



Billsby

Set Up Guide for CRC Users



The Billsby Guide for CRC users

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How to get set-up with Billsby as a CRC user

Before you start with Billsby you will need to make sure you have a **merchant account** and **payment gateway** set up, or in the process of being approved. Billsby then handles the recurring element of your customers subscriptions by triggering the payment gateway to charge your customers' cards.

Your payment gateway will handle verification of cards and processing of payments. Your merchant account, when linked to your payment gateway, will hold the money you've made, to allow you to withdraw when needed.

To get a merchant account set up, head to this link: [Merchant account](#) and click the "Request a merchant account" button. Your merchant account will set you up with a payment gateway if you don't have one already.

Not every payment gateway will work. It's important you request the use of [PaymentCloud](#) as a payment gateway, as they specialise in working with Credit Repair clients. With Credit Repair being considered a higher risk company base, most gateways will not accept applications. If for any reason you cannot work with PaymentCloud, check out their parent company [Authorize.net](#)

NB: Your payment gateway will have a separate charge for this payment processing. Head to their website to find out more about the payment gateway fee.

Once you have both the merchant account and payment gateway set-up, you are ready to sign up with Billsby.

Sign up to Billsby through this link:

<https://www.billsby.com/landing/credit-repair-cloud/>



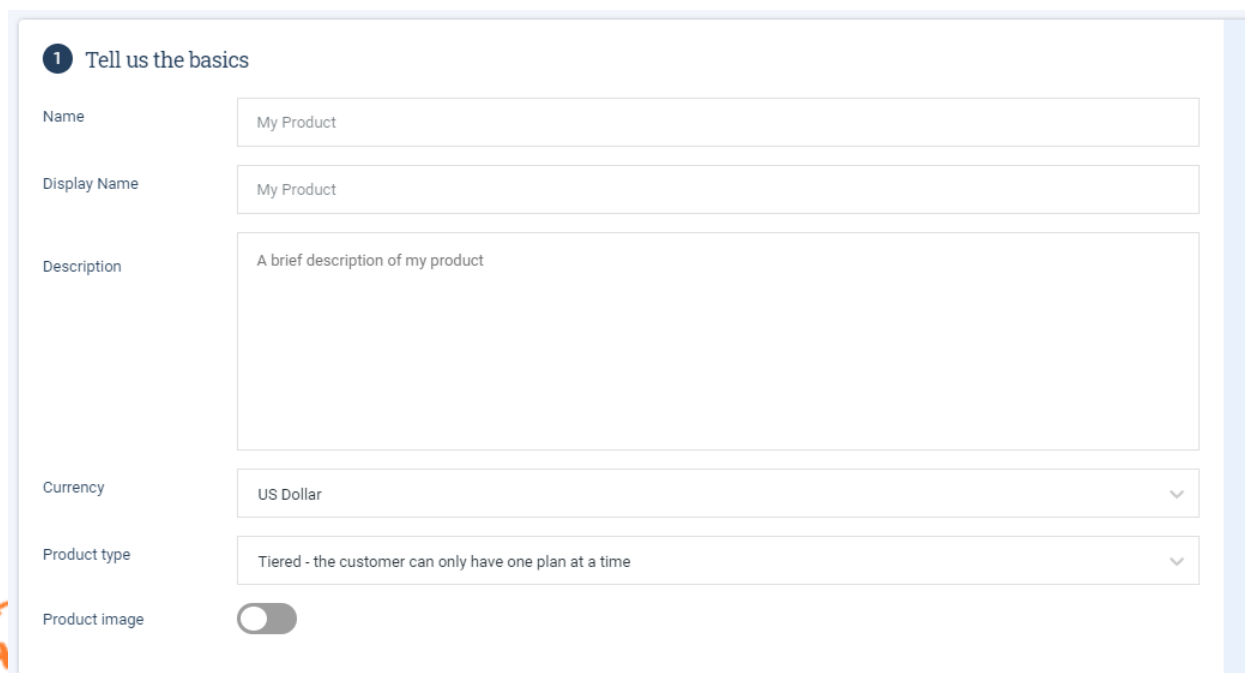
Once you're signed up to Billsby - Creating your first products

When you sign up, you'll create your company and are asked to provide your company name and address - you can change these at any point in the **Configuration > Company Details** section of your Billsby account.

Once you're through to the Dashboard, you will be asked to create your first product. Head to **Products > Products, plans, and cycles > Add a Product**.

A Product is the overarching theme of what you sell. For the majority of CRC customers this could be defined simply as **Credit Repair**. During the set-up process, you can click a field and on the right hand side is an info box that will explain what the field is asking for and what it does.

1.



1 Tell us the basics

Name: My Product

Display Name: My Product

Description: A brief description of my product

Currency: US Dollar

Product type: Tiered - the customer can only have one plan at a time

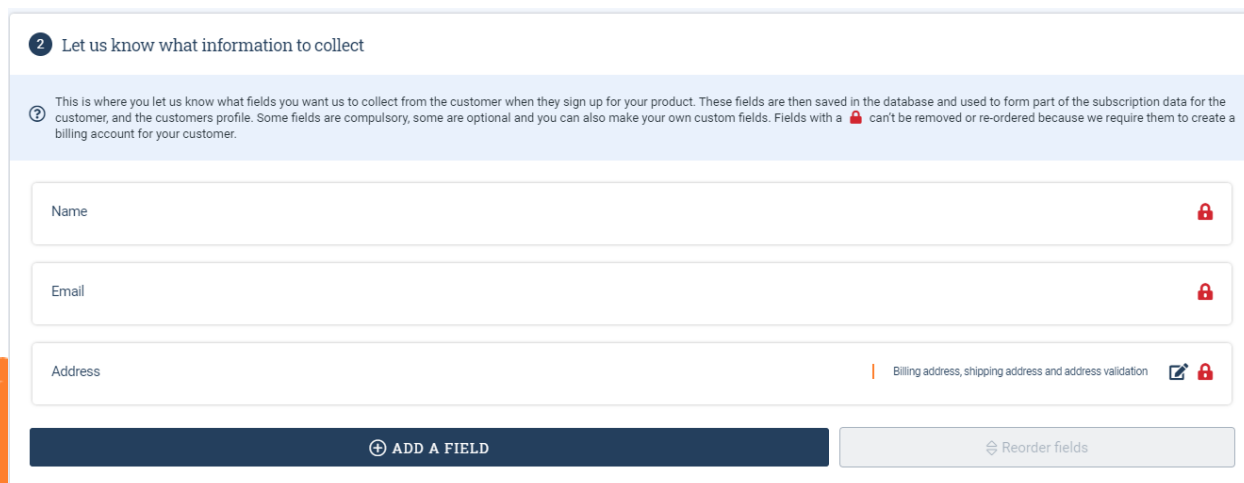
Product image: ☐

Tell us the basics


You'll need to fill these fields with the information that represents your business. If you plan on making multiple products, you'll want to add more information on each product in the **Description** fields. However, the cost of your plans will not be added here, this will be done in the **Plans** section.


You'll want to set your currency to what your company will be dealing in - this cannot be changed so you will need to make sure it's correct. If you are charging in more than one currency, you'll need to set these up as separate products as each product can only be set to one currency.


2.







2 Let us know what information to collect

ⓘ This is where you let us know what fields you want us to collect from the customer when they sign up for your product. These fields are then saved in the database and used to form part of the subscription data for the customer, and the customers profile. Some fields are compulsory, some are optional and you can also make your own custom fields. Fields with a  can't be removed or re-ordered because we require them to create a billing account for your customer.

Name 

Email 

Address   Billing address, shipping address and address validation

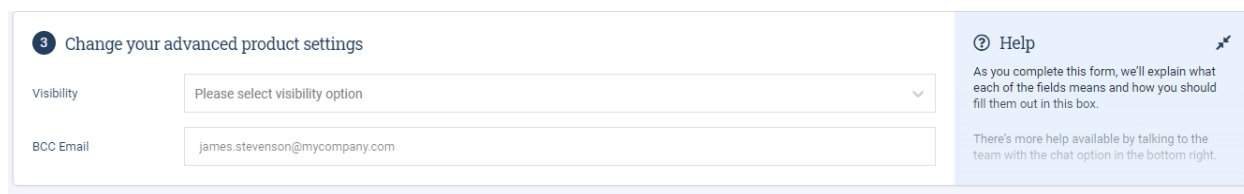
 ADD A FIELD  Reorder fields

Let us know what information to collect

This section defines what information we collect from your customers during the checkout process, when they sign up. The Name, email address, Billing address and Card details are compulsory fields - we need these for billing purposes.

