. Click on the "edit bucket" button.

Edit Response Templates

There are no articles in this category.

Show Response Templates

Show Response Templates

HelpDesk >> HelpDesk Setup >> Edit Response Templates >> Show Response Templates

1. Click on the HelpDesk tab.
2. Click on the "HelpDesk Setup" link in the left main sub nav.
3. Click on the "Edit Response Templates" link in the left sub nav.
4. Click on the "Show Response Templates" link in the new left sub nav.
5. When the page loads, you will see a list of all available helpdesk response templates. Each record will show the following:

Subject
Admin
Actions

Add Response Template

Add Response Template

HelpDesk >> HelpDesk Setup >> Edit Response Templates >> Add Response Templates

1. Click on the HelpDesk tab.
2. Click on the "HelpDesk Setup" link in the left main sub nav.
3. Click on the "Edit Response Templates" link in the left sub nav.
4. Click on the "Add Response Templates" link in the new left sub nav.
5. When the page loads, Set the following:
 - Response Template Name: Enter the name of the helpdesk email response template.
 - Response Template Body: Enter the body of the helpdesk email response template. You can use any of the available "Field Name" variables in the "Fields" section.
 - Departments: Select the departments you want this helpdesk email response template to be associated. Hold down the "Ctrl" key while clicking on the departments you want to associate.
6. Click on the "add" button.

FAQs

There are no articles in this category.

Show FAQs

Show FAQs

HelpDesk >> FAQs >> Show FAQs

1. Click on the HelpDesk tab.
2. Click on the "FAQs" link in the left main sub nav.
3. Click on the "Show FAQs" link in the left sub nav.
4. When the page loads, the following will be shown:

FAQ Categories

This page allows you to edit and remove categories and FAQs.

Add FAQ Category

Add FAQ Category

HelpDesk >> FAQs >> Add FAQ Category

1. Click on the HelpDesk tab.
2. Click on the "FAQs" link in the left main sub nav.
3. Click on the "Add FAQ Category" link in the left sub nav.
4. When the page loads, set the following:

Name: Enter the name of the FAQ category.

Type: Select either "User" or "Admin" from the drop down menu.

Add another FAQ Category: If you want to continue adding new FAQ categories, click on the checkbox.

5. Click on the "add faq category" button.

Add FAQ

Add FAQ

HelpDesk >> FAQs >> Add FAQ Category

1. Click on the HelpDesk tab.
2. Click on the "FAQs" link in the left main sub nav.
3. Click on the "Add FAQ" link in the left sub nav.
4. When the page loads, set the following:

Category: Select the category you want to associate this FAQ. If you do not have a category available in the drop down menu that you want to use, read the Add FAQ Category document.

Question: Enter the FAQ question.

Answer: Enter the FAQ answer.

Add Another FAQ: If you want to continue adding new FAQs, click on the checkbox.

5. Click on the "add faq" button.

News

There are no articles in this category.

Show News

Show News

HelpDesk >> News >> Show News

1. Click on the HelpDesk tab.
2. Click on the "News" link in the left main sub nav.
3. Click on the "Show News" link in the left sub nav.
4. When the page loads, the following information will be shown per news item:

ID
Name
Description
Active
Action

Edit
Remove

This page allows you to edit and remove news groups.

Add News Group

Add News Group

HelpDesk >> News >> Add News Group

1. Click on the HelpDesk tab.
2. Click on the "News" link in the left main sub nav.
3. Click on the "Add News Group" link in the left sub nav.
4. When the page loads, set the following:

Group Name: Enter the name of the news group.

Description: Enter a description of the news group.

Active: If the news group is to be active, click on the "Active" radio button. If the news group is to be inactive, click on the "Inactive" radio button.

5. Click on the "add news group" button.

Add News

Add News

HelpDesk >>News >> Add News

1. Click on the HelpDesk tab.
2. Click on the "News" link in the left main sub nav.
3. Click on the "Add News" link in the left sub nav.
4. When the page loads, set the following:

News Group: Select the news group you want to associate this news item. If you do not have a news group available in the drop down menu that you want to use, read the Add News Group document.

Subject: Enter the subject.

Short Body: Enter the short description of the news body.

Body: Enter the body of the news item.

Active: If this news item is to be active, click on the "Active" radio button. If this news item is to be inactive, click on the "Inactive" radio button.

Priority: Select the priority of this news item from the drop down menu. Your choices

include:

Lowest
Low
Normal
High
Highest

5. Click on the "add" button.

Products

Creating Custom Questions

Creating Custom Questions

Custom questions are displayed in the shopping cart in a section called "Additional Customer Information" on the page where the customer enters their contact and payment information.

Note! Custom questions do not use pricing. Typically questions are general and are not associated with a particular product.

Example

Let's say you want to ask the customer the following question:

What is your primary email address?

To create the above question, follow the instructions below.

1. Click on the System tab.
2. Click on the "Custom Attributes" link in the "Order Settings" section.
3. When the page loads, click on the "new generic attribute" button.
4. There are two sections: Setup Internal Values and Setup Display Values

Set the following accordingly:

Setup Internal Values:

Generic Attribute Key: Enter a key that represents the custom question. (Not displayed)

Example: primary-email

Generic Question Name: Enter a name that represents the custom question you are asking. (Not displayed)

Example: Primary-Email

Setup Display Values:

Default Question: Enter the custom question you are asking. (Displayed)

Example: What is your primary email address?

Default Answer Value: Enter a default value as the answer to your custom question. (Displayed)
Question Description: Enter a description that best represents your custom question. (Displayed)

5. Click on the "save" button.

6. When the page loads, you should see the following:

7. Click on the "pencil" icon next to "Generic Attribute" in the "Subtype" column.

8. Select "Order Form Attribute" from the "Subtype" drop down menu.

9. Click on the "Edit" button.

10. Once you click on the "Edit" button in Step 9 above and the page loads, the "pencil" icon will appear next to "None" in the "Attributes" column. Click on the "pencil" icon next to "None" in the "Association" column.

11. Select the order form you want your custom question to appear in from the "Order Form" drop down menu.

12. Click on the "Edit" button.

13. When the page refreshes, your custom question settings should look similar to the following:

14. Now when your customers get to the information page in the shopping cart, they will see your custom question listed similar to below:

15. Repeat Steps 1-14 above to add as many questions as you need specific to your business model.

Making A Product Upgradeable/Downgradeable

1. Click on the Products tab.
2. Click on the "Show Products" link in the Products left sub nav.
3. Find the product you want make upgradeable/downgradeable.
4. When the page loads, click on the "upgrade/downgrade" link.
5. Set the following:

May Upgrade To: Move the products(s) from the Selectable list on the right to the Selected list on the left. You can double-click each product or you can use the arrows at the bottom of each list.

May Downgrade To: Move the product(s) from the Selectable list on the right to the Selected list on the left. You can double-click each product or you can use the arrows at the bottom of each list.

6. Click on the "save changes" button.

Products

Creating Product Add-Ons

Creating Product Add-Ons

Tip: You may also find the Creating add-ons, custom questions, and attributes document helpful as an additional resource.

First note there are several types of add-ons:

- Control Panel Attributes Add-Ons (See Example Below)
- Custom Package Add-Ons (See Example Below)

Control Panel Attributes Add-Ons

Control panel attributes add-ons MUST be supported by the control panel you are using. For example, if you are using cPanel as your control panel, the system will automatically pull in information regarding your cPanel control panel attributes. View Control Panel Attributes Add-Ons Instructions

Custom Package Add-Ons

You can create any type of add-on such as web design, bandwidth, database support, extended

support, hardware, software, or anything that meets your specific business needs. Custom package add-ons are typically presented with a question/answer setup. View Custom Package Add-Ons

Control Panel Attributes Add-Ons Instructions

1. Go to the Product Details page of the product you want to add control panel attributes add-ons.
2. Click on the "server groups" link. When the page loads, make sure you have moved the server group(s) from the Selectable list to the Selected list by double-clicking each server group entry or use the arrow buttons. Then click on the "edit product server groups" button. To learn more about server groups, view the Setting Up A Server Group document.
3. Next, click on the "add-ons" link.
4. When the page loads, and assuming you have a server group selected from Step 2 above, click on the "create new addons for this product" button. The next screen shows the following:

Panel Attribute to Change: Select the attribute/custom question you want to use for this add-on from the drop down menu.

New or Update Existing Addon: Leave as default.

Addon HTML Display Type: Select from one of the following in the drop down menu.

Radio Buttons
Select Menu
Checkboxes

Addon Display Label: Enter the display you want to use for the add-on label.

How Many Options Do You Need?: Select how many options you want to give the customer for this particular add-on from the drop down menu. For our example we chose 2 as the number of options.

Note: You can only add five (5) options at a time when configuring an add-on. If you need more than five (5) options, follow the instructions below (This assumes you have already created an add-on, otherwise you will not be able to add more options):

- a. Go to Products.
- b. Find the product you want to use to modify the add-on and click on the "details" link.
- c. When the page loads, click on the "add-ons" link.
- d. Next, click on the "create new option" button at the bottom of the options list.
- e. You can then select the number of options you need to add in the "How Many Options Do You Need?" drop down menu. Notice the "Panel Attribute to Change" and the "New or Update Existing Addon" settings are prepopulated.
- f. Continue through the wizard until you have added your additional options. If you need to add another group of five (5), or less depending on the total needed, repeat steps 'a' through 'e' above.

5. Click on the "next" button.

6. When the page loads you will see two sections: Option Display Name and Option Internal Value(s)

Set the following accordingly.

Option Display Name:

Replace "Name 1" with the display name you want to use for option one.

Replace "Name 2" with the display name you want to use for option two.

Optional Internal Value(s):

Enter the values you want to be used internally based on the Option Display Name 1.

Enter the values you want to be used internally based on the Option Display Name 2.

7. Click on the "next" button.

-
8. Enter prices for your options in the "General" and "Setup" textboxes for each cycle.
 9. Click on the "next" button.
 10. If there are matching products that you would like to associate this add-on, make your selection and click on the "finish" button.
 11. When the page loads, you should see your new add-on listed.
 12. Click on the "details" link.
 13. Select one of the following options from the "Associate Addon" drop down menu:

Optional
Required
Suppressed

Note: Your add-on will appear in the order form if you select "Optional" or "Required." By default option "NONE" appears. Your customers will select an add-on and click the "save add-ons" button.

14. Click on the "save" button.

Custom Package Add-Ons

1. Click on the System tab.
2. Click on the "Custom Attributes" link in the "Order Settings" section.
3. When the page loads, click on the "new generic attribute" button.
4. There are two sections: Setup Internal Values and Setup Display Values

Set the following accordingly:

Setup Internal Values:

Generic Attribute Key: Enter a key that represents the add-on question. (Not displayed)

Example: Choose OS

Generic Question Name: Enter a name that represents the question you are asking for the add-on. (Not displayed)

Example: Which OS

Setup Display Values:

Default Question: Enter the question you are asking for the add-on. (Displayed)

Example: Which operating system do you want installed on your server?

Default Answer Value: Enter a default value if applicable to your business model. (Displayed)

Question Description: Enter a description that best represents your question. (Displayed)

5. Click on the "save" button.
6. Click on the Products tab.
7. When the page loads, find the product you want to associate the add-on you created above.

8. Click on the "Details" link in the Action column for the product you chose.
9. When the page loads you will be on the product details page. Find the "Addon Options" setting. Select either "optional" or "required" in the drop down menu.
10. Click on the "save" button.
11. When the page loads, click on the "attributes" link.
12. Click on the green "pencil" icon. A window will open. Leave the "Name" textbox empty and click on the "Add" button.
13. When the page loads, click on the "add-ons" link.
14. Next, click on "create new addons for this product" button.
15. Set the following:

Panel Attribute to Change: Select the attribute/custom question you want to use for this add-on from the drop down menu.
New or Update Existing Addon: Leave as default.
Addon HTML Display Type: Select from one of the following in the drop down menu.

Radio Buttons
Select Menu
Checkboxes

Addon Display Label: Enter the display you want to use for the add-on label.
How Many Options Do You Need?: Select how many options you want to give the customer for this particular add-on from the drop down menu. For our example we chose 2 as the number of options.

Note: You can only add five (5) options at a time when configuring an add-on. If you need more than five (5) options, follow the instructions below (This assumes you have already created an add-on, otherwise you will not be able to add more options):

- a. Go to Products.
- b. Find the product you want to use to modify the add-on and click on the "details" link.
- c. When the page loads, click on the "add-ons" link.
- d. Next, click on the "create new option" button at the bottom of the options list.
- e. You can then select the number of options you need to add in the "How Many Options Do You Need?" drop down menu. Notice the "Panel Attribute to Change" and the "New or Update Existing Addon" settings are prepopulated.
- f. Continue through the wizard until you have added your additional options. If you need to add another group of five (5), or less depending on the total needed, repeat steps 'a' through 'e' above.

