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QUICK SETUP

Login with your username, password and PIN

Enter your company’s information
Enter your contact information

![Contact Information Form]

Enter your billing information:
**STEP 2: ENTER BILLING INFORMATION**

Rands

Enter the name of the currency in words (e.g. Rands, US Dollar, Euro etc)

R

Enter currency symbol that will be displayed with the amounts (e.g. R, $, € etc)

info@crmbill.com

Enter the email address which will be used to send and receive email from. You can setup multiple email addresses for invoices, help desk and other communications in System Settings later on.

********

Enter the email account password, rest assured your details are not shared with anyone and are stored with multiple encryption methods.

mail.crmbill.com

Enter POP Server Email Account which will be used for both SMTP and POP to send & receive emails from CRMbill. You can change this at a later stage
HOW TO CAPTURE TAX SETTINGS

From the Home screen, click “Click here to proceed”

From the Setup Check List, click “Tax”

Click the Edit icon from the Tax List and edit the Code/Name/Description/Other field as necessary. Once complete click the Update button.
ADVANCED COMPANY SETTINGS

From the Home screen, click “Click here to proceed”

From the menu, click Company Details:

Enter all relevant fields and click Update
### Company Settings

- **Company Type**: Close Corporation
- **Company Code**: BR
- **Registered Name**: Jinny Inc.
- **Trading Name**: Bravo
- **Registration Number**: 2006/0735277
- **VAT Number**: 44907726
- **Company Domain**: www.bravobravo.com
- **Currency Name**: Rand
- **Currency Symbol**: R
- **Currency Code**: ZAR
- **Company Slogan**: Jinny Bravo - Always Deliver
- **UIF Contribution by Employee**: 1%

Select the appropriate company type for your business. The trading name can be the same as the registered name as it will also be displayed on the invoices. The registration number will be used on all legal notices and invoices. The company domain name is ideally kept all letters lower case. The company’s currency should be under 100 characters.
HOW DO I SETUP EMAIL ACCOUNTS?

From the Home screen, click “Click here to proceed”

Click “Email Account”

Enter all relevant email details into the Email Account Details Screen and click Add New. Should you want your emails available from HelpDesk, please remember to tick the checkbox.

Should you need to Edit any Email Account Details, click the Edit icon and when you’re finished, click the Update button.
ADVANCED HELPDESK SETTINGS

From the Home screen, click “Click here to proceed”

From the menu, click HelpDesk

Complete all relevant fields under the tab, Help Desk and click Update.
After updating your settings, click “Create Help Desk Departments”

Create a new Help Desk Department by completing all required fields (covered in detail in (Setting up Helpdesk Departments & Giving Access to Agents to individual departments))
SETTING UP HELPDESK DEPARTMENTS & GIVING AGENTS ACCESS TO INDIVIDUAL DEPARTMENTS

From the Home screen, click “Click here to proceed”

From the menu, click “Departments”

Complete all relevant fields and then click Add New
After adding a new department, it will be visible in the Help Desk Department List, to link departments and users, click the Edit icon.

And complete the User Type/User/Department fields, then click Update.
From here, you can add emails for Support Department, Billing Department, Order Department or other.

When adding a new department, if a relevant Email address does not already exist, you can quickly add a new Email address for use by that department, by clicking the + icon alongside the “Email account sender” dropdown.

This will open a new dialogue box for you to create a new Email address. Fill out the relevant fields and click “Add Email Account”. The email address will be available for selection once you return to the Help Desk Department Details screen.
This screen is also available from the Main Menu, by clicking Help Desk Settings.
ADVANCED EMAIL SETTINGS

From the Home screen, click “Click here to proceed”

From the Setup Check List menu, click “Email Settings”

From the Email Settings screen, you can configure advanced options for each Email address in your system. Once complete, click Update.
To create new Email Accounts, click the “Create Email Accounts” link
This will open a new dialogue box for you to create a new Email address. Fill out the relevant fields and click “Add Email Account”. This Email address will now be available on the Email Settings page for you to apply advanced configuration should you require.
INVOICE SETTINGS & INVOICE TEMPLATE CONFIGURATION

From the Home screen, click “Click here to proceed”

From the Setup Check List menu, click “Invoice Settings”

Complete all the fields relevant to your Invoicing requirements
Once you’ve completed setting up your Invoicing, click Update

To create an Invoice Template, click “Update Invoice Template”
Select InvoiceTemplate from the dropdown menu on the Manage Message Template screen

This will load the template into the Rich Text Editor where you can customize as required

Once your changes are complete and you choose to either update the selected template or save it as a new template.
HOW DO I UPDATE MY COMPANY PROFILE?