In this section you can add in any additional information you want to collect. An example is phone numbers, which is one of our presets. You can also add any custom fields that are more specific to your company and services.


3.



3 Change your advanced product settings

Visibility

BCC Email

ⓘ Help 

As you complete this form, we'll explain what each of the fields means and how you should fill them out in this box.

There's more help available by talking to the team with the chat option in the bottom right.

Advanced settings

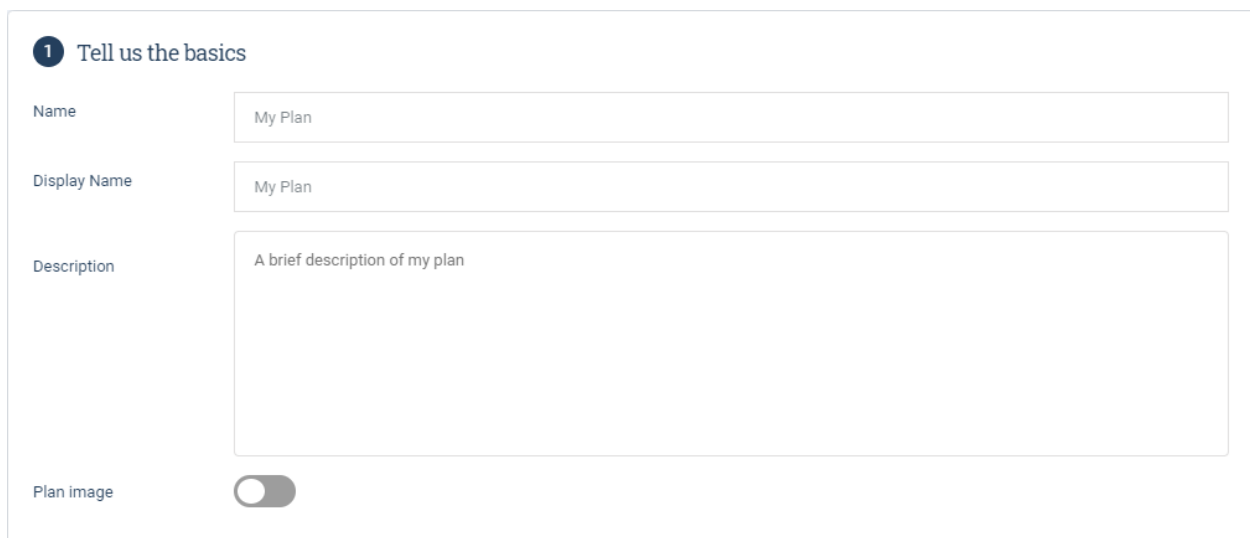
For this last section, make the Visibility of the product **Public** so your customers will be able to see this as an option in your checkout. If you want to get email notifications when someone subscribes, put the email address you want to receive these notifications too in the **BCC Email** field.

Click **create product** when you're done.

Now click **Add your first plan** - this is where you'll define what your plan is and the costs of your service.

Creating a Plan

If you have 3 plans - let's say you have a Silver, Gold, and Platinum - you'll create 3 separate plans. Let's start with a silver plan.



The screenshot shows a form titled "1 Tell us the basics" with the following fields:

- Name:** A text input field containing "My Plan".
- Display Name:** A text input field containing "My Plan".
- Description:** A large text area containing "A brief description of my plan".
- Plan image:** A toggle switch that is currently turned off.

Your **Name** and **Display name** will be the same - **Silver plan**. The description here is important, you'll want to explain a breakdown of what you're charging to the customers, and any additional information they will need to know about.

In this instance your pricing model will be set to **Flat fee** as your plan will be a set flat cost. An example of this could be "\$99 per month with a set up fee of \$100".

If you have a different style of payment plan that you're not confident on setting up, head to the support documentation at support.billsby.com and [click here](#) to watch a video explaining the different pricing models.

Once you have a model, you'll be creating your **Cycle**, which is where you'll define what your plan costs and how frequently it's charged. More details on this can be found in the [Cycle Creation section](#).

After you've created your cycle, the next step in the plan configuration is Add-ons and Allowances you want to link to this specific plan. For this setup you can skip this step as it doesn't apply to our current setup.

Advanced settings


For this last section, you will not need to add anything in the Feature tags section. If you already have a BCC email for the product, you will not need to add it here.

The Redirect URL is where your customers will be directed when they confirm their subscription, so when a customer finishes checking out they get directed to this webpage.

Your visibility can be set to **Public**.

Once you're ready, click create plan.

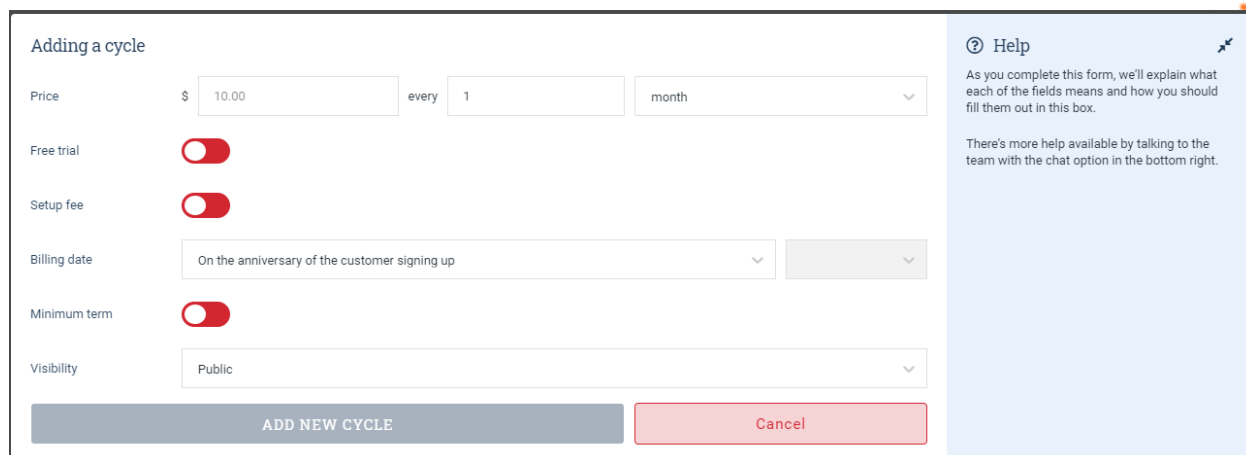
5 Change your advanced plan settings

Feature tags	<input type="text" value="Add new tag"/>
	<small>Feature tags can only contain lower case and numerical values. Once you've entered the feature tag into the field you'll need to press your space key to confirm the tag. You can enter multiple feature tags into the field before adding them to the plan.</small>
BCC Email	<input type="text" value="james.stevenson@mycompany.com"/>
Redirect URL	<input type="text" value="https://www.mycompany.com/registration-complete"/> <small>/?cid=XXX&sid=XXX</small>
Visibility	<div>Public </div>



Cycle Creation

This is what a cycle looks like:



The screenshot shows a form titled "Adding a cycle" with the following fields and controls:

- Price:** A text input with "\$ 10.00", followed by "every" and a text input with "1", and a dropdown menu with "month" selected.
- Free trial:** A red toggle switch that is turned on.
- Setup fee:** A red toggle switch that is turned on.
- Billing date:** A dropdown menu with "On the anniversary of the customer signing up" selected, and a greyed-out dropdown menu to its right.
- Minimum term:** A red toggle switch that is turned on.
- Visibility:** A dropdown menu with "Public" selected.

At the bottom of the form are two buttons: "ADD NEW CYCLE" (grey) and "Cancel" (red). To the right of the form is a light blue sidebar with a "Help" section containing explanatory text and a chat icon.

Price: this determines the billing cycle. If you have a \$99 monthly payment, you would put 99 every 1 month.

Free trial: This will delay all automatic payments by a given time. If you set up a free trial for 1 month, the customer will not be charged a monthly fee or a set-up fee until that free trial is over.

Set-up fee: This is a one-time charge that will be automatically processed on the initial sign-up of a customer.

Billing Date: You have two choices. Anniversary of sign up will charge both the monthly fee and the set-up fee at the same time and charge the customer every month on the day they sign up.

Your other option is on a Fixed day each month, this will charge every customer on this plan on a set date (It will charge the set-up fee on sign-up and then the monthly fee on the set date.