16. Click on the "next" button.

17. When the page loads you will see two sections: Option Display Name and Option Internal Value(s)

Set the following accordingly.

Option Display Name:

Replace "Name 1" with the display name you want to use for option one.
Replace "Name 2" with the display name you want to use for option two.

Optional Internal Value(s):

Enter the values you want to be used internally based on the Option Display Name 1.
Enter the values you want to be used internally based on the Option Display Name 2.

Below is an example:

Set Configurations Options

Option Display Name
Optional Internal Value(s)

CentOS
CentOS

RedHat 7
RH 7

18. Click on the "next" button.
19. Enter prices for your options and click on the "next" button.
20. Click on the "finish" button.
21. When you browse to where your ModernBill order form is located you will see the add-ons you have created.

Creating General Ledger Entries For A Product

Understanding Product Ledger Entries

Consider the following flow:

Products (Sellable) to Packages (Client) to Accounting (Entries)

Setting up ledger entries at the product level creates a template the system can use when a client orders a package. Remember, a product is what you sell and a package is the client's association to the product. When an invoice is generated and paid, the product ledger creates "debits" and "credits" entries in the database.

For example, let's say you want to track the cost of a domain (what you pay to the registrar). Your product ledger entries would look similar to the following:

Adding The Ledger Entries

To learn how to create the ledger entries you see above, follow the instructions below.

1. Click on the Products tab.
2. Click on the "Details" link for the product you want to add a ledger to in the Actions column.
3. When the page loads, click on the "prices" link. If the "prices" link is not clickable, click on the "advanced" link as it will unlock the "prices" link.
4. Next, click on the "Edit" link in the Ledger column.

5. Click on the "add ledger entry group" button.

6. Set the following:

Ledger Group Name: Enter the name of the ledger group you are creating for this product. For example, if this group covers the cost of this product, you may want to name it "Domain Registration Cost" or whatever makes sense to your business.

Filter Currencies: The ledger entries get created when the product is ordered through your order form. If you have multiple currencies setup such as USD and GBP, move the currencies from the Selectable list to the Selected list by double-clicking on each one or using the arrow buttons. Ledger entries will be created ONLY if the currency is in the Selected list.

Filter Cycles: Similar to Filter Currencies, you can select what cycles you want to have created when a particular cycle is used. Move the cycles from the Selectable list to the Selected list by double-clicking on each one or using the arrow buttons. Ledger entries will be created ONLY if the currency is in the Selected list.

Currency Of Ledger Entries: The currency you select will most likely be your native currency or the currency you use to setup your products. You can still create ledger entries for any currency, but you will see the entries such as "cost of domain" in the currency you select from the drop down menu.

Ledger Entries: Follow the instructions below:

Create two ledger entries for the GL Account (General Ledger) account by clicking on the "+add ledger entry" button.

Select a ledger account to use such as "10000 - Cash 1" from the GL Account drop down menu.

Enter a Description.

Enter the cost of the product in the "Credits" textbox.

Next, click on the "+ add ledger entry" button again.

Select a ledger account to use such as "50000 - Cost of Goods" from the GL Account drop down menu.

Enter a Description.

Enter the cost of the product in the "Debits" textbox. Make sure you tab over or click to another box after entering the amount.

7. Click on the "save" button.

Show Products

There are no articles in this category.

Create New Product

There are no articles in this category.

Undefined Product

Undefined Products

Products >> Products >> Create New Product >> Undefined Product

You can follow each section below in the order listed to configure your new product. Or if you need to reference any of the sections available when creating your new product, use the quick links below.

Getting Started
Order Forms
Cycles
Options
Prices
Coupons
Upgrade/Downgrade
Usage Pricing
Server Groups
Attributes
Add-Ons
Emails
Notifications
Clone Product
Advanced
 Getting Started

1. Click on the Products tab.
2. Click on the "Products" link in the left main sub nav.
3. Select "Undefined Product" from the "Create New Product" drop down menu, then click on the arrow to the right.
4. Once the page loads, all of the links such as cycles, options, prices, etc are clickable. The system is designed to take you step-by-step through creating a product by making specific options available once the mandatory options have been completed.
5. Complete each of the settings shown:
 - Type: By default you have selected "Undefined Product" as the type for this product.
 - Pricing: By default the "Regular" pricing is selected. If you require pricing options, please view the [Creating Pricing Options](#) article.
 - Name: Enter the name of your product.
 - Comments: Enter any comments you to associate with this product.
 - Billing Plan: Select the type of billing cycle you want to use for this product. Your choices are:

Forever
One Time Only
Fixed Duration

Is Active: Do you want the product to be active? Select Yes.
Is Proratable: Do you want the product to be proratable? Select Yes.
Is Discountable: Do you want the product to be discountable? Select Yes.
Associate Addon: If this is not an addon product and you would like to associate addons with this product, select from the drop down menu. Your choices are:

Optional

Required
Suppressed

Associate Domain: Select how you want domains to be associated with this product from the drop down menu. Your choices are:

Optional
Required
Suppressed

Cancellation Rules: Select from the following:

Admins can cancel (Suspend)
Admins and Clients can cancel (Suspend)
Admins can cancel (DELETE!)
Admins and Clients can cancel (DELETE!)

Date Created: This is preset by the system and cannot be modified. Product Groups: Move the product group from the Selectable list on the right to the Selected list on the left. You can double-click each product group or you can use the arrows at the bottom of each list . To learn more about Product Groups, view the Creating and Managing Product Groups article.

Product Groups: If you have created product groups and you want to associate this product with a product group, double-click the product group name from the Selectable list or use the arrow buttons. Read the Add Product Group document.

6. Once you have completed the above, click on the "save" button.

Order Forms

1. Next, click on the "order forms" link.

2. By default "OF 1" (Order Form 1) is in the Selectable list. If you have created more order forms, select the appropriate order form(s) from the Selectable list that you want to associate your hosting product. Remember that order forms are specific to "cart" settings such as locale, currency, and other settings. The product will show up in the website widgets that you configure. Products can be associated with as many website widgets and order forms specific to your business. There is not a limitation on the number you can setup. Read the Add Website Widget document to learn more about website widgets.

3. Click on the "edit product order forms" button.

Cycles

1. When the page loads, notice two new options are available. Click on the "cycles" link. Move the cycles(s) from the Selectable list on the right to the Selected list on the left. You can double-click each cycle or you can use the arrows at the bottom of each list . If a cycle is not available that you would like to use, view the Add Cycles article.

2. Click on the "edit product cycles" button.

Options

1. When the page loads, you will notice all the links are available. Click on the "options" link.

2. Move the pricing option value(s) from the Selectable list on the right to the Selected list on the left. You can double-click each pricing option value or you can use the arrows at the bottom of each list . If you need to learn more about pricing options, view the Add Pricing Options article.

3. Next, click on the "edit pricing options" button.

Prices

1. Click on the "prices" link.
2. When the page loads, you will see a list of prices for your product and/or pricing options. Click on the "edit" icon in the Pricing column.
3. Set the following:

Tax Zone Group: NEEDS MORE INFO

Cycle Discount Group: NEEDS MORE INFO

4. Enter "General" and "Setup" prices for each cycle accordingly.
5. Click on the "edit product variant prices" button.
6. When the page loads, click on the product name you are configuring in the "Variation of" column.

Coupons

1. Click on the "coupons" link.
2. If you have created coupons and want to associate them with this product, double-click the coupons in the Selectable list or use the arrow buttons. Read the Add Coupons document to learn how to create and add new coupons to the system. Also, if you would like a specific coupon to be pre-applied to this new product, select the coupon name from the "Pre Applied Coupon" drop down menu.
3. Click on the "edit product coupons" button.

Upgrade/Downgrade

1. Click on the "upgrade/downgrade" link.
2. Set the following:

May Upgrade To: Move the products(s) from the Selectable list on the right to the Selected list on the left. You can double-click each product or you can use the arrows at the bottom of each list.

May Downgrade To: Move the product(s) from the Selectable list on the right to the Selected list on the left. You can double-click each product or you can use the arrows at the bottom of each list.

3. Click on the "save changes" button.

Usage Pricing

1. Click on the "usage pricing" link.
2. Enter the price that you are charging per usage unit. If you charge X amount per GigaByte used over Y limit, then your price would be what you would charge for each GigaByte over that specific limit.
3. Click on the "save usage pricing" button.

Server Groups

1. Click on the "server groups" link.
2. If you have setup and configured your server groups, move the server groups from the Selectable list to the Selected list by double-clicking or using the arrows. To learn more about server groups, read the Setting Up A Server Group document.
3. Click on the "edit product server groups" button.

Attributes

To learn how to create Attributes for your products, view the Creating Product Add-Ons document.

Add-Ons

To learn how to create Add-Ons for your products, view the Creating Product Add-Ons document.

Emails

1. Click on the "emails" link.
2. Select "packageInfo - Hosting Product" from the Welcome Email drop down menu.
3. Click on the "edit product emails" button.

Notifications

1. Click on the "notifications" link.
2. Select one of the following from the "Group To Notify On Event." drop down menu:

None

admin

cronadmin

3. Click on the "save" button.

Clone Product

NOTICE!! When you click on the "clone product" link, it will automatically create an exact duplicate of the product you are currently creating/modifying. When the new page loads after you click on the "clone product" link, rename the product to your new product's name, otherwise you will have two copies of the same product.

Advanced

The advanced option is specific to the add-ons for your product. If you click on the "advanced" link in your product screen, the following new options appear in the details section:

Is Option

Addon Group

Question

Fee Product

Fee Product

Products >> Products >> Create New Product >> Fee Product

You can follow each section below in the order listed to configure your new product. Or if you need to reference any of the sections available when creating your new product, use the quick links below.

Getting Started
Order Forms
Cycles
Options
Prices
Coupons
Upgrade/Downgrade
Usage Pricing
Server Groups
Attributes
Add-Ons
Emails
Notifications
Clone Product
Advanced

Getting Started

1. Click on the Products tab.
2. Click on the "Products" link in the left main sub nav.
3. Select "Fee Product" from the "Create New Product" drop down menu, then click on the arrow to the right.
4. Once the page loads you will notice all of the links such as cycles, options, prices, etc are clickable. The system is designed to take you step-by-step through creating a product by making specific options available once the mandatory options have been completed. Leave the screen on the default product details settings and continue with Step 5 below.
5. Complete each of the settings shown:
 - Type: By default you have selected "Fee Product" as the type for this product.
 - Pricing: By default the "Regular" pricing is selected. If you require pricing options, please view the Creating Pricing Options article.
 - Name: Enter the name of your product.
 - Comments: Enter any comments you to associate with this product.
 - Billing Plan: Select the type of billing cycle you want to use for this product. Your choices are:

Forever
One Time Only
Fixed Duration

Is Active: Do you want the product to be active? Select Yes.
Is Proratable: Do you want the product to be proratable? Select Yes.
Is Discountable: Do you want the product to be discountable? Select Yes.
Associate Addon: If this is not an addon product and you would like to associate addons with this product, select from the drop down menu. Your choices are:

Optional
Required
Suppressed

Associate Domain: Select how you want domains to be associated with this product from the drop down menu. Your choices are:

Optional
Required
Suppressed

Cancellation Rules: Select from the following:

Admins can cancel (Suspend)
Admins and Clients can cancel (Suspend)
Admins can cancel (DELETE!)
Admins and Clients can cancel (DELETE!)

Date Created: This is preset by the system and cannot be modified. Product Groups: Move the product group from the Selectable list on the right to the Selected list on the left. You can double-click each product group or you can use the arrows at the bottom of each list. To learn more about Product Groups, view the Creating and Managing Product Groups article.

Product Groups: If you have created product groups and you want to associate this product with a product group, double-click the product group name from the Selectable list or use the arrow buttons. Read the Add Product Group document.

6. Once you have completed the above, click on the "save" button.

Order Forms

1. Next, click on the "order forms" link.

2. By default "OF 1" (Order Form 1) is in the Selectable list. If you have created more order forms, select the appropriate order form(s) from the Selectable list that you want to associate your hosting product. Remember that order forms are specific to "cart" settings such as locale, currency, and other settings. The product will show up in the website widgets that you configure. Products can be associated with as many website widgets and order forms specific to your business. There is not a limitation on the number you can setup. Read the Add Website Widget document to learn more about website widgets.

3. Click on the "edit product order forms" button.

Cycles

1. When the page loads, notice two new options are available. Click on the "cycles" link. Move the cycles(s) from the Selectable list on the right to the Selected list on the left. You can double-click each cycle or you can use the arrows at the bottom of each list. If a cycle is not available that you would like to use, view the Add Cycles article.