From the main menu, click “Company Settings”

Update any relevant detail by completing the field and click the Update button when complete.
HOW DO I UPDATE ADVANCED COMPANY SETTINGS?

From the main menu, click “Miscellaneous Settings”

Update any relevant detail by completing the field and click the Update button when complete.
HOW DO I CHANGE THE BRANDING OF MY CLIENT PORTAL?

From the main menu, click “Client Portal Branding”

This will open the Company Settings Page, then select the Client Portal tab

Should you require sample backgrounds, you can click the “Download Sample Backgrounds” link at the bottom of the page. You can also update all relevant client portal details. When you’re finished, please click the Update button.
## Client Portal Settings

### Client Portal URL
Enter Client Portal URL that will be displayed on all communication emails to your customers. Replace "xxxx" with the "OwnerId" that has been sent to you in the welcome email. You can also use CHAME Records and setup a sub domain to point to the client portal URL.

### Live Chat URL
Set the Live Chat URL. This will be the link that will be used in the Client Portal top right. If you don't provide Live Chat then you can try "Livezilla.com" which is one of the best free Live Chat applications which you can install for free on your servers.

### Client Portal Top Banner
Set the Client Portal Top Banner banner image path. For best results background image size should be 245x70 pixels. You can upload this image in any location and just specify the location of the image.

### "Forgot Password" background image path
Set the "Forgot Password" background banner image path. For best results background image size should be 520x280 pixels. You can upload this image in any location and just specify the location of the image.

### "Contact Us" background image path
Set the "Contact Us" background banner image path. For best results background image size should be 520x280 pixels. You can upload this image in any location and just specify the location of the image.

### "Video Tutorial" background image path
Set the "Video Tutorial" background banner image path. For best results background image size should be 520x280 pixels. You can upload this image in any location and just specify the location of the image.

### "Login Page" background image path
Set the "Login Page" background banner image path. For best results background image size should be 520x280 pixels. You can upload this image in any location and just specify the location of the image.

### "Unsubscribe" background image path
Set the "Unsubscribe" background banner image path. For best results background image size should be 520x280 pixels. You can upload this image in any location and just specify the location of the image.
HOW DO I ADD A CUSTOMER?

From the Quick Links menu on the left of the page, click “Add New User” link.

This will open the Add Customer screen from where you can add the new user’s details.
When you’re complete, click the Add User button

The new user will now be visible in the User Dashboard on the left of the screen.
HOW DO I ADD NEW EMPLOYEES & ISSUE THEM WITH A NEW LOGIN PASSWORD and PIN?

From the Quick Links menu on the left of the page, click “Add New User” link.

When adding the new user, select Employee – Permanent from the User Type dropdown list, and Active from the User Status dropdown list.
When you’re complete, click the Add User button

From the main menu, click Human Resources, and then from the sub menu, click Employee Profiles
This will load the Employees screen. Select Permanent from the Employee Type dropdown list and then click the Search icon on the right hand side of the screen. This will bring up the main Employee.

When you dropdown the Employee dropdown list, all the employees will be listed.

Complete all the relevant fields for the employee and then click the Add New button.
The new employee will now be in the employee list on the right hand side. To generate the employee’s PIN, click the Generate PIN button on the bottom left of the screen.
HOW CAN I SETUP CUSTOM TEMPLATES?

From the main menu, click the System Settings menu item and then click “Message Templates” from the sub menu.

Select “Task” from the Template List dropdown list.

Make any relevant amendments to the template and once you’re finished, click the Update Selected Template button. Should you wish to view the HTML of the template, click the button on the bottom left of the screen.
You can also delete the template or save a new template.

Other templates are also available for editing/use are and should you need to, you can also create your own.
HOW DO I RESET MY LOGIN PIN FOR THE ADMIN PORTAL?