Minimum Term: This does not mean a set period of time before the subscription cancels. Minimum term is a contractual period before the customer can cancel themselves.

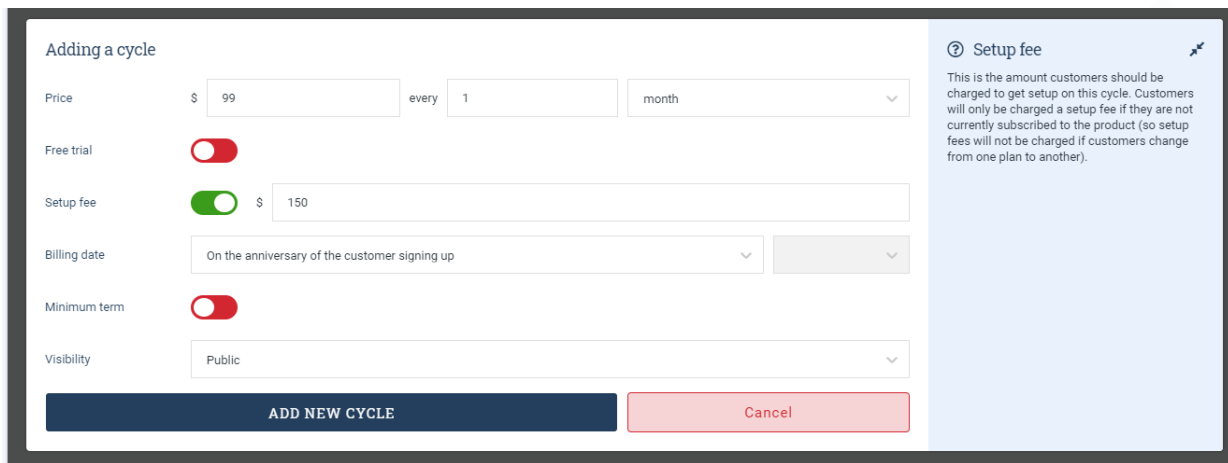
Visibility: You'll need to set this as public.

Different payment plans

We understand that sometimes your business has requirements that don't exactly match the Billsby default. For example, the most common example we see CRC users is that they want their set up fee to cover the first month of payment. That is, they don't want to charge the monthly fee at the point the customer signs up, only the set up fee. There are three ways to get around this:

1. Discounted first month method

For this, you'll need to create a **100% discount** with a corresponding **Multi-use coupon with a fixed term of 1 month**. This is the one Billsby recommends, as it works the best and shows correctly on any invoices. The only negative to this method is it relies on your customer to input a coupon code to get the first month free, if they don't input it they will be overcharged, so you should be clear in the plan description. You can find out how to set up the discount [here](#).



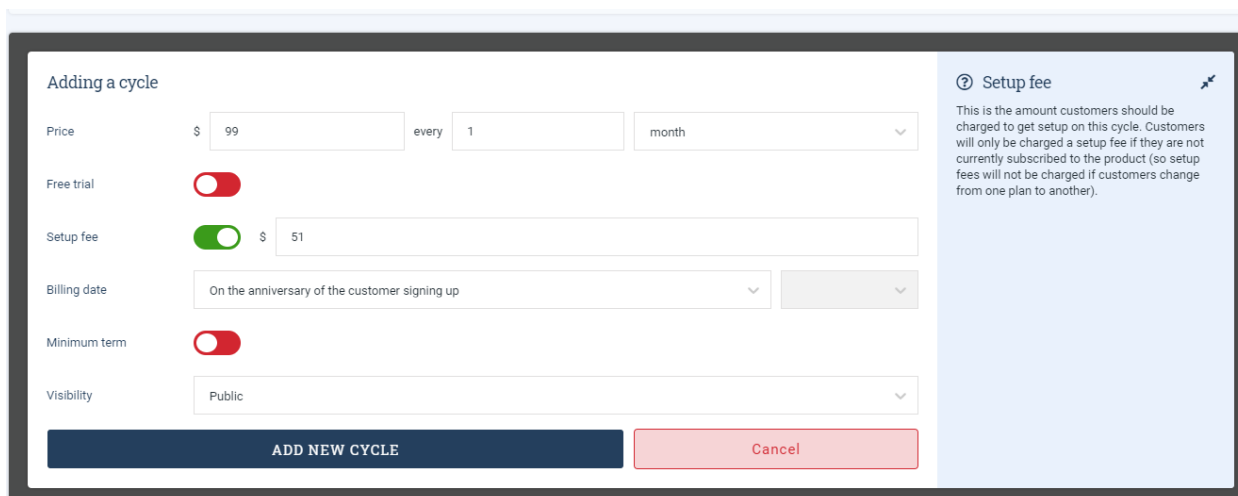
The screenshot shows the 'Adding a cycle' form with the following settings:

- Price:** \$ 99 every 1 month
- Free trial:** Disabled (red toggle)
- Setup fee:** Enabled (green toggle) at \$ 150
- Billing date:** On the anniversary of the customer signing up
- Minimum term:** Disabled (red toggle)
- Visibility:** Public

At the bottom are two buttons: 'ADD NEW CYCLE' (dark blue) and 'Cancel' (pink). To the right, a 'Setup fee' section explains: 'This is the amount customers should be charged to get setup on this cycle. Customers will only be charged a setup fee if they are not currently subscribed to the product (so setup fees will not be charged if customers change from one plan to another).'

2. Differential method

This method involves utilising the difference between your set up fee and the monthly fee. In essence if you charge a 150 set-up fee for the first month and 99 every month after, you will put



The screenshot shows the 'Adding a cycle' form with the following settings:

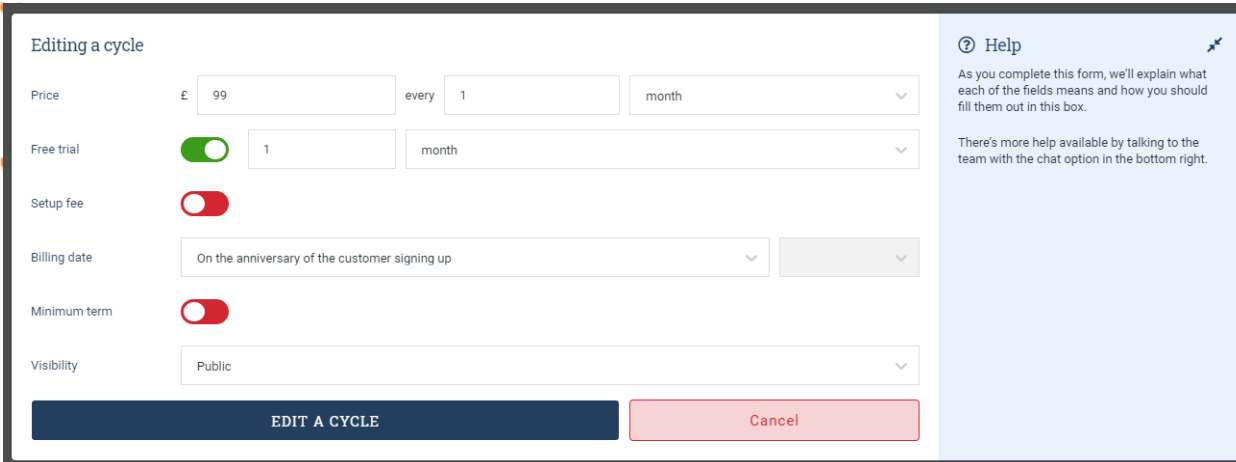
- Price:** \$ 99 every 1 month
- Free trial:** Disabled (red toggle)
- Setup fee:** Enabled (green toggle) at \$ 51
- Billing date:** On the anniversary of the customer signing up
- Minimum term:** Disabled (red toggle)
- Visibility:** Public

At the bottom are two buttons: 'ADD NEW CYCLE' (dark blue) and 'Cancel' (pink). To the right, a 'Setup fee' section explains: 'This is the amount customers should be charged to get setup on this cycle. Customers will only be charged a setup fee if they are not currently subscribed to the product (so setup fees will not be charged if customers change from one plan to another).'

your set-up fee as $(150-99=51)$. This will then charge the 99 and the 51 at the same time. This is the easiest method to use if your set up fee is more than your monthly payment fee. If it's less, this method won't work.

3. Free trial method. This method involves using the free trial function in cycle creation for the first month (so the customer is charged nothing for the subscription until the trial ends), and then manually charging a one time fee on the customer, for the set-up fee.