2. Click on the "edit product cycles" button.

Options

1. When the page loads, you will notice all the links are available. Click on the "options" link.

2. Move the pricing option value(s) from the Selectable list on the right to the Selected list on the left. You can double-click each pricing option value or you can use the arrows at the bottom of each list. If you need to learn more about pricing options, view the Add Pricing Options article.

3. Next, click on the "edit pricing options" button.

Prices

1. Click on the "prices" link.

2. When the page loads, you will see a list of prices for your product and/or pricing options. Click on the "edit" icon in the Pricing column.

3. Set the following:

Tax Zone Group: NEEDS MORE INFO

Cycle Discount Group: NEEDS MORE INFO

4. Enter "General" and "Setup" prices for each cycle accordingly.

5. Click on the "edit product variant prices" button.

6. When the page loads, click on the product name you are configuring in the "Variation of" column.

Coupons

1. Click on the "coupons" link.

2. If you have created coupons and want to associate them with this product, double-click the coupons in the Selectable list or use the arrow buttons. Read the Add Coupons document to learn how to create and add new coupons to the system. Also, if you would like a specific coupon to be pre-applied to this new product, select the coupon name from the "Pre Applied Coupon" drop down menu.

3. Click on the "edit product coupons" button.

Upgrade/Downgrade

1. Click on the "upgrade/downgrade" link.

2. Set the following:

May Upgrade To: Move the products(s) from the Selectable list on the right to the Selected list on the left. You can double-click each product or you can use the arrows at the bottom of each list.

May Downgrade To: Move the product(s) from the Selectable list on the right to the Selected list on the left. You can double-click each product or you can use the arrows at the bottom of each list.

3. Click on the "save changes" button.

Usage Pricing

-
1. Click on the "usage pricing" link.
 2. Enter the price that you are charging per usage unit. If you charge X amount per GigaByte used over Y limit, then your price would be what you would charge for each GigaByte over that specific limit.
 3. Click on the "save usage pricing" button.

Server Groups

1. Click on the "server groups" link.
2. If you have setup and configured your server groups, move the server groups from the Selectable list to the Selected list by double-clicking or using the arrows. To learn more about server groups, read the Setting Up A Server Group document.
3. Click on the "edit product server groups" button.

Attributes

To learn how to create Attributes for your products, view the Creating Product Add-Ons document.

Add-Ons

To learn how to create Add-Ons for your products, view the Creating Product Add-Ons document.

Emails

1. Click on the "emails" link.
2. Select "packageInfo - Hosting Product" from the Welcome Email drop down menu.
3. Click on the "edit product emails" button.

Notifications

1. Click on the "notifications" link.
2. Select one of the following from the "Group To Notify On Event." drop down menu:

None

admin

cronadmin

3. Click on the "save" button.

Clone Product

NOTICE!! When you click on the "clone product" link, it will automatically create an exact duplicate of the product you are currently creating/modifying. When the new page loads after you click on the "clone product" link, rename the product to your new product's name, otherwise you will have two copies of the same product.

Advanced

The advanced option is specific to the add-ons for your product. If you click on the "advanced" link in your product screen, the following new options appear in the details section:

Is Option

Addon Group

Question

Hosting Product

Hosting Product

Products >> Products >> Create New Product >> Hosting Product

Hosting products are ideal for selling shared web hosting, VPS, dedicated servers, or game server hosting. Follow each section below in the order listed to configure your new product, or use the quick links below if you need to reference any of the sections available when creating your new product.

Getting Started

1. Click on the Products tab.
2. Click on the "Products" link in the left main sub nav.
3. Select "Hosting Product" from the "Create New Product" drop down menu, then click on the arrow to the right.
4. Once the page loads you will notice most of the links such as cycles, options, prices, etc are not clickable. The system is designed to take you step-by-step through creating a product by making specific options available once the mandatory options have been completed. Leave the screen on the default product details settings and continue with the steps below.

Details
Order Forms
Cycles
Options
Prices
Coupons
Upgrade/Downgrade
Usage Pricing
Server Groups
Attributes
Add-Ons
Emails
Notifications
Clone Product
Advanced
Details

Details are grouped into three sections: Product Display Information, Internal Settings, and Billing Options And Settings.

Complete each of the settings shown:

Product Display Information

Product Display Information contains fields that will show up on your order form or website widgets.

Display Name: Enter the name of your product.

Product Description: Enter any comments or descriptions you would like to have appear with this product.

Addon Option: If this is not an addon product and you would like to give customers the ability to associate addons with this product, select from the drop down menu. Your choices are:

Optional - addon can be added, but is not required

Required - customer must select an addon before proceeding

Hide - addon field is suppressed or hidden from view

Domain Option: Select how you want domains to be associated with this product from the drop down menu. Your choices are:

Optional - domain can be added, but is not required

Required - customer must select a domain before proceeding

Hide - domain field is suppressed or hidden from view

Internal Settings

Internal Settings contains settings that affect the product's status within your system.

Is Active: Do you want the product to be active? Select Yes.

Product Type: By default you have selected "Hosting Product" as the type for this product

Date created: This is preset by the system and cannot be modified.

Billing Options And Settings

Billing Options And Settings contains fields that affect the way this product will be billed.

Pricing (Advanced): By default the "Regular" pricing is selected. If you require pricing options, please view the [Creating Pricing Options](#) article.

Duration To Be Billed: Select the type of billing cycle you want to use for this product. Your choices are:

Forever - product will automatically renew at the end of each billing cycle

One Time Only - product will only be charged once

Fixed Duration - product will be renewed a specified number of times

Prorate Product?: Do you want the product to be prorable? Select Yes.

Allow Discount To Be Applied?: Do you want the product to be discountable? Select Yes.

Cancellation Permissions: Assign permissions to cancel this product. Note: enabling clients to cancel will give clients the option to cancel their packages from the

client dashboard. Select from the following:

- Admins can cancel (suspend)
- Admins and clients can cancel (suspend)
- Admins can cancel (DELETE!)
- Admins and clients can cancel (DELETE!)

Product Groups (Advanced): Move the product group from the Selectable list on the right to the Selected list on the left. You can double-click each product group or you can use the arrows at the bottom of each list . To learn more about Product Groups, view the Creating and Managing Product Groups article. Using Product Groups: If you have created product groups and you want to associate this product with a product group, double-click the product group name from the Selectable list or use the arrow buttons. Read the Add Product Group document.

Once you have completed the above, click on the "save" button.

Order Forms

Selecting an order form associates this product with the selected order forms. You can adjust the order in which the product displays on the order form by editing the order form itself. The order forms need to be associated before editing pricing. This makes it possible to edit all pricing at once, since all of the possible currencies for pricing are the total set of currencies assigned to the payment groups assigned to each order form.

1. Click on the "order forms" link.
2. By default "OF 1" (Order Form 1) is in the Selectable list. If you have created more order forms, select the appropriate order form(s) from the Selectable list that you want to associate your hosting product. Remember that order forms are specific to shopping cart settings such as locale, currency, and other settings. The product will show up in the website widgets that you configure. Products can be associated with as many website widgets and order forms specific to your business. There is not a limitation on the number you can setup. Read the Add Website Widget document to learn more about website widgets.
3. Click on the "edit product order forms" button.

Cycles

Selecting a cycle allows people to order this product for the selected cycle as long as there is a price set for the order's cycle and currency. The price editor will ask for prices for all combinations of cycles and currencies. Therefore, the cycles should be set before editing pricing.

1. When the page loads, notice two new options are available. Click on the "cycles" link. Move the cycles(s) from the Selectable list on the right to the Selected list on the left. You can double-click each cycle or you can use the arrows at the bottom of each list . If a cycle is not available that you would like to use, view the Add Cycles article.
2. Click on the "edit product cycles" button.

Options (Advanced)

Pricing options allow you to offer one product in several different configurations and prices. If you need to learn more about pricing options, view the Add Pricing Options article.

1. Click on the "options" link.
2. Move the pricing option value(s) from the Selectable list on the right to the Selected list on the left. You can double-click each pricing option value or you can use the arrows at the bottom of each list .

-
3. Next, click on the "edit pricing options" button.

Prices

This page allows you to set the pricing for each cycle, as well as advanced variations in products which may affect pricing, known in the system as product variables.

1. Click on the "prices" link.
2. When the page loads, you will see a list of prices for your product and/or pricing options. Click on the "edit" icon in the Pricing column.
3. Set the following (Optional):

Tax Zone Group

Cycle Discount Group

4. Enter "General" and "Setup" prices for each cycle accordingly.
5. Click on the "edit product variant prices" button.
6. When the page loads, click on the pencil icon under the "Name" column.
7. In the Quick Edit box, enter the display name you want associated with this product's pricing and click "edit" (this name will appear on the order form and website widget).

Coupons

1. Click on the "coupons" link.
2. If you have created coupons and want to associate them with this product, double-click the coupons in the Selectable list or use the arrow buttons. Read the Add Coupons document to learn how to create and add new coupons to the system. Also, if you would like a specific coupon to be pre-applied to this new product, select the coupon name from the "Pre Applied Coupon" drop down menu.
3. Click on the "edit product coupons" button.

Upgrade/Downgrade

1. Click on the "upgrade/downgrade" link.
2. Set the following:
 May Upgrade To: Move the products(s) from the Selectable list on the right to the Selected list on the left. You can double-click each product or you can use the arrows at the bottom of each list.
 May Downgrade To: Move the product(s) from the Selectable list on the right to the Selected list on the left. You can double-click each product or you can use the arrows at the bottom of each list.
3. Click on the "save changes" button.

Usage Pricing

1. Click on the "usage pricing" link.
2. Enter the price that you are charging per usage unit. If you charge X amount per GigaByte used over Y limit, then your price would be what you would charge for each GigaByte over

that specific limit.

3. Click on the "save usage pricing" button.

Server Groups

1. Click on the "server groups" link.

2. If you have setup and configured your server groups, move the server groups from the Selectable list to the Selected list by double-clicking or using the arrows. To learn more about server groups, read the Setting Up A Server Group document.

3. Click on the "edit product server groups" button.

Attributes

To learn how to create Attributes for your products, view the Creating Product Add-Ons document.

Add-Ons

To learn how to create Add-Ons for your products, view the Creating Product Add-Ons document.

Emails

1. Click on the "emails" link.

2. Select "packageInfo - Hosting Product" from the Welcome Email drop down menu.

3. Click on the "edit product emails" button.

Notifications

1. Click on the "notifications" link.

2. Select one of the following from the "Group To Notify On Event." drop down menu:

None

admin

cronadmin

3. Click on the "save" button.

Clone Product

NOTICE!! When you click on the "clone product" link, it will automatically create an exact duplicate of the product you are currently creating/modifying. When the new page loads after you click on the "clone product" link, rename the product to your new product's name, otherwise you will have two copies of the same product.

Advanced

The advanced option is specific to the add-ons for your product. If you click on the "advanced" link in your product screen, the following new options appear in the details section:

Is Option

Addon Group

Question

Non-Hosting Product

Non-Hosting Product

Products >> Products >> Create New Product >> Non-Hosting Product

You can follow each section below in the order listed to configure your new product. Or if you need to reference any of the sections available when creating your new product, use the quick links below.

Getting Started
Order Forms
Cycles
Options
Prices
Coupons
Upgrade/Downgrade
Usage Pricing
Server Groups
Attributes
Add-Ons
Emails
Notifications
Clone Product
Advanced

Getting Started

1. Click on the Products tab.
2. Click on the "Products" link in the left main sub nav.
3. Select "Non-Hosting Product" from the "Create New Product" drop down menu, then click on the arrow to the right.
4. Once the page loads you will notice all of the links such as cycles, options, prices, etc are clickable. The system is designed to take you step-by-step through creating a product by making specific options available once the mandatory options have been completed. Leave the screen on the default product details settings and continue with Step 5 below.
5. Complete each of the settings shown:
 - Type: By default you have selected "Non-Hosting Product" as the type for this product.
 - Pricing: By default the "Regular" pricing is selected. If you require pricing options, please view the Creating Pricing Options article.
 - Name: Enter the name of your product.
 - Comments: Enter any comments you to associate with this product.
 - Billing Plan: Select the type of billing cycle you want to use for this product. Your choices are:

Forever
One Time Only
Fixed Duration

Is Active: Do you want the product to be active? Select Yes.
Is Proratable: Do you want the product to be proratable? Select Yes.
Is Discountable: Do you want the product to be discountable? Select Yes.
Associate Addon: If this is not an addon product and you would like to associate addons with this product, select from the drop down menu. Your choices are:

Optional
Required
Suppressed

Associate Domain: Select how you want domains to be associated with this product from the drop down menu. Your choices are:

Optional
Required
Suppressed

Cancellation Rules: Select from the following:

Admins can cancel (Suspend)
Admins and Clients can cancel (Suspend)
Admins can cancel (DELETE!)
Admins and Clients can cancel (DELETE!)