Click “My Profile” from the Quick Links menu on the left

Click the “Change My Pin” tab on the main menu

Complete all the relevant fields and click “Change PIN”
<table>
<thead>
<tr>
<th>Change PIN</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter Current PIN</td>
<td>******</td>
</tr>
<tr>
<td>Enter New PIN</td>
<td>******</td>
</tr>
<tr>
<td>Confirm New PIN</td>
<td>******</td>
</tr>
<tr>
<td>Enter City Of Birth</td>
<td>Cape Town</td>
</tr>
<tr>
<td>Enter National ID Number</td>
<td>1111</td>
</tr>
</tbody>
</table>

Change PIN
HOW DO I SEND CLIENT PORTAL LOGIN DETAILS TO MY CUSTOMERS?

Tick the checkbox at the top of the page (alongside the dropdown list containing your company name)

Enter your search criteria in the freetext box and select the field you would like to search on. Then click “GO”

From the main “Portal Detail” page, click the “Resend Portal Password” button
HOW DO I CHANGE MY LOGIN PASSWORD FOR THE ADMIN PORTAL?

Click “My Profile” from the Quick Links menu on the left

Update the password in the textbox
Remember to fill the Date of Birth field and then click the “Update Profile” button

<table>
<thead>
<tr>
<th>Surname</th>
<th>UIF Applicable</th>
<th>UIF Amount</th>
<th>Medical Plan</th>
<th>Car Allowance</th>
<th>Retirement Plan</th>
<th>Yearly Leave (Days)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bravo</td>
<td>R100</td>
<td>R200</td>
<td>R0</td>
<td>R0</td>
<td>R0</td>
<td>22</td>
</tr>
<tr>
<td>Ethnicty</td>
<td>Current Salary</td>
<td>Payee Amount</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>South African</td>
<td>R200</td>
<td>R0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ID Number</td>
<td>111111</td>
<td>111111</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Passport</td>
<td>01 Nov 1989</td>
<td>01 Nov 1989</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date of Birth</td>
<td>01 Nov 1989</td>
<td>01 Nov 1989</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
HOW DO I CHANGE A CUSTOMER’S PASSWORD FOR THE CLIENT PORTAL?

First tick the checkbox at the top of the page, then enter your search criteria, matched against the field you’re searching against, and then click “GO”

Now enter the new password into the password textbox

And then click “Update Profile”
HOW DO I LIST ALL MY CUSTOMERS WITH DIFFERENT STATUSES?

From the main menu, under the “Customer Relations” tab, there is a link for each of the different statuses of your customers. To view your Active Customers, click “Active Customers”.

This will list all your Active Customers
HOW DO I MAKE A GROUPING FOR MY EXPENSES?

From the main menu, select “Billing & Invoicing” and then click “Grouping”.

Enter the code and description and then click “Add New”
Enter the next code and description and then click “Add New” again. Both of your records will be displayed in the “Expense Item Group List”.

![Expense Item Group List screenshot]
HOW DO I SUSPEND OR TERMINATE A CUSTOMER?

Select the company name from the dropdown list, then enter the search criteria and click “GO”

Select the new user status from the “User Status” dropdown list

Then click the “Update Profile” button
### Portal Details

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>User ID</td>
<td>508</td>
</tr>
<tr>
<td>Username</td>
<td>jamesbravo</td>
</tr>
<tr>
<td>Password</td>
<td>jamesbravo</td>
</tr>
<tr>
<td>User Type</td>
<td>Company</td>
</tr>
<tr>
<td>User Group</td>
<td>Default</td>
</tr>
<tr>
<td>Language</td>
<td>English</td>
</tr>
<tr>
<td>User Status</td>
<td>Suspended</td>
</tr>
</tbody>
</table>

### Personal Details

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>No</td>
</tr>
<tr>
<td>Firstname</td>
<td>James</td>
</tr>
<tr>
<td>Surname</td>
<td>Bravo</td>
</tr>
<tr>
<td>Company Type</td>
<td>Close Company</td>
</tr>
<tr>
<td>Company Name</td>
<td>Bravo Bravo Inc.</td>
</tr>
<tr>
<td>VAT Number</td>
<td>246452</td>
</tr>
<tr>
<td>Registration No</td>
<td>3004-143243</td>
</tr>
<tr>
<td>Ethnicity</td>
<td>South African</td>
</tr>
<tr>
<td>ID Number</td>
<td></td>
</tr>
</tbody>
</table>

### Other Settings

- **Email Format**: HTML
- **Referred By**: Google
- **Current Hosts**: [CRMd++]

---

CRMd++ Help File V1.0.0.0
HOW DO I APPLY FOR LEAVE?