Whilst it does the job, and reflects accurately on the invoice, this takes away some of the automatic nature of what we do. Once a customer is subscribed, you have to manually go into



Editing a cycle

Price: £ 99 every 1 month

Free trial: ☒ 1 month

Setup fee: ☐

Billing date: On the anniversary of the customer signing up

Minimum term: ☐

Visibility: Public

EDIT A CYCLE **Cancel**

Help

As you complete this form, we'll explain what each of the fields means and how you should fill them out in this box.

There's more help available by talking to the team with the chat option in the bottom right.

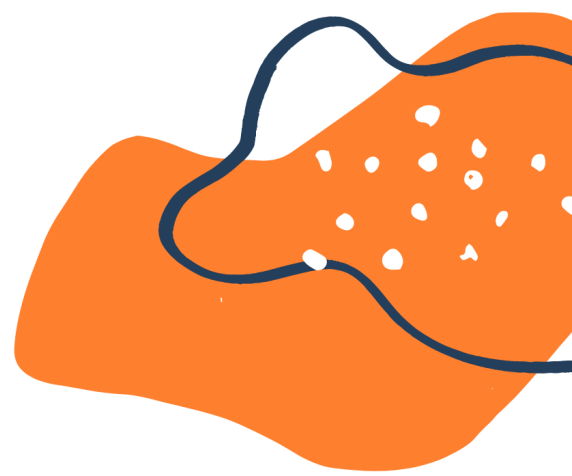
that customer to charge them. This isn't recommended for a larger number of customers.

Discount

For most people, the first option of the discount is the most favourable. To configure this discount you should follow the instructions below:

First, head to **Products > Discounts and coupons** and click **Add discount**.

The screenshot below shows the discount is 100% and is applied to the entire subscription (discounts don't affect set up fees so this will still be charged). Now we need to determine exactly what this discount can be used for, by the coupon. Here's what your coupon should look like - again you can change names (and the Coupon code) as you see fit:



Basic information

Name

☒ Allow this discount to be used in conjunction with others

Help

As you complete this form, we'll explain what each of the fields means and how you should fill them out in this box.

There's more help available by talking to the team with the chat option in the bottom right.

Plans this discount can be applied to

This is where you let us know which plans your discount can be applied to. If you choose to let the discount be applied to all plans this will also include any plans you create in the future.

☒ The discount can be applied to all plans

☐ The discount can only be applied to specific plans

Discount type | Percentage

Discount deduction

This is where you let us know what percentage we should deduct when this discount is applied and whether it should be deducted from the plan price only or the entire subscription. Discounts will never be deducted from allowance overage or set-up fees.

☐ The deduction is taken from the plan only

☒ The deduction is taken from the entire subscription

Percentage %

SAVE CHANGES TO DISCOUNT

Basic information

Name

Eligible customers

Eligible customers

This is where you let us know which of your customers are eligible to use this coupon.

Coupon type | Multi use

How the coupon works

This is where you let us know if you need to generate more coupons, when all of your coupons should expire and how long your customer can apply the discount to their subscription.

Coupon code

Uses limit

This coupon has already been used 0 times so the uses limit cannot be reduced below 0.

Expiration date ☒

Discount length

Help

As you complete this form, we'll explain what each of the fields means and how you should fill them out in this box.

There's more help available by talking to the team with the chat option in the bottom right.

SAVE CHANGES TO COUPON

The important thing here is the **fixed term** length of 1 month. This means that when the code FREEMONTH is entered the customer will be discounted 100% of their plan for the first month, and our system will automatically expire that discount after the first month.

With this set-up (and because discounts don't affect set-up fees), this means that the first monthly payment is not charged, and the set-up fee is charged only in the first month on sign up, and then every month afterwards only the monthly fee is charged.

Finally, to finish up, you'll want to head to **Settings>Configuration>Checkout and account management settings** and scroll down to the checkout options as shown here:

Checkout Self service

Show or hide features

Some features of checkout are switched on by default, and others are switched off. You can change which features you'd like in your checkout modal here.

	Progress indicator Give customers an indication of how far through the checkout journey they are	<input checked="" type="checkbox"/>
	Summary cart Let customers see and tweak their subscription during the checkout process - great for complex plans	<input checked="" type="checkbox"/>
	Card logos Show or hide card logos depending on which your payment gateways can accept	<input checked="" type="checkbox"/> Visa <input type="checkbox"/> JCB <input checked="" type="checkbox"/> Mastercard <input type="checkbox"/> Diners <input checked="" type="checkbox"/> American Express
	How was this calculated? Show customers an explanation of how their first payment was calculated	<input checked="" type="checkbox"/>
	Apply coupons Allow customers to apply coupons during the checkout process	<input checked="" type="checkbox"/>
	Wix compatibility mode Hides our close button and disables the ability to continue to another page on the confirmation screen	<input type="checkbox"/>

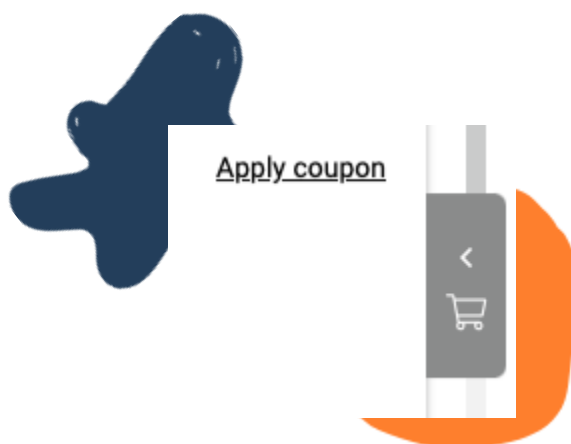
UPDATE FEATURES **Cancel**

You'll want to make sure both **Summary cart** and **Apply coupons** are ticked.

You will be able to add a coupon on the add payment method screen. As shown in the screenshot below

Pay £30 and subscribe

[How was this calculated?](#) [Apply coupon](#)



Another way is to use the summary cart that appears during the checkout process as shown in the screenshot above.

Setting up your payment gateway

Next you need to link your payment gateway (Authorize.net or Paymentcloud) account so that customers can pay you. This is because transactions are handled by your payment gateway.

In the left hand menu, go to **Settings > Configuration > Payment gateways**, and choose **Authorize.net**.

Billsby

- Dashboard
- Customers
- Subscriptions
- Invoices & credit notes
- Products
 - Products, plans & cycles
 - Add-ons
 - Allowances
 - Discounts and coupons
- Logs
- Reports
- Zapier
- Settings
 - Configuration**
 - Embed codes
- Help & docs
- Creditrepaircloud
- Keenan

Configuration

Get your Billsby account working exactly how you want it, and looking great, by configuring your settings and preferences company works on Billsby.

The basics

Company details
Update your company name, select your timezone and define settings for email handling

Pause and cancel subscription
Decide what happens when customers pause or cancel their subscriptions

Payment gateways
Add payment gateways to your Billsby account

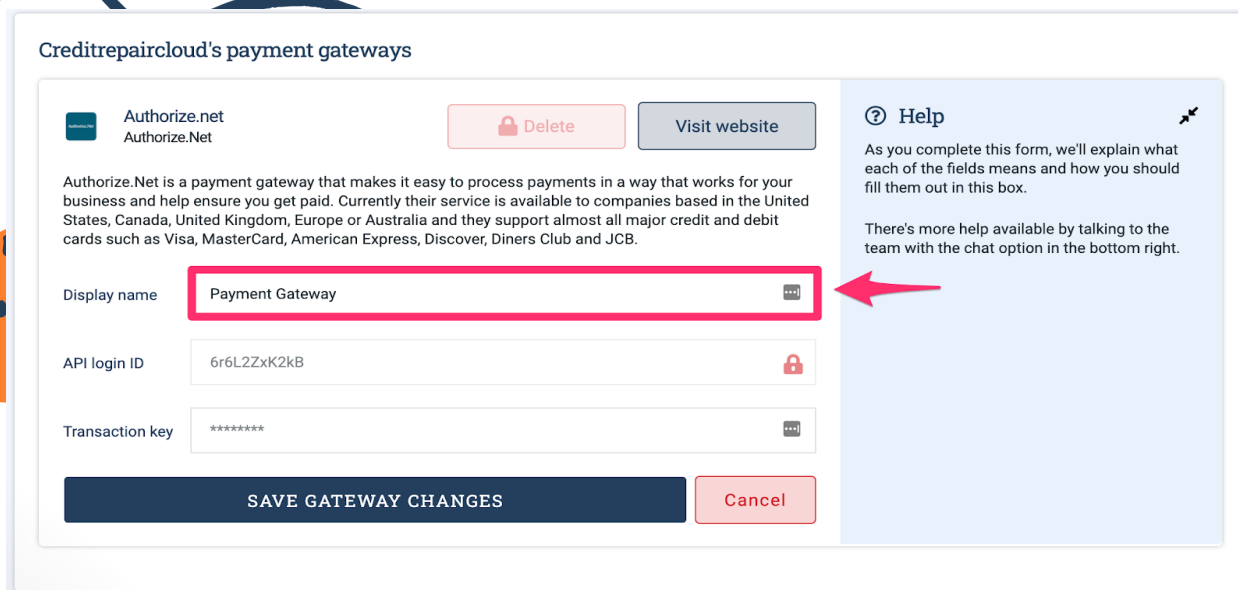
Currencies
Determine which payment gateway to use for each currency in your Billsby account

Taxes
Define tax rules based on your customers countries of residence and connect tax services to automate tax reporting


Invoices settings
Configure the content of invoices sent to your customers

Set the display name to whatever you want. In this example we are using Authorize.net and will call this **Payment Gateway**.