Date Created: This is preset by the system and cannot be modified. Product Groups: Move the product group from the Selectable list on the right to the Selected list on the left. You can double-click each product group or you can use the arrows at the bottom of each list. To learn more about Product Groups, view the Creating and Managing Product Groups article.

Product Groups: If you have created product groups and you want to associate this product with a product group, double-click the product group name from the Selectable list or use the arrow buttons. Read the Add Product Group document.

6. Once you have completed the above, click on the "save" button.

Order Forms

1. Next, click on the "order forms" link.

2. By default "OF 1" (Order Form 1) is in the Selectable list. If you have created more order forms, select the appropriate order form(s) from the Selectable list that you want to associate your hosting product. Remember that order forms are specific to "cart" settings such as locale, currency, and other settings. The product will show up in the website widgets that you configure. Products can be associated with as many website widgets and order forms specific to your business. There is not a limitation on the number you can setup. Read the Add Website Widget document to learn more about website widgets.

3. Click on the "edit product order forms" button.

Cycles

1. When the page loads, notice two new options are available. Click on the "cycles" link. Move the cycles(s) from the Selectable list on the right to the Selected list on the left. You can double-click each cycle or you can use the arrows at the bottom of each list. If a cycle is not available that you would like to use, view the Add Cycles article.

2. Click on the "edit product cycles" button.

Options

1. When the page loads, you will notice all the links are available. Click on the "options" link.
2. Move the pricing option value(s) from the Selectable list on the right to the Selected list on the left. You can double-click each pricing option value or you can use the arrows at the bottom of each list. If you need to learn more about pricing options, view the Add Pricing Options article.
3. Next, click on the "edit pricing options" button.

Prices

1. Click on the "prices" link.
2. When the page loads, you will see a list of prices for your product and/or pricing options. Click on the "edit" icon in the Pricing column.
3. Set the following:

Tax Zone Group: NEEDS MORE INFO

Cycle Discount Group: NEEDS MORE INFO

4. Enter "General" and "Setup" prices for each cycle accordingly.
5. Click on the "edit product variant prices" button.
6. When the page loads, click on the product name you are configuring in the "Variation of" column.

Coupons

1. Click on the "coupons" link.
2. If you have created coupons and want to associate them with this product, double-click the coupons in the Selectable list or use the arrow buttons. Read the Add Coupons document to learn how to create and add new coupons to the system. Also, if you would like a specific coupon to be pre-applied to this new product, select the coupon name from the "Pre Applied Coupon" drop down menu.
3. Click on the "edit product coupons" button.

Upgrade/Downgrade

1. Click on the "upgrade/downgrade" link.
2. Set the following:

May Upgrade To: Move the products(s) from the Selectable list on the right to the Selected list on the left. You can double-click each product or you can use the arrows at the bottom of each list.

May Downgrade To: Move the product(s) from the Selectable list on the right to the Selected list on the left. You can double-click each product or you can use the arrows at the bottom of each list.

3. Click on the "save changes" button.

Usage Pricing

-
1. Click on the "usage pricing" link.
 2. Enter the price that you are charging per usage unit. If you charge X amount per GigaByte used over Y limit, then your price would be what you would charge for each GigaByte over that specific limit.
 3. Click on the "save usage pricing" button.

Server Groups

1. Click on the "server groups" link.
2. If you have setup and configured your server groups, move the server groups from the Selectable list to the Selected list by double-clicking or using the arrows. To learn more about server groups, read the Setting Up A Server Group document.
3. Click on the "edit product server groups" button.

Attributes

To learn how to create Attributes for your products, view the Creating Product Add-Ons document.

Add-Ons

To learn how to create Add-Ons for your products, view the Creating Product Add-Ons document.

Emails

1. Click on the "emails" link.
2. Select "packageInfo - Hosting Product" from the Welcome Email drop down menu.
3. Click on the "edit product emails" button.

Notifications

1. Click on the "notifications" link.
2. Select one of the following from the "Group To Notify On Event." drop down menu:

None

admin

cronadmin

3. Click on the "save" button.

Clone Product

NOTICE!! When you click on the "clone product" link, it will automatically create an exact duplicate of the product you are currently creating/modifying. When the new page loads after you click on the "clone product" link, rename the product to your new product's name, otherwise you will have two copies of the same product.

Advanced

The advanced option is specific to the add-ons for your product. If you click on the "advanced" link in your product screen, the following new options appear in the details section:

Is Option

Addon Group

Question

Domain Registration Product

Domain Registration Product

Products >> Products >> Create New Product >> Domain Registration Product

You can follow each section below in the order listed to configure your new product. Or if you need to reference any of the sections available when creating your new product, use the quick links below.

Getting Started
Order Forms
Cycles
tlds
Prices
Coupons
Upgrade/Downgrade
Usage Pricing
Server Groups
Attributes
Add-Ons
Emails
Notifications
Clone Product
Advanced
 Getting Started

1. Click on the Products tab.
2. Click on the "Products" link in the left main sub nav.
3. Select "Domain Registration Product" from the "Create New Product" drop down menu, then click on the arrow to the right.
4. Once the page loads you will notice most of the links such as cycles, options, prices, etc are not clickable. The system is designed to take you step-by-step through creating a product by making specific options available once the mandatory options have been completed. Leave the screen on the default product details settings and continue with Step 5 below.
5. Complete each of the settings shown:
 Type: By default you have selected "Domain Registration Product" as the type for this product.

Pricing: By default the "Regular" pricing is selected. If you require pricing options, please view the [Creating Pricing Options](#) article.

Name: Enter the name of your product.

Comments: Enter any comments you to associate with this product.

Billing Plan: Select the type of billing cycle you want to use for this product. Your choices are:

- Forever
- One Time Only
- Fixed Duration

Is Active: Do you want the product to be active? Select Yes.

Is Proratable: Do you want the product to be proratable? Select Yes.

Is Discountable: Do you want the product to be discountable? Select Yes.

Associate Addon: If this is not an addon product and you would like to associate addons with this product, select from the drop down menu. Your choices are:

- Optional
- Required
- Suppressed

Associate Domain: Select how you want domains to be associated with this product from the drop down menu. Your choices are:

- Optional
- Required
- Suppressed

Cancellation Rules: Select from the following:

- Admins can cancel (Suspend)
- Admins and Clients can cancel (Suspend)
- Admins can cancel (DELETE!)
- Admins and Clients can cancel (DELETE!)

Date Created: This is preset by the system and cannot be modified. Product Groups: Move the product group from the Selectable list on the right to the Selected list on the left. You can double-click each product group or you can use the arrows at the bottom of each list. To learn more about Product Groups, view the [Creating and Managing Product Groups](#) article.

Product Groups: If you have created product groups and you want to associate this product with a product group, double-click the product group name from the Selectable list or use the arrow buttons. Read the [Add Product Group](#) document.

6. Once you have completed the above, click on the "save" button.

Order Forms

1. Next, click on the "order forms" link.

2. By default "OF 1" (Order Form 1) is in the Selectable list. If you have created more order forms, select the appropriate order form(s) from the Selectable list that you want to associate your hosting product. Remember that order forms are specific to "cart" settings such as locale, currency, and other settings. The product will show up in the website widgets that you configure. Products can be associated with as many website widgets and order forms specific to your business. There is not a limitation on the number you can setup. Read the [Add Website Widget](#) document to learn more about website widgets.

3. Click on the "edit product order forms" button.

Cycles

1. When the page loads, notice two new options are available. Click on the "cycles" link. Move the cycles(s) from the Selectable list on the right to the Selected list on the left. You can double-click each cycle or you can use the arrows at the bottom of each list. If a cycle is not available that you would like to use, view the Add Cycles article.

2. Click on the "edit product cycles" button.

tlds

1. Click on the "tlds" link.

2. Move the tld value(s) from the Selectable list on the right to the Selected list on the left. You can double-click each tld value or you can use the arrows at the bottom of each list.

3. Next, click on the "edit product tlds" button.

Prices

1. Click on the "prices" link.

2. When the page loads, you will see a list of prices for your product and/or pricing options. Click on the "edit" icon in the Pricing column.

3. Set the following:

Tax Zone Group: NEEDS MORE INFO

Cycle Discount Group: NEEDS MORE INFO

4. Enter "General" and "Setup" prices for each cycle accordingly.

5. Click on the "edit product variant prices" button.

6. When the page loads, click on the product name you are configuring in the "Variation of" column.

Coupons

1. Click on the "coupons" link.

2. If you have created coupons and want to associate them with this product, double-click the coupons in the Selectable list or use the arrow buttons. Read the Add Coupons document to learn how to create and add new coupons to the system. Also, if you would like a specific coupon to be pre-applied to this new product, select the coupon name from the "Pre Applied Coupon" drop down menu.

3. Click on the "edit product coupons" button.

Upgrade/Downgrade

1. Click on the "upgrade/downgrade" link.

2. Set the following:

May Upgrade To: Move the products(s) from the Selectable list on the right to the Selected list on the left. You can double-click each product or you can use the arrows at the bottom of each list.

May Downgrade To: Move the product(s) from the Selectable list on the right to the Selected list on the left. You can double-click each product or you can use the arrows at the bottom of each list.

3. Click on the "save changes" button.

Usage Pricing

1. Click on the "usage pricing" link.

2. Enter the price that you are charging per usage unit. If you charge X amount per GigaByte used over Y limit, then your price would be what you would charge for each GigaByte over that specific limit.

3. Click on the "save usage pricing" button.

Server Groups

1. Click on the "server groups" link.

2. If you have setup and configured your server groups, move the server groups from the Selectable list to the Selected list by double-clicking or using the arrows. To learn more about server groups, read the Setting Up A Server Group document.

3. Click on the "edit product server groups" button.

Attributes

To learn how to create Attributes for your products, view the Creating Product Add-Ons document.

Add-Ons

To learn how to create Add-Ons for your products, view the Creating Product Add-Ons document.

Emails

1. Click on the "emails" link.

2. Select "packageInfo - Hosting Product" from the Welcome Email drop down menu.

3. Click on the "edit product emails" button.

Notifications

1. Click on the "notifications" link.

2. Select one of the following from the "Group To Notify On Event." drop down menu:

None

admin

cronadmin

3. Click on the "save" button.

Clone Product

NOTICE!! When you click on the "clone product" link, it will automatically create an exact

duplicate of the product you are currently creating/modifying. When the new page loads after you click on the "clone product" link, rename the product to your new product's name, otherwise you will have two copies of the same product.

Advanced

The advanced option is specific to the add-ons for your product. If you click on the "advanced" link in your product screen, the following new options appear in the details section:

Is Option

Addon Group

Question

Adding ID Protect as an Add-on for Domains

ID Protect can now be offered as add-on for domains. Please note that provisioning this add-on will only work if you are using a registrar that supports this feature (for example, eNom).

Part 1. Create the Custom Question “ID Protect”

1. Navigate to System > Order Settings > Custom Attributes.
2. When the page loads, click on the “New Generic Attribute” button.
3. Set the following accordingly:

Setup Internal Values:

Generic Attribute Key: Type idProtect
Generic Question Name: Type ID Protect

Setup Display Values:

Default Question: Type Do you want ID Protect?
Default Answer Value: Type yes.
Question Description: Type ID Protect option.

4. Click on the "save" button.

Part 2. Add the ID Protect option to the Domain Product.

1. Navigate to Products > Domain Registration Product > Details
2. In the field labeled Addon Option, select “Optional” from the dropdown. Click “save”.
3. Click the “+ advanced” link from the submenu to display advanced settings.
 4. Click the “attributes” link from the submenu.
5. Click “save changes”.

6. Click the “add-ons” link from the submenu.
7. When the page loads, click “Create New Addons For This Product”.
8. Set the following accordingly:

Addon Step 1:

Panel Attribute to Change: Select “Do you want ID Protect?”.
Addon HTML Display Type: Select “Checkboxes”.
Addon Display Label: Type Domain Options or Domain Features.

9. Click “next”.
10. Set the following accordingly:

Addon Step 2:

Option Display Name: Type ID Protect.
Option Internal Value(s): Type yes.
Question Description: Type ID Protect option.

11. Click “next”.
12. Set prices for the ID Protect option and click “next”.
13. Click “finish”.
14. The ID Protect option will now be available on your order form.

SSL Certificate Product

SSL Certificate Product

Products >> Products >> Create New Product >> SSL Certificate Product
Things To Know

If you are offering four types of SSL Certificates, you will need to create a different product for each type of certificate. For example, you want to sell the following SSL Certificates:

Quick SSL
Rapid SSL
True Biz ID
Quick SSL Premium

Each of the above certificates would be a separate product. In order for each product to be provisioned correctly, an attribute must be associated with the SSL Certificate in reference. To learn how to associate SSL Certificate attributes, read the Attributes section below.