From the Quick Menu, click “My Profile”

Complete all the relevant fields and the click the “Apply for Leave” button.
All your leave requests will be displayed in the “Leave List” on the right of the screen.
HOW DO I SETUP PRICING FOR MY PRODUCTS AND SERVICES?

From the main menu, select “Billing & Invoicing” and then click “Products & Services Settings”

From the category menu on the left, select the category of the product or service you would like to manage.
Click the Settings icon of the product or service you would like to manage.

Select the “Pricing” tab from the top menu and then complete all the relevant pricing fields. Finally, click the “Add New” button.
The new pricing will be displayed in the Price List
HOW DO I CHANGE PRODUCT OR SERVICE SETTINGS?

From the main menu, select “Billing & Invoicing” and then click “Products & Services Settings”.

From the category menu on the left, select the category of the product or service you would like to manage.
Click the Settings icon of the product or service you would like to manage.

Update the data of the product or service you are managing and then click the “Save” button.
HOW TO CREATE DIFFERENT EXPENSE CATEGORIES

From the “Billing & Invoicing” main menu, click the “Categories” link

Enter the code and description, and if required click the Is Vatable checkbox. Then click the “Save” button.
Your categories will all be displayed in the Expense Category List.
HOW DO I DELETE A CUSTOMER?

Enter your search criteria in the quick search area at the top of the page.

Select Customer from the person type list and then click the “GO” button.

Identify the customer you would like to delete from the list of customers presented to you and click the “Delete” icon.

You will be presented with a modal window displaying the details of the customer you selected for deletion. If this is the correct customer, click the “Confirm Delete” button.
HOW DO I SEARCH FOR CUSTOMERS?

Navigate to the top of the page to the quick search area.

The first dropdown list contains the names of your company/s. select the one you would like to search against.

Should you wish to directly open the detail of your search if there is only one result returned, tick the checkbox.

In the 1st textbox enter the text you would like to search for and then from the following 2 dropdown lists, select the criteria you would like to search against.

The selection in the first dropdown list determines the entries in the second dropdown list.

One you have selected the relevant criteria, click the “GO” button.
HOW DO I ADD A NEW VENDOR OR SUPPLIER?

From the main menu, select “Billing & Invoicing” and then click the “Vendors & Suppliers” link.

Click the “Add New Supplier” button.
A new modal window will open. Enter in the relevant criteria into the fields and click the “Add Supplier” button.

The supplier will now be listed on the Suppliers page. To maintain your supplier, click the “User Profile” icon.
The Supplier Management page will load. From here all aspects of the supplier, such as Products, Expenses and Transaction, amongst others, can be maintained.
HOW DO I EDIT A CUSTOMER PROFILE?

Enter the relevant search criteria into the quick search area at the top of the page. Then click the “GO” button.

Update the fields that need to change and then click the “Update Profile” button.
HOW DO I ADD CONTACT AND ADDRESS DETAILS FOR A CUSTOMER?

From the quick search area at the top of the page, enter in the criteria and click the “GO” button.

Click the “User Profile” icon of the customer you would like to maintain.

Enter the contact detail, telephone, cell phone or email address and click the “Add New” button.

From the Contact List, you can edit, copy or delete the contact details.
Below the contact details pane is the address management. Enter the customer’s address and click the “Add New” button. Addresses can also be edit, copied or deleted from the Address List.
HOW DO I ADD A NEW CUSTOMER?

From the main screen, click the “Create Customer” icon.

Enter all available information for the customer.

Profile areas such as: Portal Detail, Contact Details, Personal Details, Address Details and Other Settings (e.g. Email accounts) are available. Should you wish to send a Welcome Message to the customer, tick the “Send Welcome Message” tickbox. Then click the “Add User” button.
HOW DO I ADD CUSTOMER FIELDS FOR MY PRODUCTS AND SERVICES?

From the main menu, select “Billing & Invoicing” and the click the “Products & Services Settings” link.

From the category menu on the left of the screen, select the category you would like to maintain.
Click the “Manage Service Settings” icon of the category you would like to maintain.