Log in to your [Authorize.net](https://authorize.net) account and get your API key from authorize.net. You'll do this by clicking **Account** and then clicking **API Credentials & Keys**.



Creditrepaircloud's payment gateways

 Authorize.net
Authorize.Net

[Delete](#) [Visit website](#)

Authorize.Net is a payment gateway that makes it easy to process payments in a way that works for your business and help ensure you get paid. Currently their service is available to companies based in the United States, Canada, United Kingdom, Europe or Australia and they support almost all major credit and debit cards such as Visa, MasterCard, American Express, Discover, Diners Club and JCB.

Display name

API login ID

Transaction key

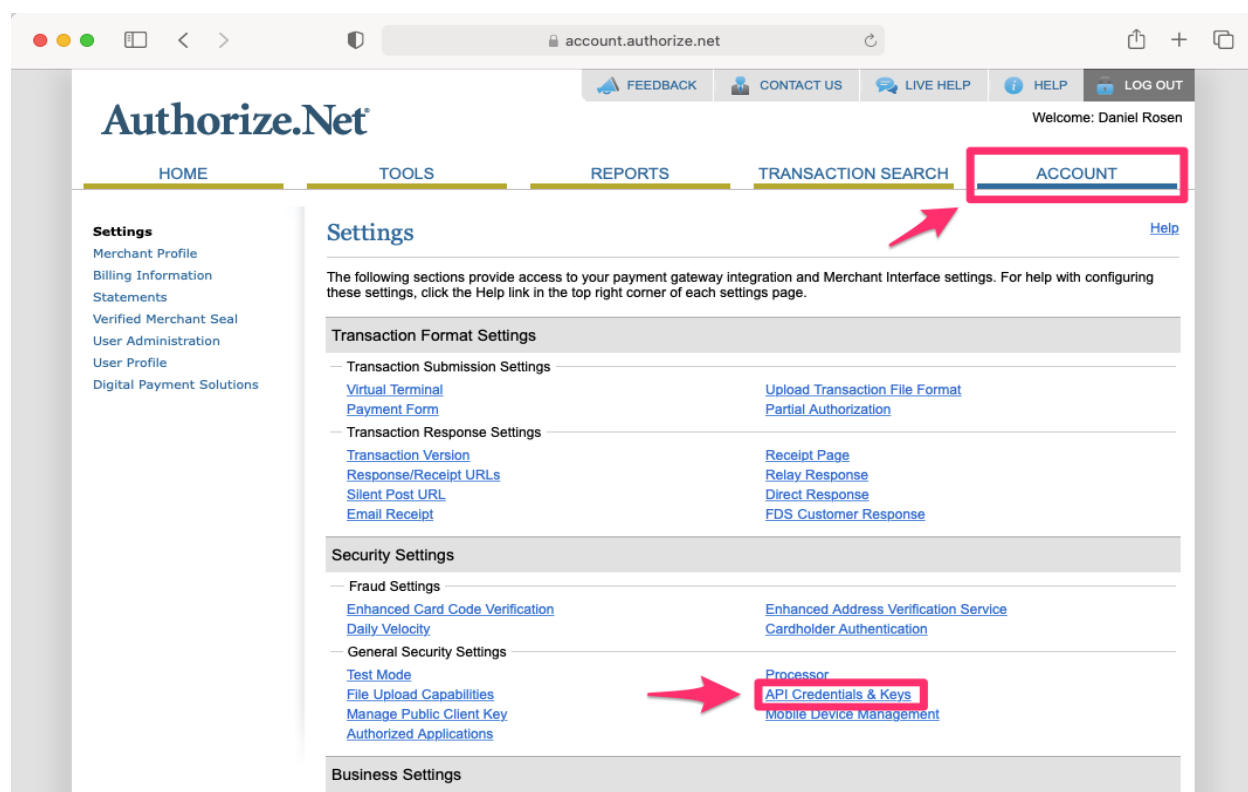
[SAVE GATEWAY CHANGES](#) [Cancel](#)

Help

As you complete this form, we'll explain what each of the fields means and how you should fill them out in this box.

There's more help available by talking to the team with the chat option in the bottom right.

Copy your API Login ID, For **Obtain**, select **New Transaction Key** and then hit **Submit**.



account.authorize.net

FEEDBACK CONTACT US LIVE HELP HELP LOG OUT

Welcome: Daniel Rosen

HOME TOOLS REPORTS TRANSACTION SEARCH **ACCOUNT**

Settings

The following sections provide access to your payment gateway integration and Merchant Interface settings. For help with configuring these settings, click the Help link in the top right corner of each settings page.

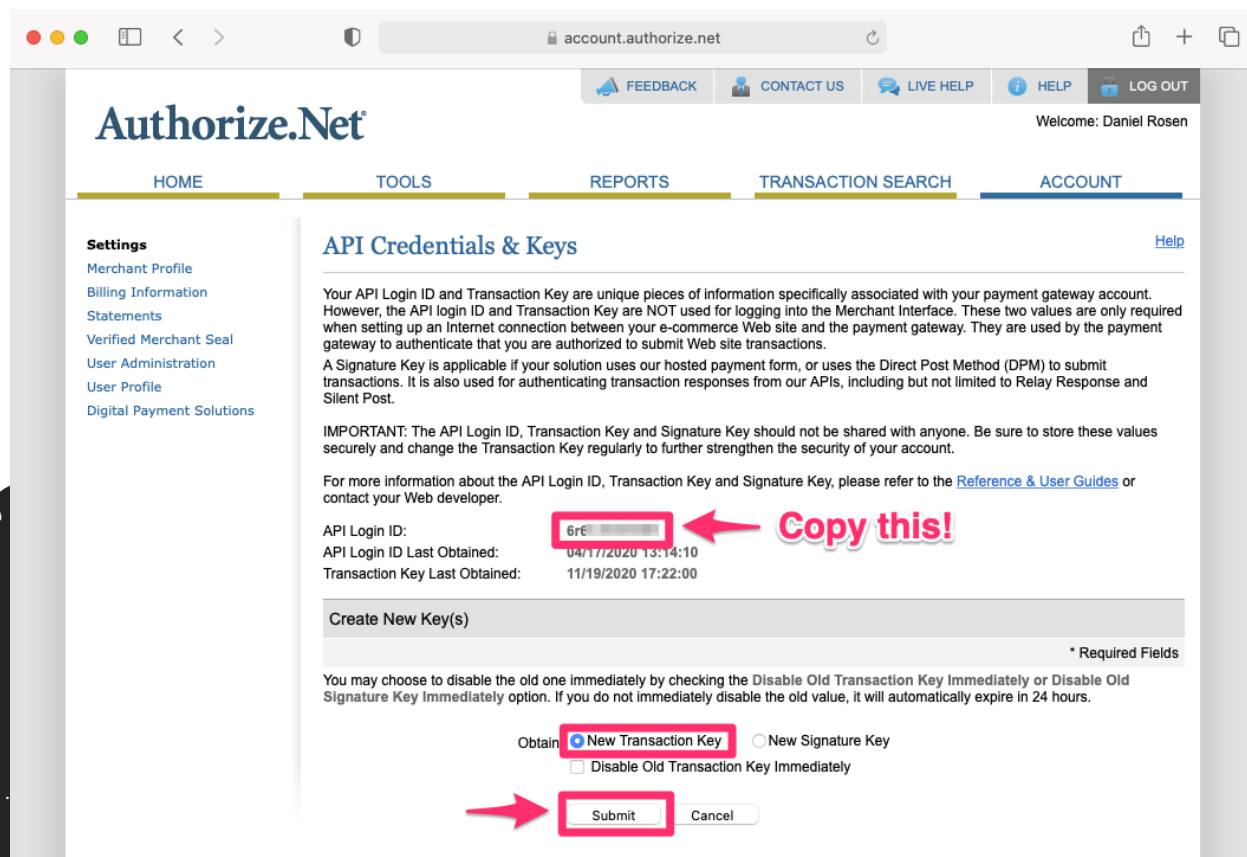
Transaction Format Settings

- Transaction Submission Settings
 - [Virtual Terminal](#)
 - [Payment Form](#)
 - [Upload Transaction File Format](#)
 - [Partial Authorization](#)
- Transaction Response Settings
 - [Transaction Version](#)
 - [Receipt Page](#)
 - [Response/Receipt URLs](#)
 - [Relay Response](#)
 - [Silent Post URL](#)
 - [Direct Response](#)
 - [Email Receipt](#)
 - [FDS Customer Response](#)