You can follow each section below in the order listed to configure your new product. Or if you need to reference any of the sections available when creating your new product, use the quick links below.

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Getting Started

1. Click on the Products tab.
2. Click on the "Products" link in the left main sub nav.
3. Select "SSL Certificate Product" from the "Create New Product" drop down menu, then click on the arrow to the right.
4. Once the page loads you will notice most of the links such as cycles, options, prices, etc are not clickable. The system is designed to take you step-by-step through creating a product by making specific options available once the mandatory options have been completed. Leave the screen on the default product details settings and continue with Step 5 below.
5. Complete each of the settings shown:
 - Type: By default you have selected "SSL Certificate Product" as the type for this product.
 - Pricing: By default the "Regular" pricing is selected. If you require pricing options, please view the Creating Pricing Options article.
 - Name: Enter the name of your product.
 - Comments: Enter any comments you to associate with this product.
 - Billing Plan: Select the type of billing cycle you want to use for this product. Your choices are:

- Forever
- One Time Only
- Fixed Duration

Is Active: Do you want the product to be active? Select Yes.

Is Proratable: Do you want the product to be proratable? Select Yes.

Is Discountable: Do you want the product to be discountable? Select Yes.

Associate Addon: If this is not an addon product and you would like to associate addons with this product, select from the drop down menu. Your choices are:

- Optional
- Required
- Suppressed

Associate Domain: Select how you want domains to be associated with this product from the drop down menu. Your choices are:

- Optional
- Required
- Suppressed

Cancellation Rules: Select from the following:

- Admins can cancel (Suspend)
- Admins and Clients can cancel (Suspend)
- Admins can cancel (DELETE!)
- Admins and Clients can cancel (DELETE!)

Date Created: This is preset by the system and cannot be modified. Product Groups: Move the product group from the Selectable list on the right to the Selected list on the left. You can double-click each product group or you can use the arrows at the bottom of each list . To learn more about Product Groups, view the Creating and Managing Product Groups article.

Product Groups: If you have created product groups and you want to associate this product with a product group, double-click the product group name from the Selectable list or use the arrow buttons. Read the Add Product Group document.

6. Once you have completed the above, click on the "save" button.

Order Forms

1. Next, click on the "order forms" link.

2. By default "OF 1" (Order Form 1) is in the Selectable list. If you have created more order forms, select the appropriate order form(s) from the Selectable list that you want to associate your hosting product. Remember that order forms are specific to "cart" settings such as locale, currency, and other settings. The product will show up in the website widgets that you configure. Products can be associated with as many website widgets and order forms specific to your business. There is not a limitation on the number you can setup. Read the Add Website Widget document to learn more about website widgets.

3. Click on the "edit product order forms" button.

Cycles

1. When the page loads, notice two new options are available. Click on the "cycles" link. Move the cycles(s) from the Selectable list on the right to the Selected list on the left. You can double-click each cycle or you can use the arrows at the bottom of each list . If a cycle is not available that you would like to use, view the Add Cycles article.

2. Click on the "edit product cycles" button.

Options

1. When the page loads, you will notice all the links are available. Click on the "options" link.

2. Move the pricing option value(s) from the Selectable list on the right to the Selected list on the left. You can double-click each pricing option value or you can use the arrows at the bottom of each list . If you need to learn more about pricing options, view the Add Pricing Options article.

3. Next, click on the "edit pricing options" button.

Prices

1. Click on the "prices" link.

2. When the page loads, you will see a list of prices for your product and/or pricing options. Click on the "edit" icon in the Pricing column.

3. Set the following:

Tax Zone Group: NEEDS MORE INFO

Cycle Discount Group: NEEDS MORE INFO

-
4. Enter "General" and "Setup" prices for each cycle accordingly.
 5. Click on the "edit product variant prices" button.
 6. When the page loads, click on the product name you are configuring in the "Variation of" column.

Coupons

1. Click on the "coupons" link.
2. If you have created coupons and want to associate them with this product, double-click the coupons in the Selectable list or use the arrow buttons. Read the Add Coupons document to learn how to create and add new coupons to the system. Also, if you would like a specific coupon to be pre-applied to this new product, select the coupon name from the "Pre Applied Coupon" drop down menu.
3. Click on the "edit product coupons" button.

Upgrade/Downgrade

1. Click on the "upgrade/downgrade" link.
2. Set the following:

May Upgrade To: Move the products(s) from the Selectable list on the right to the Selected list on the left. You can double-click each product or you can use the arrows at the bottom of each list.

May Downgrade To: Move the product(s) from the Selectable list on the right to the Selected list on the left. You can double-click each product or you can use the arrows at the bottom of each list.

3. Click on the "save changes" button.

Usage Pricing

1. Click on the "usage pricing" link.
2. Enter the price that you are charging per usage unit. If you charge X amount per GigaByte used over Y limit, then your price would be what you would charge for each GigaByte over that specific limit.
3. Click on the "save usage pricing" button.

Server Groups

1. Click on the "server groups" link.
2. If you have setup and configured your server groups, move the server groups from the Selectable list to the Selected list by double-clicking or using the arrows. To learn more about server groups, read the Setting Up A Server Group document.
3. Click on the "edit product server groups" button.

Attributes

If the "attributes" link is not clickable, click on the "+ advanced" link. Then follow the instructions below:

1. Click on the "attributes" link.
2. When the page loads, click on the "pencil" icon next to "New" in the Generic Attributes section.

3. A box will appear. Type in "certProductType" without quotes and click on the "Add" button.

4. After you click on the "Add" button, the "certTypeProduct" attribute will show up in the Generic Attributes list. Click on the "pencil" icon in the Actions column.

5. Enter one of the following attributes depending on which SSL Certificate Product you are creating as defined below:

Product
Attribute

Quick SSL
QuickSSL

Rapid SSL
RapidSSL

True Biz ID
TrueBizID

Quick SSL Premium
QuickSSLPremium

An example is shown below:

Make sure you set your order forms, cycles (1, 2, 3, 4, 5 yr or how many cycles in years you want to offer your customers).

Add-Ons

To learn how to create Add-Ons for your products, view the [Creating Product Add-Ons](#) document.

Emails

1. Click on the "emails" link.
2. Select "packageInfo - Hosting Product" from the Welcome Email drop down menu.
3. Click on the "edit product emails" button.

Notifications

1. Click on the "notifications" link.
2. Select one of the following from the "Group To Notify On Event." drop down menu:

None

admin

cronadmin

3. Click on the "save" button.

Clone Product

NOTICE!! When you click on the "clone product" link, it will automatically create an exact duplicate of the product you are currently creating/modifying. When the new page loads after you click on the "clone product" link, rename the product to your new product's name, otherwise you will have two copies of the same product.

Advanced

The advanced option is specific to the add-ons for your product. If you click on the "advanced" link in your product screen, the following new options appear in the details section:

Is Option

Addon Group

Question

License Product

License Product

Products >> Products >> Create New Product >> License Product

You can follow each section below in the order listed to configure your new product. Or if you need to reference any of the sections available when creating your new product, use the quick links below.

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 Getting Started

1. Click on the Products tab.
2. Click on the "Products" link in the left main sub nav.
3. Select "License Product" from the "Create New Product" drop down menu, then click on the arrow to the right.
4. Once the page loads you will notice all of the links such as cycles, options, prices, etc are clickable. The system is designed to take you step-by-step through creating a product by making specific options available once the mandatory options have been completed. Leave the screen on the default product details settings and continue with Step 5 below.
5. Complete each of the settings shown:
 - Type: By default you have selected "License Product" as the type for this product.
 - Pricing: By default the "Regular" pricing is selected. If you require pricing options, please view the Creating Pricing Options article.
 - Name: Enter the name of your product.
 - Comments: Enter any comments you to associate with this product.
 - Billing Plan: Select the type of billing cycle you want to use for this product. Your choices are:

- Forever
- One Time Only
- Fixed Duration

- Is Active: Do you want the product to be active? Select Yes.
- Is Proratable: Do you want the product to be proratable? Select Yes.
- Is Discountable: Do you want the product to be discountable? Select Yes.
- Associate Addon: If this is not an addon product and you would like to associate addons with this product, select from the drop down menu. Your choices are:

- Optional
- Required
- Suppressed

Associate Domain: Select how you want domains to be associated with this product from the drop down menu. Your choices are:

- Optional
- Required
- Suppressed

Cancellation Rules: Select from the following:

- Admins can cancel (Suspend)
- Admins and Clients can cancel (Suspend)
- Admins can cancel (DELETE!)
- Admins and Clients can cancel (DELETE!)

Date Created: This is preset by the system and cannot be modified. Product Groups: Move the product group from the Selectable list on the right to the Selected list on the left.

You can double-click each product group or you can use the arrows at the bottom of each list . To learn more about Product Groups, view the [Creating and Managing Product Groups](#) article.

Product Groups: If you have created product groups and you want to associate this product with a product group, double-click the product group name from the Selectable list or use the arrow buttons. Read the [Add Product Group](#) document.

6. Once you have completed the above, click on the "save" button.

Order Forms

1. Next, click on the "order forms" link.

2. By default "OF 1" (Order Form 1) is in the Selectable list. If you have created more order forms, select the appropriate order form(s) from the Selectable list that you want to associate your hosting product. Remember that order forms are specific to "cart" settings such as locale, currency, and other settings. The product will show up in the website widgets that you configure. Products can be associated with as many website widgets and order forms specific to your business. There is not a limitation on the number you can setup. Read the [Add Website Widget](#) document to learn more about website widgets.

3. Click on the "edit product order forms" button.

Cycles

1. When the page loads, notice two new options are available. Click on the "cycles" link. Move the cycles(s) from the Selectable list on the right to the Selected list on the left. You can double-click each cycle or you can use the arrows at the bottom of each list . If a cycle is not available that you would like to use, view the [Add Cycles](#) article.

2. Click on the "edit product cycles" button.

Options

1. When the page loads, you will notice all the links are available. Click on the "options" link.

2. Move the pricing option value(s) from the Selectable list on the right to the Selected list on the left. You can double-click each pricing option value or you can use the arrows at the bottom of each list . If you need to learn more about pricing options, view the [Add Pricing Options](#) article.

3. Next, click on the "edit pricing options" button.

Prices

1. Click on the "prices" link.

2. When the page loads, you will see a list of prices for your product and/or pricing options. Click on the "edit" icon in the Pricing column.

3. Set the following:

Tax Zone Group: NEEDS MORE INFO

Cycle Discount Group: NEEDS MORE INFO

4. Enter "General" and "Setup" prices for each cycle accordingly.

5. Click on the "edit product variant prices" button.

6. When the page loads, click on the product name you are configuring in the "Variation of" column.

Coupons

1. Click on the "coupons" link.
2. If you have created coupons and want to associate them with this product, double-click the coupons in the Selectable list or use the arrow buttons. Read the Add Coupons document to learn how to create and add new coupons to the system. Also, if you would like a specific coupon to be pre-applied to this new product, select the coupon name from the "Pre Applied Coupon" drop down menu.
3. Click on the "edit product coupons" button.

Upgrade/Downgrade

1. Click on the "upgrade/downgrade" link.
2. Set the following:

May Upgrade To: Move the products(s) from the Selectable list on the right to the Selected list on the left. You can double-click each product or you can use the arrows at the bottom of each list.

May Downgrade To: Move the product(s) from the Selectable list on the right to the Selected list on the left. You can double-click each product or you can use the arrows at the bottom of each list.

3. Click on the "save changes" button.

Usage Pricing

1. Click on the "usage pricing" link.
2. Enter the price that you are charging per usage unit. If you charge X amount per GigaByte used over Y limit, then your price would be what you would charge for each GigaByte over that specific limit.
3. Click on the "save usage pricing" button.

Server Groups

1. Click on the "server groups" link.
2. If you have setup and configured your server groups, move the server groups from the Selectable list to the Selected list by double-clicking or using the arrows. To learn more about server groups, read the Setting Up A Server Group document.
3. Click on the "edit product server groups" button.

Attributes

To learn how to create Attributes for your products, view the Creating Product Add-Ons document.

Add-Ons

To learn how to create Add-Ons for your products, view the Creating Product Add-Ons document.

Emails

1. Click on the "emails" link.

-
2. Select "packageInfo - Hosting Product" from the Welcome Email drop down menu.
 3. Click on the "edit product emails" button.

Notifications

1. Click on the "notifications" link.
2. Select one of the following from the "Group To Notify On Event." drop down menu:

None

admin

cronadmin

3. Click on the "save" button.

Clone Product

NOTICE!! When you click on the "clone product" link, it will automatically create an exact duplicate of the product you are currently creating/modifying. When the new page loads after you click on the "clone product" link, rename the product to your new product's name, otherwise you will have two copies of the same product.