Click the “Custom Fields” tab on the top menu.

From the Custom Fields screen, you are able to copy a current custom field or create a new one from scratch by filling in all the relevant fields and clicking the “Add New” button.
Any custom fields will be displayed in the Custom Fields List.
HOW DO I ADD PRODUCTS & SERVICES?

From the main menu, select “Billing & Invoicing” and then click “Add New Product/Service”.

Complete each relevant field for your new product or service and then click the “Save” button. Please note certain fields are mandatory.
HOW DO I EDIT A CUSTOMER INVOICE?

From the quick search menu at the top of the page, enter your search criteria and click the “GO” button.

Click the “Invoices” tab from the main menu and then select the invoice you would like to edit, by clicking the “Update Invoice” icon.

Take note of the invoice instructions.

And proceed to make any updates to the available fields, such as invoice status, invoice dates and others. Once you have completed your updates, click the “Update” button in the Action Panel.
**Invoke Instructions**

**REFUNDING:**
1. Only "Paid" invoice items can be refunded.
2. If an item is refunded, then "SYSTEM" will do credit transaction.
3. "System" will move refund amount to User Live Credit.
4. "System" will log a Task for Account Manager to do a refund.
5. Account Manager must make sure Live Credit Amount is removed from User Profile on payment to client.

**CANCELLATION:**
1. Only "open" invoice items can be cancelled.
2. If canceling a paid invoice item, "system" will move the payment to other open invoice item otherwise "system" will move it to Live Credit.

---

**Invoice Items**

<table>
<thead>
<tr>
<th>ID</th>
<th>Service</th>
<th>Description</th>
<th>Status</th>
<th>Tax</th>
<th>Amount</th>
<th>Total</th>
<th>Paid</th>
<th>Transaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>87</td>
<td>Unlimited Windows Hosting: test.com::</td>
<td>1x Monthly (Next Month) Charge for Unlimited Windows Hosting</td>
<td>Open</td>
<td>0.02</td>
<td>12.99</td>
<td>12.99</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>88</td>
<td>Unlimited Windows Hosting: test.com::</td>
<td>1x Setup Fee for Unlimited Windows Hosting test.com::</td>
<td>Open</td>
<td>0.02</td>
<td>12.99</td>
<td>12.99</td>
<td>0.00</td>
<td></td>
</tr>
</tbody>
</table>

---

**Invoice Details**

- **Invoice Number:** 349460
- **Purchase Order:** 7539156
- **Invoice Status:** Open
- **Invoice Date:** 2013/02/26 10:02:45 PM
- **Due Date:** 2013/02/29 00:00:00
- **Total Amount:** 8,195.07
- **Total Paid:** 0.00
- **Quote Number:**
- **Don't Create Refund Task for Account Manager:**

---

**Action Panel**

- **User List**
- **Cancel**
- **Update**
WHAT HAPPENS WHEN A PAYMENT IS APPLIED?

Beginning from the Customer Management screen, in our example there is R29.07 outstanding.

Click the “Add Payment” icon.

Enter the payment details. Should the client have used an incorrect reference in the bank payment, tick the checkbox to notify them of their error. When complete, click the “Update” button.
The credit from the payment is now reflected as a “Live Credit” in the Transaction List.

If a payment was outstanding for a service, the service would be in pending status. After the final payment is made, a ticket to update the status will be generated.
HOW DO I CREATE PRODUCTS & SERVICES WHICH REQUIRE RECURRING BILLING?

From the main menu, select “Billing & Invoicing” and then click “Add New Product/Service”.

Complete all the relevant fields, be sure to tick the “Is Recurring Service” checkbox. Then click the “Save” button.
From the main menu, click the “Invoices” tab. Since this is a recurring payment, select Monthly from the Price Type dropdown list. When complete, click the “Add New” button.
HOW DO I ADD A NEW PRODUCT AND GENERATE AN INVOICE FOR A CUSTOMER?

From the main menu, select “Billing & Invoicing” and then click the “Place New Order” link.

Click the “Add Service to New User” icon.

Complete the relevant fields under the Portal Detail, Contact Details, Personal Details, Address Details and Other Settings. When complete, scroll down to complete the order.
Under Service Details, any custom fields you may have created will be available. Complete the fields and click “Save Changes”. This will add the user, add the service to the user and generate an invoice.