Security Settings

- Fraud Settings
 - [Enhanced Card Code Verification](#)
 - [Daily Velocity](#)
 - [Enhanced Address Verification Service](#)
 - [Cardholder Authentication](#)
- General Security Settings
 - [Test Mode](#)
 - [File Upload Capabilities](#)
 - [Manage Public Client Key](#)
 - [Authorized Applications](#)
 - [Processor](#)
 - [API Credentials & Keys](#)**
 - [Mobile Device Management](#)

Business Settings



The screenshot shows the Authorize.Net merchant interface. The browser address bar displays 'account.authorize.net'. The top navigation bar includes links for FEEDBACK, CONTACT US, LIVE HELP, HELP, and LOG OUT. The user is logged in as 'Daniel Rosen'. The main navigation menu has tabs for HOME, TOOLS, REPORTS, TRANSACTION SEARCH, and ACCOUNT. The left sidebar contains a 'Settings' menu with links to Merchant Profile, Billing Information, Statements, Verified Merchant Seal, User Administration, User Profile, and Digital Payment Solutions.

API Credentials & Keys [Help](#)

Your API Login ID and Transaction Key are unique pieces of information specifically associated with your payment gateway account. However, the API login ID and Transaction Key are NOT used for logging into the Merchant Interface. These two values are only required when setting up an Internet connection between your e-commerce Web site and the payment gateway. They are used by the payment gateway to authenticate that you are authorized to submit Web site transactions.

A Signature Key is applicable if your solution uses our hosted payment form, or uses the Direct Post Method (DPM) to submit transactions. It is also used for authenticating transaction responses from our APIs, including but not limited to Relay Response and Silent Post.

IMPORTANT: The API Login ID, Transaction Key and Signature Key should not be shared with anyone. Be sure to store these values securely and change the Transaction Key regularly to further strengthen the security of your account.

For more information about the API Login ID, Transaction Key and Signature Key, please refer to the [Reference & User Guides](#) or contact your Web developer.

API Login ID: 6rE [redacted] **Copy this!**
API Login ID Last Obtained: 04/17/2020 13:14:10
Transaction Key Last Obtained: 11/19/2020 17:22:00

Create New Key(s)

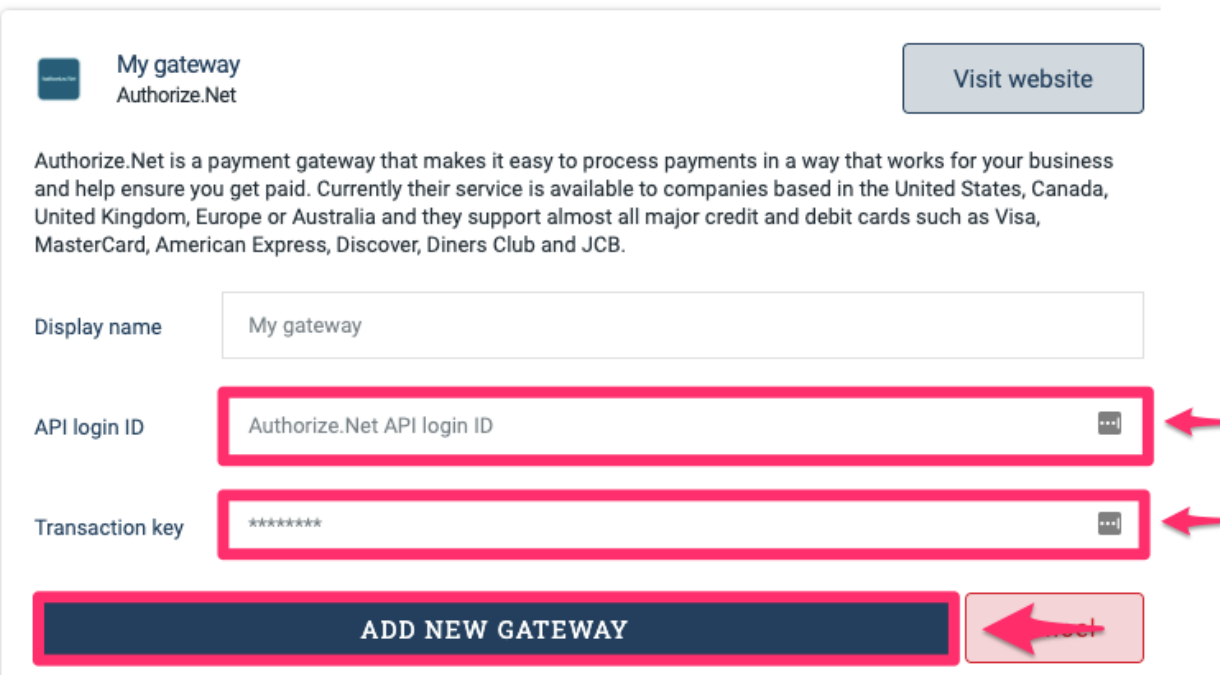
* Required Fields


You may choose to disable the old one immediately by checking the Disable Old Transaction Key Immediately or Disable Old Signature Key Immediately option. If you do not immediately disable the old value, it will automatically expire in 24 hours.

Obtain ☒ New Transaction Key ☐ New Signature Key
☐ Disable Old Transaction Key Immediately

Submit **Cancel**

Return to Billsby and paste your API Login ID and Transaction Key, then click **Add New Gateway**.



 **My gateway**
Authorize.Net [Visit website](#)

Authorize.Net is a payment gateway that makes it easy to process payments in a way that works for your business and help ensure you get paid. Currently their service is available to companies based in the United States, Canada, United Kingdom, Europe or Australia and they support almost all major credit and debit cards such as Visa, MasterCard, American Express, Discover, Diners Club and JCB.

Display name

API login ID

Transaction key

ADD NEW GATEWAY [Cancel](#)

Finally, go to **Settings > Configuration > Currencies** and click the box next to your Base currency and click the Payment Gateway and click save currency.

You're now done with setting up your gateway and are one step closer to charging your clients!

Connecting Billsby to CRC (Zapier)

We use a tool called [Zapier](#) that sends all of your Billsby customers straight into CreditRepairCloud.

We have setup a **Zap** that will connect the two platforms.