Advanced

The advanced option is specific to the add-ons for your product. If you click on the "advanced" link in your product screen, the following new options appear in the details section:

Is Option

Addon Group

Question

Software Product

Software Product

Products >> Products >> Create New Product >> Software Product

You can follow each section below in the order listed to configure your new product. Or if you need to reference any of the sections available when creating your new product, use the quick links below.

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Getting Started

1. Click on the Products tab.
2. Click on the "Products" link in the left main sub nav.
3. Select "Software Product" from the "Create New Product" drop down menu, then click on the arrow to the right.
4. Once the page loads you will notice most of the links such as cycles, options, prices, etc are not clickable. The system is designed to take you step-by-step through creating a product by making specific options available once the mandatory options have been completed. Leave the screen on the default product details settings and continue with Step 5 below.
5. Complete each of the settings shown:
 - Type: By default you have selected "Software Product" as the type for this product.
 - Pricing: By default the "Regular" pricing is selected. If you require pricing options, please view the [Creating Pricing Options](#) article.
 - Name: Enter the name of your product.
 - Comments: Enter any comments you to associate with this product.
 - Billing Plan: Select the type of billing cycle you want to use for this product. Your choices are:

Forever
One Time Only
Fixed Duration

- Is Active: Do you want the product to be active? Select Yes.
- Is Proratable: Do you want the product to be proratable? Select Yes.
- Is Discountable: Do you want the product to be discountable? Select Yes.
- Associate Addon: If this is not an addon product and you would like to associate addons with this product, select from the drop down menu. Your choices are:

Optional
Required
Suppressed

Associate Domain: Select how you want domains to be associated with this product from the drop down menu. Your choices are:

Optional
Required
Suppressed

Cancellation Rules: Select from the following:

Admins can cancel (Suspend)
Admins and Clients can cancel (Suspend)
Admins can cancel (DELETE!)
Admins and Clients can cancel (DELETE!)

Date Created: This is preset by the system and cannot be modified. Product Groups: Move the product group from the Selectable list on the right to the Selected list on the left. You can double-click each product group or you can use the arrows at the bottom of each list . To learn more about Product Groups, view the Creating and Managing Product Groups article.

Product Groups: If you have created product groups and you want to associate this product with a product group, double-click the product group name from the Selectable list or use the arrow buttons. Read the Add Product Group document.

6. Once you have completed the above, click on the "save" button.

Order Forms

1. Next, click on the "order forms" link.

2. By default "OF 1" (Order Form 1) is in the Selectable list. If you have created more order forms, select the appropriate order form(s) from the Selectable list that you want to associate your hosting product. Remember that order forms are specific to "cart" settings such as locale, currency, and other settings. The product will show up in the website widgets that you configure. Products can be associated with as many website widgets and order forms specific to your business. There is not a limitation on the number you can setup. Read the Add Website Widget document to learn more about website widgets.

3. Click on the "edit product order forms" button.

Cycles

1. When the page loads, notice two new options are available. Click on the "cycles" link. Move the cycles(s) from the Selectable list on the right to the Selected list on the left. You can double-click each cycle or you can use the arrows at the bottom of each list . If a cycle is not available that you would like to use, view the Add Cycles article.

2. Click on the "edit product cycles" button.

Options

1. When the page loads, you will notice all the links are available. Click on the "options" link.

2. Move the pricing option value(s) from the Selectable list on the right to the Selected list on the left. You can double-click each pricing option value or you can use the arrows at the bottom of each list . If you need to learn more about pricing options, view the Add Pricing Options article.

3. Next, click on the "edit pricing options" button.

Prices

1. Click on the "prices" link.

2. When the page loads, you will see a list of prices for your product and/or pricing options. Click on the "edit" icon in the Pricing column.

3. Set the following:

Tax Zone Group: NEEDS MORE INFO

Cycle Discount Group: NEEDS MORE INFO

4. Enter "General" and "Setup" prices for each cycle accordingly.
5. Click on the "edit product variant prices" button.
6. When the page loads, click on the product name you are configuring in the "Variation of" column.

Coupons

1. Click on the "coupons" link.
2. If you have created coupons and want to associate them with this product, double-click the coupons in the Selectable list or use the arrow buttons. Read the Add Coupons document to learn how to create and add new coupons to the system. Also, if you would like a specific coupon to be pre-applied to this new product, select the coupon name from the "Pre Applied Coupon" drop down menu.
3. Click on the "edit product coupons" button.

Upgrade/Downgrade

1. Click on the "upgrade/downgrade" link.
2. Set the following:

May Upgrade To: Move the products(s) from the Selectable list on the right to the Selected list on the left. You can double-click each product or you can use the arrows at the bottom of each list.

May Downgrade To: Move the product(s) from the Selectable list on the right to the Selected list on the left. You can double-click each product or you can use the arrows at the bottom of each list.

3. Click on the "save changes" button.

Usage Pricing

1. Click on the "usage pricing" link.
2. Enter the price that you are charging per usage unit. If you charge X amount per GigaByte used over Y limit, then your price would be what you would charge for each GigaByte over that specific limit.
3. Click on the "save usage pricing" button.

Server Groups

1. Click on the "server groups" link.
2. If you have setup and configured your server groups, move the server groups from the Selectable list to the Selected list by double-clicking or using the arrows. To learn more about server groups, read the Setting Up A Server Group document.
3. Click on the "edit product server groups" button.

Attributes

To learn how to create Attributes for your products, view the Creating Product Add-Ons document.

Add-Ons

To learn how to create Add-Ons for your products, view the [Creating Product Add-Ons](#) document.

Emails

1. Click on the "emails" link.
2. Select "packageInfo - Hosting Product" from the Welcome Email drop down menu.
3. Click on the "edit product emails" button.

Notifications

1. Click on the "notifications" link.
2. Select one of the following from the "Group To Notify On Event." drop down menu:

None

admin

cronadmin

3. Click on the "save" button.

Clone Product

NOTICE!! When you click on the "clone product" link, it will automatically create an exact duplicate of the product you are currently creating/modifying. When the new page loads after you click on the "clone product" link, rename the product to your new product's name, otherwise you will have two copies of the same product.

Advanced

The advanced option is specific to the add-ons for your product. If you click on the "advanced" link in your product screen, the following new options appear in the details section:

Is Option

Addon Group

Question

Usage Product

Usage Product

Products >> Products >> Create New Product >> Usage Product

You can follow each section below in the order listed to configure your new product. Or if you need to reference any of the sections available when creating your new product, use the quick links below.

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 Getting Started

1. Click on the Products tab.
 2. Click on the "Products" link in the left main sub nav.
 3. Select "Usage Product" from the "Create New Product" drop down menu, then click on the arrow to the right.
 4. Once the page loads you will notice all of the links such as cycles, options, prices, etc are clickable. The system is designed to take you step-by-step through creating a product by making specific options available once the mandatory options have been completed. Leave the screen on the default product details settings and continue with Step 5 below.
 5. Complete each of the settings shown:
 - Type: By default you have selected "Usage Product" as the type for this product.
 - Pricing: By default the "Regular" pricing is selected. If you require pricing options, please view the [Creating Pricing Options](#) article.
 - Name: Enter the name of your product.
 - Comments: Enter any comments you to associate with this product.
 - Billing Plan: Select the type of billing cycle you want to use for this product. Your choices are:
 - Forever
 - One Time Only
 - Fixed Duration
- Is Active: Do you want the product to be active? Select Yes.
Is Proratable: Do you want the product to be proratable? Select Yes.
Is Discountable: Do you want the product to be discountable? Select Yes.
Associate Addon: If this is not an addon product and you would like to associate addons with this product, select from the drop down menu. Your choices are:

Optional

Required
Suppressed

Associate Domain: Select how you want domains to be associated with this product from the drop down menu. Your choices are:

Optional
Required
Suppressed

Cancellation Rules: Select from the following:

Admins can cancel (Suspend)
Admins and Clients can cancel (Suspend)
Admins can cancel (DELETE!)
Admins and Clients can cancel (DELETE!)

Date Created: This is preset by the system and cannot be modified. Product Groups: Move the product group from the Selectable list on the right to the Selected list on the left. You can double-click each product group or you can use the arrows at the bottom of each list . To learn more about Product Groups, view the Creating and Managing Product Groups article.

Product Groups: If you have created product groups and you want to associate this product with a product group, double-click the product group name from the Selectable list or use the arrow buttons. Read the Add Product Group document.

6. Once you have completed the above, click on the "save" button.

Order Forms

1. Next, click on the "order forms" link.

2. By default "OF 1" (Order Form 1) is in the Selectable list. If you have created more order forms, select the appropriate order form(s) from the Selectable list that you want to associate your hosting product. Remember that order forms are specific to "cart" settings such as locale, currency, and other settings. The product will show up in the website widgets that you configure. Products can be associated with as many website widgets and order forms specific to your business. There is not a limitation on the number you can setup. Read the Add Website Widget document to learn more about website widgets.

3. Click on the "edit product order forms" button.

Cycles

1. When the page loads, notice two new options are available. Click on the "cycles" link. Move the cycles(s) from the Selectable list on the right to the Selected list on the left. You can double-click each cycle or you can use the arrows at the bottom of each list . If a cycle is not available that you would like to use, view the Add Cycles article.

2. Click on the "edit product cycles" button.

Options

1. When the page loads, you will notice all the links are available. Click on the "options" link.

2. Move the pricing option value(s) from the Selectable list on the right to the Selected list on the left. You can double-click each pricing option value or you can use the arrows at the bottom of each list . If you need to learn more about pricing options, view the Add Pricing Options article.

3. Next, click on the "edit pricing options" button.

Prices

1. Click on the "prices" link.
2. When the page loads, you will see a list of prices for your product and/or pricing options. Click on the "edit" icon in the Pricing column.
3. Set the following:

Tax Zone Group: NEEDS MORE INFO

Cycle Discount Group: NEEDS MORE INFO

4. Enter "General" and "Setup" prices for each cycle accordingly.
5. Click on the "edit product variant prices" button.
6. When the page loads, click on the product name you are configuring in the "Variation of" column.

Coupons

1. Click on the "coupons" link.
2. If you have created coupons and want to associate them with this product, double-click the coupons in the Selectable list or use the arrow buttons. Read the Add Coupons document to learn how to create and add new coupons to the system. Also, if you would like a specific coupon to be pre-applied to this new product, select the coupon name from the "Pre Applied Coupon" drop down menu.
3. Click on the "edit product coupons" button.

Upgrade/Downgrade

1. Click on the "upgrade/downgrade" link.
2. Set the following:

May Upgrade To: Move the products(s) from the Selectable list on the right to the Selected list on the left. You can double-click each product or you can use the arrows at the bottom of each list.

May Downgrade To: Move the product(s) from the Selectable list on the right to the Selected list on the left. You can double-click each product or you can use the arrows at the bottom of each list.

3. Click on the "save changes" button.

Usage Pricing

1. Click on the "usage pricing" link.
2. Enter the price that you are charging per usage unit. If you charge X amount per GigaByte used over Y limit, then your price would be what you would charge for each GigaByte over that specific limit.
3. Click on the "save usage pricing" button.

Server Groups

1. Click on the "server groups" link.
2. If you have setup and configured your server groups, move the server groups from the Selectable list to the Selected list by double-clicking or using the arrows. To learn more about server groups, read the Setting Up A Server Group document.
3. Click on the "edit product server groups" button.

Attributes

To learn how to create Attributes for your products, view the Creating Product Add-Ons document.

Add-Ons

To learn how to create Add-Ons for your products, view the Creating Product Add-Ons document.

Emails

1. Click on the "emails" link.
2. Select "packageInfo - Hosting Product" from the Welcome Email drop down menu.
3. Click on the "edit product emails" button.

Notifications

1. Click on the "notifications" link.
2. Select one of the following from the "Group To Notify On Event." drop down menu:

None

admin

cronadmin

3. Click on the "save" button.

Clone Product

NOTICE!! When you click on the "clone product" link, it will automatically create an exact duplicate of the product you are currently creating/modifying. When the new page loads after you click on the "clone product" link, rename the product to your new product's name, otherwise you will have two copies of the same product.

Advanced

The advanced option is specific to the add-ons for your product. If you click on the "advanced" link in your product screen, the following new options appear in the details section:

Is Option

Addon Group

Question

Contract Product

Contract Product

Products >> Products >> Create New Product >> Contract Product

You can follow each section below in the order listed to configure your new product. Or if you need to reference any of the sections available when creating your new product, use the quick links below.