Create client: This zap will create new Credit Repair Cloud clients when new customers are created in Billsby <https://zapier.com/app/editor/template/405038>

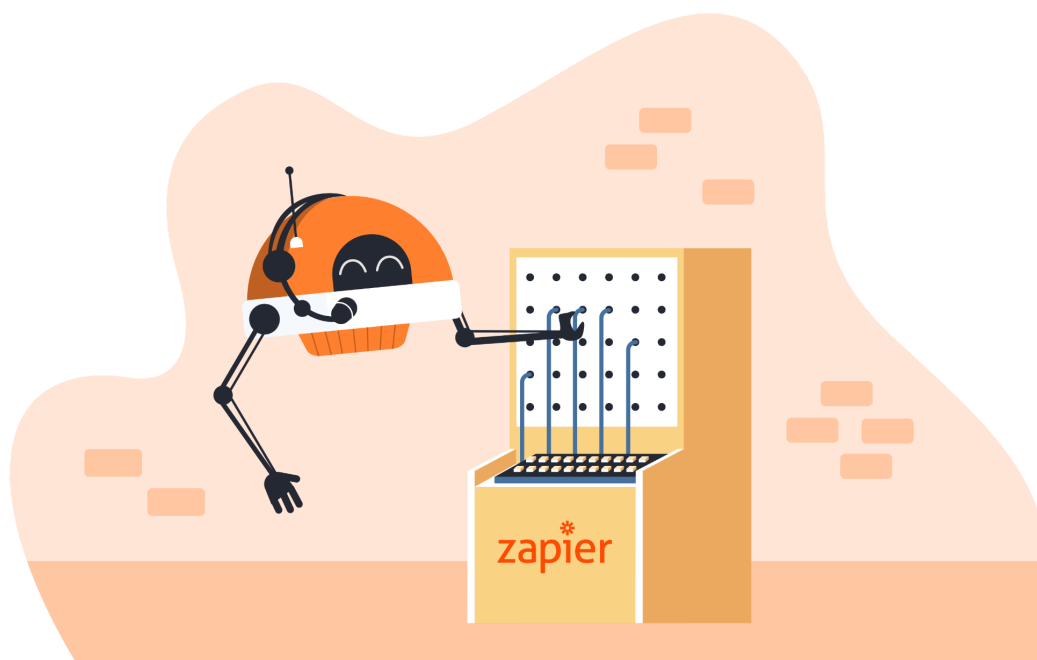
We also have a video walkthrough which you can find [here](#) on how to add the create client Zap for a simple walkthrough.

For creating a client in the first zap, you'll want to sign in to your Billsby accounts using the API key (**Settings > Configuration > Api keys and webhooks**) and your CRC account.

You'll want to have a test customer in your account. Head to **Customers** and click **add a customer** - here you can just input any details as they won't matter. Click Manually input payment details and then there are already details in so you can continue. Create the customer and then sign them up to any plan at all.

When going through the Create client Zap, you can now just press continue, and test and continue wherever possible.

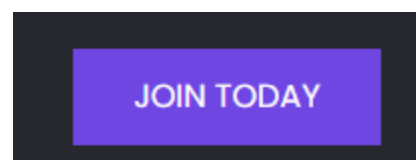
At the end, make sure to click **turn on zap**, and then click the link above to set up the **update client** zap. Turn on that Zap as well and you'll be all good to go!



Embedding Billsby to your website

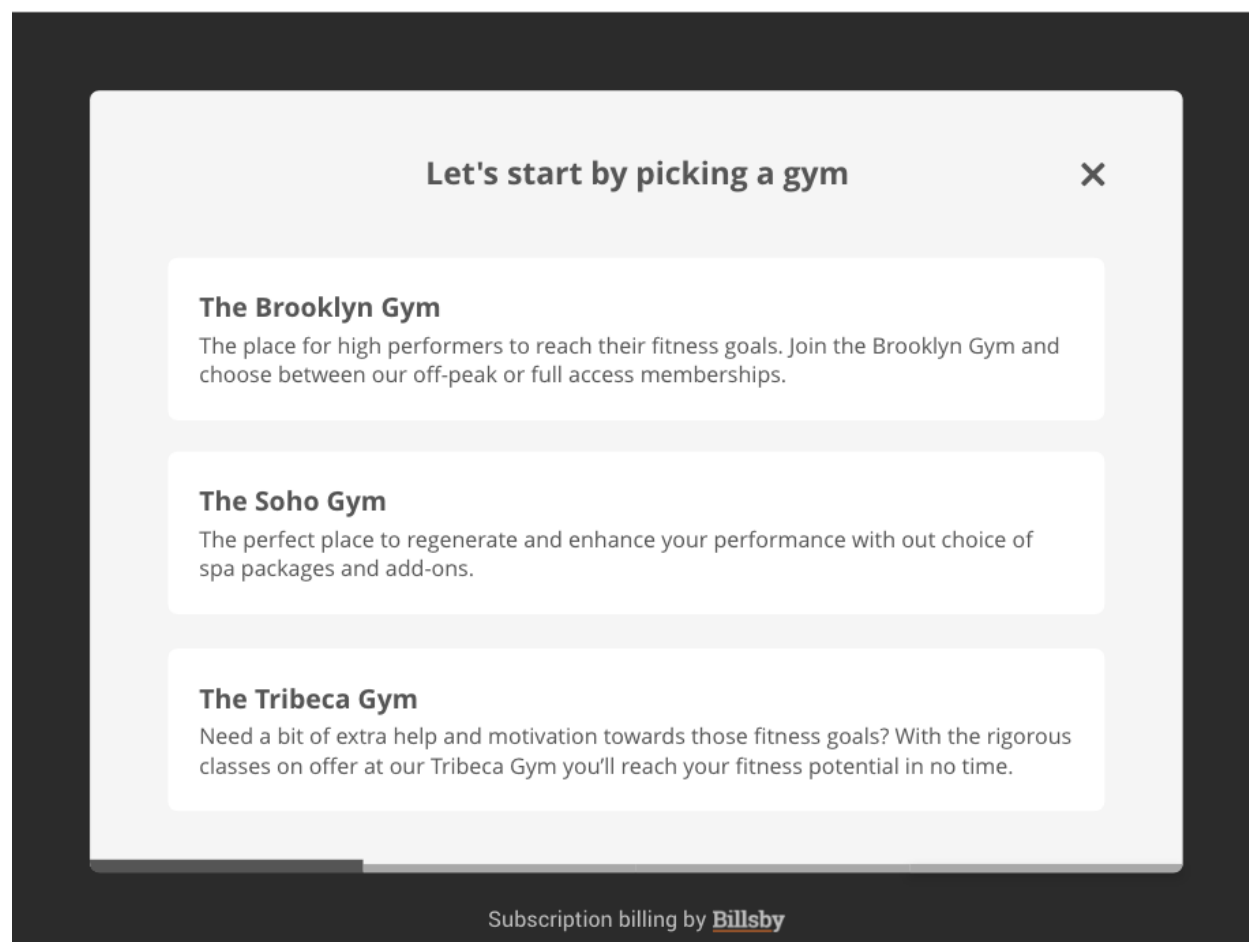
In order for your customers to sign up through Billsby without you having to manually input their details, we create a checkout modal that opens directly on your website. The customer will click a button (that you embed in your site) and be brought to a checkout where they will choose their plan, and input all the relevant information. This is an example of what your button can look like, but you'll want to customise this:

Most CRC users are also set up with the website builder mycreditrepairsite.com (Hosted by Weebly) Here's how you embed Billsby onto a Weebly site:



This is an example of what the checkout will look like on your website. You can change how this looks by going to **Settings > Configuration > Brand customization**

This is what the customer will first be introduced to, your products screen.



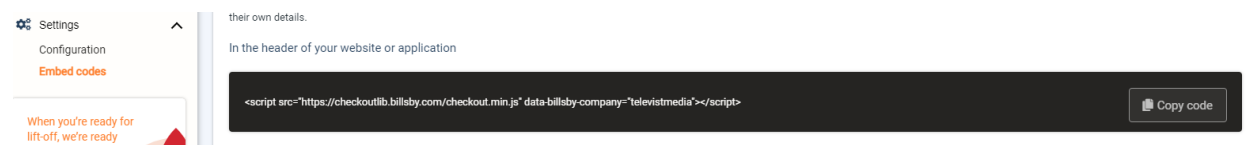
This is the final step of the checkout, where the customer will input their card details. Once they

have clicked the terms of use button, they'll click the pay button and be automatically subscribed to you:

You'll want to head to <https://www.billsby.com/resources/tools/buttongenerator/> to create a button, and once you're happy click **get codes**.

In your site builder, wherever you want the button to be, drag out an **embed codes** text box from the side panel, this will be your hub for the codes. There'll be three codes you need to put in on separate lines.

For the first code, you want the one in your Billsby account found here:



For the second code, you want the top most code from the button generator:

Subscribe Button

```
<a href="javascript:void(0)" class="billsbybutton-saiu" data-billsby-type="checkout"><strong>Subscribe today</strong><br />Seven day free trial on all plans</a>
```

For the last code, you want the style code, which is the long piece of code at the bottom - you want everything in the black box:

You'll need this code **in addition** to the header code we ask you to include in the Billsby Control Panel. You can put it either before or after.

```
<style type="text/css" media="screen">
.billsbybutton-saiu {
  display: inline-block;
  text-align: center;
  border-width: 1px;
  border-style: solid;
  text-transform: uppercase;
  text-decoration: none;
  line-height: 1.1;
  font-weight: normal;
  font-family: sans-serif;
  color: #ffffff;
  font-size: 12px;
  background-color: #73B10E;
  background-image: -webkit-linear-gradient(top, #76b60e 0%, #86cc15 48%, #73B10E 49%, #73B10E 82%, #84c915 100%);
```

All three of these codes need to be placed on separate lines within the single Embed code box on your site.