Getting Started
Order Forms
Cycles
Options
Prices
Coupons
Upgrade/Downgrade
Usage Pricing
Server Groups
Attributes
Add-Ons
Emails
Notifications
Clone Product
Advanced

Getting Started

1. Click on the Products tab.
2. Click on the "Products" link in the left main sub nav.
3. Select "Contract Product" from the "Create New Product" drop down menu, then click on the arrow to the right.
4. Once the page loads you will notice all of the links such as cycles, options, prices, etc are clickable. The system is designed to take you step-by-step through creating a product by making specific options available once the mandatory options have been completed. Leave the screen on the default product details settings and continue with Step 5 below.
5. Complete each of the settings shown:
 - Type: By default you have selected "Contract Product" as the type for this product.
 - Pricing: By default the "Regular" pricing is selected. If you require pricing options, please view the Creating Pricing Options article.
 - Name: Enter the name of your product.
 - Comments: Enter any comments you to associate with this product.
 - Billing Plan: Select the type of billing cycle you want to use for this product. Your choices are:

Forever
One Time Only
Fixed Duration

Is Active: Do you want the product to be active? Select Yes.
Is Proratable: Do you want the product to be proratable? Select Yes.
Is Discountable: Do you want the product to be discountable? Select Yes.
Associate Addon: If this is not an addon product and you would like to associate addons with this product, select from the drop down menu. Your choices are:

Optional
Required
Suppressed

Associate Domain: Select how you want domains to be associated with this product from the drop down menu. Your choices are:

Optional
Required
Suppressed

Cancellation Rules: Select from the following:

Admins can cancel (Suspend)
Admins and Clients can cancel (Suspend)
Admins can cancel (DELETE!)
Admins and Clients can cancel (DELETE!)

Date Created: This is preset by the system and cannot be modified. Product Groups: Move the product group from the Selectable list on the right to the Selected list on the left. You can double-click each product group or you can use the arrows at the bottom of each list . To learn more about Product Groups, view the Creating and Managing Product Groups article.

Product Groups: If you have created product groups and you want to associate this product with a product group, double-click the product group name from the Selectable list or use the arrow buttons. Read the Add Product Group document.

6. Once you have completed the above, click on the "save" button.

Order Forms

1. Next, click on the "order forms" link.

2. By default "OF 1" (Order Form 1) is in the Selectable list. If you have created more order forms, select the appropriate order form(s) from the Selectable list that you want to associate your hosting product. Remember that order forms are specific to "cart" settings such as locale, currency, and other settings. The product will show up in the website widgets that you configure. Products can be associated with as many website widgets and order forms specific to your business. There is not a limitation on the number you can setup. Read the Add Website Widget document to learn more about website widgets.

3. Click on the "edit product order forms" button.

Cycles

1. When the page loads, notice two new options are available. Click on the "cycles" link. Move the cycles(s) from the Selectable list on the right to the Selected list on the left. You can double-click each cycle or you can use the arrows at the bottom of each list . If a cycle is not available that you would like to use, view the Add Cycles article.

2. Click on the "edit product cycles" button.

Options

1. When the page loads, you will notice all the links are available. Click on the "options" link.

2. Move the pricing option value(s) from the Selectable list on the right to the Selected list on the left. You can double-click each pricing option value or you can use the arrows at the bottom of each list. If you need to learn more about pricing options, view the Add Pricing Options article.

3. Next, click on the "edit pricing options" button.

Prices

1. Click on the "prices" link.

2. When the page loads, you will see a list of prices for your product and/or pricing options. Click on the "edit" icon in the Pricing column.

3. Set the following:

Tax Zone Group: NEEDS MORE INFO

Cycle Discount Group: NEEDS MORE INFO

4. Enter "General" and "Setup" prices for each cycle accordingly.

5. Click on the "edit product variant prices" button.

6. When the page loads, click on the product name you are configuring in the "Variation of" column.

Coupons

1. Click on the "coupons" link.

2. If you have created coupons and want to associate them with this product, double-click the coupons in the Selectable list or use the arrow buttons. Read the Add Coupons document to learn how to create and add new coupons to the system. Also, if you would like a specific coupon to be pre-applied to this new product, select the coupon name from the "Pre Applied Coupon" drop down menu.

3. Click on the "edit product coupons" button.

Upgrade/Downgrade

1. Click on the "upgrade/downgrade" link.

2. Set the following:

May Upgrade To: Move the products(s) from the Selectable list on the right to the Selected list on the left. You can double-click each product or you can use the arrows at the bottom of each list.

May Downgrade To: Move the product(s) from the Selectable list on the right to the Selected list on the left. You can double-click each product or you can use the arrows at the bottom of each list.

3. Click on the "save changes" button.

Usage Pricing

-
1. Click on the "usage pricing" link.
 2. Enter the price that you are charging per usage unit. If you charge X amount per GigaByte used over Y limit, then your price would be what you would charge for each GigaByte over that specific limit.
 3. Click on the "save usage pricing" button.

Server Groups

1. Click on the "server groups" link.
2. If you have setup and configured your server groups, move the server groups from the Selectable list to the Selected list by double-clicking or using the arrows. To learn more about server groups, read the Setting Up A Server Group document.
3. Click on the "edit product server groups" button.

Attributes

To learn how to create Attributes for your products, view the Creating Product Add-Ons document.

Add-Ons

To learn how to create Add-Ons for your products, view the Creating Product Add-Ons document.

Emails

1. Click on the "emails" link.
2. Select "packageInfo - Hosting Product" from the Welcome Email drop down menu.
3. Click on the "edit product emails" button.

Notifications

1. Click on the "notifications" link.
2. Select one of the following from the "Group To Notify On Event." drop down menu:

None

admin

cronadmin

3. Click on the "save" button.

Clone Product

NOTICE!! When you click on the "clone product" link, it will automatically create an exact duplicate of the product you are currently creating/modifying. When the new page loads after you click on the "clone product" link, rename the product to your new product's name, otherwise you will have two copies of the same product.

Advanced

The advanced option is specific to the add-ons for your product. If you click on the "advanced" link in your product screen, the following new options appear in the details section:

Is Option

Addon Group

Question

Filter By: Active

There are no articles in this category.

Filter By: Type

There are no articles in this category.

Search By: Keyword/ID

There are no articles in this category.

Product Groups

There are no articles in this category.

Show All

Show All

Products >> Product Groups >> Show Product Groups

1. Click on the Products tab.
2. Click on the "Product Groups" link in the left main sub nav.
3. Click on the "Show Product Groups" link in the left sub nav.

4. When the page loads you will see a list of all available product groups. Each record listed will show the following:

Product Group ID
API Name
Name
Actions

Edit - Click on the "Edit" link to edit the following:

API Name - Modify the API Name according to your specific needs.
Name - Modify the name of your group accordingly

Click on the "save changes" button when you are finished modifying the product group information.

Add Product Group

Add Product Group

Products >> Product Groups >> Add Product Group

Product Groups allow you to organize your products into different categories. You can create, modify, and delete as many product groups as you need to accommodate your needs.

1. Click on the Products tab.
2. When the page loads, click on the "Product Groups" link on the left Products sub nav.
3. A new sub nav will appear. Click on the "Add Product Group" link.
4. Set the following:

API Name: Enter a name or value in the API Name that you can reference when using the MBAPI. This value will not change even if you modify the display name below.

Note! The API Name above is for advanced users only. This is strictly in reference to developers using the MBAPI.

Name: Enter the name of your Product Group. Example: Servers, Shared Hosting, Reseller Hosting, Web Design, SEO, etc. It can be anything you want.

5. Click on the "add" link.

Pricing

There are no articles in this category.

Show Pricing

Show Pricing

NEED BEN TO UPDATE PRICING PAGE

Show Pricing

NEED BEN TO UPDATE PRICING PAGE

Add Pricing Option

Add Pricing Option

Products >> Pricing >> Add Pricing Option

Note: Below are the instructions specific to the "Add Pricing Option" feature in your system.

Example: You sell t-shirts available in S, M, L, and XL. You want to have different prices for each size.

1. Click on the Products tab.
2. Click on the "Pricing" link in the left sub nav.
3. Click on the "Add Pricing Option" link in the sub nav that appears.
4. When the page loads, enter the name of your pricing option. For example, if you sell t-shirts, enter "Size" as the pricing option name.
5. Click on the "add" button.
6. Next, read the Add Pricing Option Value document.

Add Pricing Option Value

Add Pricing Value

Products >> Pricing >> Add Pricing Option Value

Note: You have to create a pricing option before you can add a pricing option value. Read the Add Pricing Option document to learn how to create a pricing option.

Example: You sell t-shirts available in S, M, L, and XL. You want to have different prices for each size.

1. Click on the Products tab.
2. Click on the "Pricing" link in the left sub nav.
3. Next, click on the "Add Pricing Option Value" link in the left sub nav.
4. Select the pricing option name you created in Step 4 of the Add Pricing Option document from the drop down menu.
5. Next, enter a value for the pricing option. For example, if you are selling different sizes of t-shirts, start with "S" for Small and enter the value in the pricing option value textbox. This value will be displayed on the website widgets and will be seen by your customers.
6. Click on the "add" button.
7. Repeat the above steps until you have added all the sizes or your specific pricing option values. For example, if you are selling t-shirts, you would continue by entering M, L, XL, etc.
8. Now you need to go back to your product details page that you want to set pricing options. Once you are on the product details page,
9. Select your new pricing option from the Pricing drop down menu. For our example we selected Size.
10. Click on the "save" button.
11. Next, click on the "options" link.
12. Move the pricing option value(s) from the Selectable list on the right to the Selected list on the left. You can double-click each pricing option value or you can use the arrows at the bottom of each list .
13. Next, click on the "edit pricing options" button.

Note: Steps 12 and 13 may overlap with steps in the "Creating A Product" articles.

Filter By: Active

Filter By: Active

Products >> Pricing >> Filter By: Status

The "Filter By: Status" feature is designed to generate a list of prices based on the following:

- Show All (Default)
- Inactive
- Active

Choose from the drop down menu available and click on the arrow box.

Search By: Keyword/ID

Search By: Keyword/ID

Products >> Pricing >> Search By: Keyword/ID

Enter a keyword or ID and press the arrow button. The system will retrieve all records related to the keyword or ID you are searching.

TLDs

There are no articles in this category.

Show TLDs

Show TLDs

Products >> TLDs >> Show TLDs

1. Click on the Products tab.
2. Click on the "TLDs" link in the left main sub nav.
3. Click on the "Show TLDs" link in the left sub nav.
4. When the page loads, a list of all default TLDs will be generated. Each TLD record includes the following:

ID: The ID is the unique value to identify the TLD entry in the system. You can click on the ID link to expand the page for more information. Once the page is expanded, the following information will be shown:

- Auto Search
- Transfer Minimum Term
- Minimum Term
- Maximum Term
- Local Renew Type
- Remote Lock Enabled
- Is Transferable
- Transfer Type
- IDN Support
- IDN Type

Name: This represents the name you want to use for the TLD extension such as com, net, org, biz. You can have duplicate TLDs, but should give them a unique name in order to keep them separated.

Extension: The TLD extension such as com, net, org, biz.

Filter By: Active: You can filter TLDs by choosing from the drop down menu.

Show All
Inactive
Active

Whois Server: The whois server is the server used to verify the status of a domain. The status choices could be "registered" or "available."

Whois Response: When the whois server returns the status of the domain, it shows the "registered" or "available" status as "No Match" or "Not found" or something similar. The whois response is specific to the whois server.

Actions: The actions column provides the ability to edit or remove the TLD from the database.

Add TLD

Add TLD

Products >> TLDs >> Add TLD

1. Click on the Products tab.
2. Click on the "TLDs" link in the left main sub nav.
3. Click on the "Add TLDs link in the left sub nav.
4. When the page loads, set the following:

Name: Enter the name you want to use for this TLD. For example, if you have two .com TLDs, you could name one "com" and the other "com 2." Name them according to your personal and specific needs. This represents the name you want to use for the TLD extension such as com, net, org, biz. You can have duplicate TLDs, but should give them a unique name in order to keep them separated.

Extension: The TLD extension such as com, net, org, biz.

Registrar: Choose the registrar you want to use for this TLD from the drop down menu. Registrars will not appear in the list unless they are available and configured in your system. You can have the same TLD use multiple registrars. For example, "com" can use registrar 1, "com 2" can use registrar 2, etc.

Active: Check the box if the TLD is to be active.

Whois Server: The whois server is the server used to verify the status of a domain. Check with the registrar you are using for the TLD to acquire the correct whois server.

Whois Response: When the whois server returns the status of the domain, it shows the "registered" or "available" status as "No Match" or "Not found" or something similar. The whois response is specific to the whois server.

Auto Search: The auto search feature automatically searches for more than one type of TLD. For example, if you have .com, .net, .org, .biz and .info set to active and the "Auto Search" feature enabled by checking the "Enabled" box, the system will retrieve any available TLDs from your active list.

Is Transferable: If the domain can be transferred, check the "Yes" box.

Transfer Type: Select the transfer type from the drop down menu. Your choices include:

Code
Fax
Email
Mail

Transfer Minimum Term: Select the minimum number of days, weeks, months, and years you want to use for the transfer of this TLD from the drop down menu.

Minimum Term: Select the minimum number of days, weeks, months, and years you want to use for the registration of this TLD from the drop down menu.

Maximum Term: Select the maximum number of days, weeks, months, and years you want to use for the registration of this TLD from the drop down menu.

Local Renew Type: Select the renew type from the drop down menu. Your choices include:

- Disabled
- Auto Renew
- ModernBill Renew

IDN Support: If IDN is supported, check the "Yes" box.

IDN Type: Select the IDN type from the drop down menu.

Punycode

Remote Lock: If you want the TLD to be locked (not transferable), check the "Enabled" box.

5. Click on the "add tld" button.

Filter By: Status

Filter By: Status

Products >> TLDs >> Filter By: Status

The "Filter By: Status" feature is designed to generate a list of TLDs based on the following:

- Show All (Default)
- Inactive
- Active

Choose from the drop down menu available and click on the arrow box.

Search By: Keyword/ID

Search By: Keyword/ID

Products >> TLDs >> Search By: Keyword/ID

Enter a keyword or ID and press the arrow button. The system will retrieve all records related to the keyword or ID you are searching.

Website Widgets

There are no articles in this category.

Website Widgets

Website Widgets

Products >> Website Widgets >> Website Widgets

1. Click on the "Products" tab.
2. Click on the "Website Widgets" link in the left main sub nav.
3. Click on the "Website Widgets" link in the left sub nav.
4. When the page loads, a list of available website widgets will appear. Each record will include the following information:

ID - Numerical value generated by the database to identify the website widget.
(Cannot be modified.)

Website Widget Name - The name of the website widget.

Widget Template - Select the website widget you want to use from the drop down menu.

Order Form - The order form associated with the website widget. The order form includes the settings used for locale and currency. Each website widget uses the order form settings in the main shopping cart.

Currency - The currency used for the website widget.

Actions

Edit - Click on the "Edit" icon to modify the website widget. Set the following accordingly:

Website Widget Name - The name of the website widget.

Widget Template - Select the website widget you want to use from the drop down menu.

Order Form

Products - Move products from the Selectable list to the Selected list by double-clicking on the product or using the arrow keys.

Click on the "save" button.

Remove - Click on the "Remove" icon to delete the website widget from the database.

Add Website Widget

Add Website Widget

Products >> Website Widgets >> Add Website Widget

1. Click on the "Products" tab.
2. Click on the "Website Widgets" link in the left main sub nav.
3. Click on the "Add Website Widget" link in the left sub nav.
4. When the page loads, a list of available website widgets will appear. Each record will include the following information:

Website Widget Name - Enter the name of the website widget.
Widget Template - Select the website widget you want to use from the drop down menu.

Order Form - Select the order form associated with the website widget. The order form includes the settings used for locale and currency. Each website widget uses the order form settings in the main shopping cart.

Currency - The currency used for the website widget.

5. Click on the "save" button.

Search By: Keyword/ID

Search By: Keyword/ID

Products >> Website Widgets >> Search By: Keyword/ID

Enter a keyword or ID and press the arrow button. The system will retrieve all records related to the keyword or ID you are searching.

Coupons

Modifying A Coupon

1. Click on the Products tab.
2. Click on the "Coupons" link in the left main sub menu.
3. Click on the "Show Coupons" link in the Coupons left sub nav.
4. When the page loads, click on the ID link or the "pencil" icon in the Actions column for the coupon you want to modify.
5. Modify any of the settings according to your specific needs.
6. Click on the "edit coupon" button.

Removing A Coupon

1. Click on the Products tab.
2. Click on the "Coupons" link in the left main sub menu.
3. Click on the "Show Coupons" link in the Coupons left sub nav.
4. When the page loads, click on the red "x" icon in the Actions column for the coupon you want to remove.
5. Confirm that you want to remove the coupon by clicking on the "yes, really remove" button.

Pre-Apply A Coupon To A Product

1. Go to the product details page for the product you want to pre-apply a coupon.
2. Click on the "coupons" link from the product details page.
3. Select the coupon you want to automatically apply to the product when the customer orders.

Note: This applies to new orders only. It is not retroactive.

What if? If the drop down menu is empty it means you do not have any coupons in the system. Read the Add A Coupon document to learn how to create coupons.

4. Click on the "edit product coupons" button.

Applying A Coupon To A Product

1. Go to the product details page for the product you want to apply a coupon.
2. Click on the "coupons" link from the product details page.
3. Move the coupon(s) you want to apply to the product from the Selectable list to the Selected list by double-clicking on the coupon(s) or use the arrow buttons.

What if? If the Selectable list is empty it means you do not have any coupons in the system. Read the Add A Coupon document to learn how to create coupons.

4. Click on the "edit product coupons" button.

Add Coupon

Add Coupon

Products >> Coupons >> Add Coupon

You can create coupons for as many billing cycles as you want and/or period of time that you need specific to any product in your system. Follow the instructions below to get started.

1. Click on the Products tab.
2. Click on the "Coupons" link in the left main sub nav.

3. Click on the "Add Coupon" link in the left sub nav.

4. Set the following:

Coupon Code: Enter the name of your coupon.

Type: Select the type you want to use for your coupon (Percent or Unit)

Percent - You can set the coupon to be any percentage specific to your needs.

Unit - You can set a flat amount off of a particular product.

Discount: Enter either a percentage value or a flat amount value. (MUST be a numeric value.)

Comments: Enter any comments you want for this coupon.

Active: Is the coupon active? Select Yes.

Start Date: Enter the date you want the coupon to start by selecting the date options from each drop down menu or click on the "..." button to view the built-in calendar.

End Date: By default the "End Date" is disabled. If the "End Date" is left disabled, it will not expire. To enable the "End Date" setting, click on the checkbox. Then select the date options from each drop down menu or click on the "..." button to view the built-in calendar.

Number of cycles: Enter the number value for the amount of billing cycles you want the coupon to be applied.

Max Count: Enter the maximum number of times the coupon can be used.

New Signups: Is the coupon specific to new signups only? Check the box if Yes.

Apply Once Per Order: Click on the checkbox if you want this coupon to be applied once per order.

Order Forms: Select the order forms you want the coupon to be used on from the available list. Move the order form(s) values from the Selectable list on the right to the Selected list on the left. You can double-click each order form value or you can use the arrows at the bottom of each list.

Products: Select the products you want the coupon to be used on from the available list. Move the product(s) from the Selectable list on the right to the Selected list on the left. You can double-click each product or you can use the arrows at the bottom of each list.

5. Click the "Add Coupon" button.

Filter By: Status

Filter By: Status

Products >> Coupons >> Filter By: Status

The "Filter By: Status" feature is designed to generate a list of coupons based on the following:

Show All (Default)

Inactive

Active

Choose from the drop down menu available and click on the arrow box.

Search By: Keyword/ID

Search By: Keyword/ID

Products >> Coupons >> Search By: Keyword/ID

Enter a keyword or ID and press the arrow button. The system will retrieve all records related to the keyword or ID you are searching.

Time Cycles

There are no articles in this category.

Show All

Show All

Products >> Time Cycles >> Show All

Viewing

1. Click on the Products tab in the main navigation.
2. Click on the "Time Cycles" link in the left main sub nav.
3. Click on the "Show All" link in the left sub nav.
4. When the page loads, it will display all time cycles regardless of their status in the system. At the top of the list you will see the following:

ID
Name
Seconds
Minutes
Hours
Days
Months
Years
Actions

Sorting

Sort By Links:

- You can sort by any of the column header names by clicking on the column header links. For example, to sort by time cycle name, click on the Name link. It will sort the time cycle names alphanumerically. (Ascending/Descending)

Note: You can click on the "magnifying glass" icon next to the column header name links to perform a "Search by: Keyword/ID" sort.

Add Cycle

Add Cycle

Products >> Time Cycles >> Add Cycle

1. Click on the Products tab.
2. Click on the "Time Cycles" link in the Products left sub nav.
3. Click on the "Add Cycle" link in the Time Cycles sub nav that appears.
4. When the page loads, set the following:

Name: Enter the name of your time cycle.
Seconds: Enter the number of seconds for your time cycle.
Minutes: Enter the number of minutes for your time cycle.
Hours: Enter the number of hours for your time cycle.
Days: Enter the number of days for your time cycle.
Months: Enter the number of months for your time cycle.
Years: Enter the number of years for your time cycle.

Note: You must enter a name, but you need to only enter one of the time entries. For example, if you want to create a specific time cycle for 2 months, enter "2" in the Months textbox.

5. Click on the "add" button.

Search By: Keyword/ID

Search By: Keyword/ID

Products >> Time Cycles >> Search By: Keyword/ID

Enter a keyword or ID and press the arrow button. The system will retrieve all records related to the keyword or ID you are searching.

Cycle Discounts

There are no articles in this category.

Show All

Show All

Products >> Discount Cycles >> Show All

Viewing

1. Click on the Products tab in the main navigation.
2. Click on the "Discount Cycles" link in the left main sub nav.
3. Click on the "Show All" link in the left sub nav.
4. When the page loads, it will display all discount cycles regardless of their status in the system. At the top of the list you will see the following:

Group ID
Discount Group Name
Active
Actions

Sorting

Sort By Links:

- You can sort by any of the column header names by clicking on the column header links. For example, to sort by discount cycle name, click on the Name link. It will sort the time cycle names alphanumerically. (Ascending/Descending)

Note: You can click on the "magnifying glass" icon next to the column header name links to perform a "Search by: Keyword/ID" sort.

Add Discount Group

Add Discount Group

Products >> Cycle Discounts >> Add Discount Group

1. Click on the Products tab.
2. Click on the "Cycle Discounts" link in the Products left main sub nav menu.
3. Click on the "Add Discount Group" link in the Cycle Discounts left sub nav that appears.
4. Set the following:

Discount Group Name - Enter the name of the discount group you are creating.
Active - Check the box if you want the discount group to be active.

5. Click on the "add" button.

6. Next, continue with the steps described in the [Add Discount](#) article.

Show All Discounts

Show All Discounts

Products >> Discount Cycles >> Show All Discounts

Viewing

1. Click on the [Products](#) tab in the main navigation.
2. Click on the ["Discount Cycles"](#) link in the left main sub nav.
3. Click on the ["Show All Discount"](#) link in the left sub nav.
4. When the page loads, it will display all time cycles regardless of their status in the system. At the top of the list you will see the following:

Discount ID
Show All
Active
Cycle
Discount Percentages
Actions

Sorting

Sort By Links:

- You can sort by any of the column header names by clicking on the column header links. For example, to sort by discount ID, click on the [Discount ID](#) link. It will sort the discounts numerically. (Ascending/Descending)

Note: You can click on the "magnifying glass" icon next to the column header name links to perform a "Search by: Keyword/ID" sort.

Add Discount

Add Discount

Products >> Cycle Discounts >> Add Discount

1. Click on the [Products](#) tab.
2. Click on the ["Cycle Discounts"](#) link in the Products left main sub nav menu.
3. Click on the ["Add Discount"](#) link in the Cycle Discounts left sub nav menu.
4. Set the following:

Discount Group - Select the discount group you want to use for this discount from the drop down menu.

Active - Check the box if you want this discount to be active.

Cycle - Select the cycle you want to use for this discount from the drop down menu.

Discount Percentage - Enter the percentage you want to use for this discount.

5. Click on the "add" button.

6. Now you need to apply the discount group to your products. You can associate the discount group with as many products as you need. To apply the discount group to your products, go to the product details page of the product you want to associate the discount group.

7. Next, click on the "prices" link.

8. Click on the "edit" icon in the Pricing column.

9. When the page loads, select the discount group from the Cycle Discount Group drop down menu.

10. In most cases you may already have prices set for your product. If not, enter the regular pricing amounts. Then click on the "edit product variant prices" button.

Now the product will receive the discount upon each cycle renewal. The cycle renewal depends on what you set for Step 7: Cycle above.

Product Relations

There are no articles in this category.

Show Product Relations

There are no articles in this category.

Add Product Relations

There are no articles in this category.

PPC

There are no articles in this category.

Modules

Modules Related Functions

The "Modules" section of ModernBill is specific to configuration settings only. To review any "Modules" specific settings, please view the "Modules" directory in the "Configurations Manual" located at:

<http://manual.modernbill.com/v5co/>

System

System Related Functions

The "System" section of ModernBill is specific to configuration settings only. To review any "System" specific settings, please view the "System" directory in the "Configurations Manual" located at:

<http://manual.modernbill.com/v5co/>