Please do be aware that you'll need to make two more changes to make sure the button is exactly as you like. In the style code section you'll see **text decoration: none** and **color: #ffffff**. To make sure you get everything correct, put a space after these two phrases (and before the ;) and type !important.

And just in case that's a lot to take in, we also have created a video tutorial for you! Check that out [here](#).

We also understand there's other website builders, however most website builders require modifications to the code.

Here are the guides for some of the other website builders:

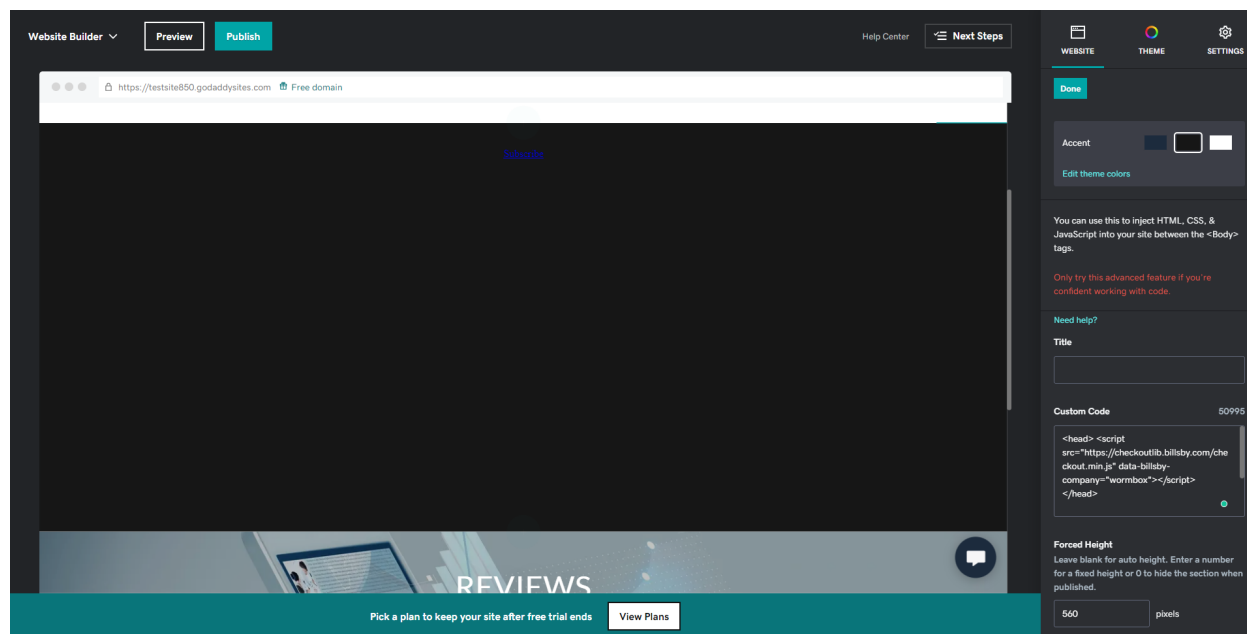
Wix: <https://support.billsby.com/docs/wix>

Wordpress : <https://support.billsby.com/docs/wordpress-plugin>

GoDaddy: See below

To get started, navigate to the page you want to embed the Billsby checkout on inside the edit mode of your GoDaddy site builder and click + **Add a section**. Then search for **HTML** in the search bar, at the top of the right-hand menu, and select it to add it to the page.

Once you have an **HTML** section on your page, copy the code from the Billsby checkout embed code menu (you can find this in **Settings > Embed code**) and paste it into the **Custom code** field in the GoDaddy right-hand menu. Do remember, you should always open/close out your header/body of the embed code so that it is recognised correctly.



GoDaddy places some limitations on third-party HTML code and does not support the use of modal pop-ups.

To work around this, we must adjust the **Forced height** of your **HTML** section to be **560 pixels**, to accommodate for the size of the Billsby checkout once it opens.

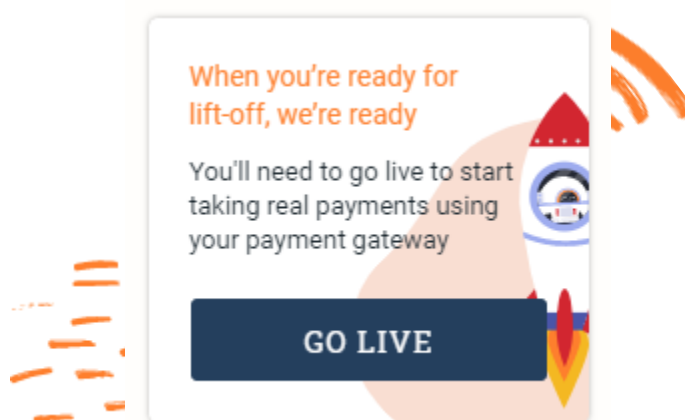
If you do not adjust the **Forced height** of the section, the height will not automatically adjust correctly because of the limitation, and the section will be too small for the checkout to be fully visible within it. When you use the embed code provided in your Billsby account, it will show up as a text link. To style it as a button you will need to add some additional code on your end or use our [button generator](#).

If you don't have a website, you can also use our landing page [Billsby Pages](#) which is completely free to use.



Going Live

If you're in the Pre-live state you won't be able to take real payments from customers, and you won't be able to save real customer card details, we'll only use the test gateway. You'll see this icon on the left of your Billsby account:



You'll want to click this button, and you'll be directed to the Live page. The first thing you'll see is a checklist of items that you need to complete. It's important to note, that all of your current test customer data (Names/Addresses/Emails) will be erased once you [Go Live](#). If you've used any real customer data as a test, make sure to take a note of them somewhere so you can re-enter.

✔ Create at least one product, plan and cycle	
✖ Link at least one payment gateway to Billsby	✖ Fix this
✖ Ensure all currencies are assigned to a payment gateway	✖ Fix this

The first step correlates to **Products > Products, Plans and Cycles** in which you will need to create a product, and then click Add a plan on the product and follow through the steps. If you've already got one or more set up and you're happy you move on to payment gateways.

You can add a payment gateway by going to **Settings > Configuration > Payment Gateways**. Here you'll want to have an account with one of the payment gateways we support. If you're still looking for one to use, you can see our recommendations. You don't need to link a merchant account, only a payment gateway is needed for use with Billsby. Click the plus symbol of the gateway you wish to use and you'll be presented with the information you need to log-in/sync with that gateway. Once done, make sure to click **Add new payment gateway**.

Lastly, you'll head to **Settings > Configuration > Currencies**. Click the box next to your default currency, and assign the gateway you just added. Your checklist is now done!

If you scroll down the **Go Live** page, you'll be prompted to enter your card details. When you go live with us, you will get a one month free trial, and one month later you will then be charged a \$35 charge which will give you \$15,000 in transaction value (if you make more than \$15,000 in a month there will be an overage charge of 0.4%).

Currently, we only have 3 types of card we accept: **Visa, Mastercard and American Express**. Now when you're ready, click the button at the bottom of the page.

What happens when I go live?

We'll start using your real payment gateways for subscriptions and you'll be able to sign up real customers. Your embed code and API keys will not change. We will delete your test customers, subscriptions, invoices, credit notes and logs. We won't delete your products, plans, cycles or settings.

GO LIVE WITH BILLSBY

Now that you're live, you're ready to start taking payments and letting us do all the work!

Billsby Support

We understand that Billsby isn't the simplest thing to set-up, so we have a team of support agents ready to help you.

The majority of your questions can be answered on our support site over at <https://support.billsby.com/>

Sometimes you just want to double check something. You can speak to our live clients at any point when you're in your Billsby account by clicking the intercom button in the bottom right hand side, and then click **Send us a message**.

Billsby doesn't offer over-the-phone support, but we're happy to get on a **Zoom** call with you. Just talk to one of our representatives via the feature described above, and we'll extend an **onboarding Zoom** call to you. You'll be emailed a join **Zoom link** and confirmation of time. In the email you'll click the join **Zoom link** to connect with the representative at the scheduled time.

Please make sure you have your client support model in place. This includes providing your details to your subscribers so they are able to ask you any questions about your product or even if needed cancel their current account, we do not have the ability to do so. Billsby will only be able to support your account and accommodate any of your needs.

