

The Credit Hero's Guide To Setting Up Automated Recurring Payments For Your Clients With



A Quick Start Guide

***Important: See the section about “Getting started, for a special link to receive a Billsby account that has no monthly fee and \$10,000 in processing for free. Signing up from that special link is the only way to get this offer.**

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Note From Daniel (Why I Wrote This Guide)

Hey Credit Hero!

My goal as founder of Credit Repair Cloud is to help you grow your profitable credit repair business, so you can fire your boss, quit your 9-5, change lives, and someday join our Millionaires Club. I'm here to help you do exactly that.

Years ago, I launched Credit Repair Cloud from nothing. It wasn't easy and I made a ton of mistakes, but I never gave up. And through that I learned that any business really can launch from close to nothing -- especially credit repair. Since then, I've had the privilege of helping thousands of people, just like you, to launch their own business from nothing. I call this philosophy, "The Bootstrappers Mindset." When you adopt my bootstrapper's mindset you're able to grow your profitable business and get paid in the most efficient and affordable way. That's what this guide is about.

If you're just getting started with your credit repair business, I also recommend signing up for our Credit Hero Challenge. During the challenge you'll earn your credit repair certification, enjoy daily coaching, learn proven processes, and embrace your bootstrapper's mindset - all for less than you'll spend taking your family out to McDonald's. It's the greatest program we've ever created. So if you haven't completed the challenge yet, sign up now at CreditHeroChallenge.com.

I wish you the best of success with your business!



Daniel Rosen

Founder and CEO of Credit Repair Cloud

daniel@creditrepaircloud.com

What is Billsby?

Billsby is a Recurring Billing & Subscription Management Software that automates the monthly charges from your client's credit/debit cards. I recommend Billsby, because their plan contains no monthly subscription fee and a fixed transaction fee of 0.4% with no hidden charges. This makes Billsby an easy and affordable method of launching your recurring revenue business. In comparison, other payment platforms are complicated and expensive, with some resulting in costs of thousands per month! Instead, Billsby is the best way to get started with the tools you need with a minimal expense.

***IMPORTANT NOTE:** You may notice old documentation in Credit Repair Cloud mentioning "Chargebee." However, Chargebee recently changed their business model to enterprise which resulted in severely spiked fees and they began rejecting CRC users. We no longer recommend Chargebee. As an alternative we suggest Billsby as your super simple and more affordable option.

Why Monthly Subscription Billing?

The monthly subscription billing model is the easiest and fastest way to grow your revenue. With this model, your client's credit/debit card is charged a fee every single month until they cancel. The philosophy behind a monthly recurring revenue model) is as follows;

If you...

- Charge an affordable price
- Give awesome service (so your clients continue to pay you)
- And add a few more clients each month
- Your revenue will continue to grow month after month!



If you're just getting started, this is a much faster and more reliable way to scale your business than pay-per-delete or any other complex business model. In every other model (except the monthly subscription billing model) you, as the business owner, spend most of your time chasing money instead of building your business. As tempting as it may be to reinvent the wheel, I recommend sticking with proven modes that work (and do your experimenting later). To run projections and calculate pricing and revenue, you can use our credit repair business calculator www.creditrepaircloud.com/calculator.

Getting Started With Billsby

Before you begin, it's important to understand that Billsby is a third party vendor and is not owned by CRC or partners with. Billsby has their own own customer service and support. When you choose to use them, you are doing so independently as a separate tool for billing your clients.

If you choose to use Billsby, you'll connect it to your gateway (which connects to your merchant account) as explained below. It's important to know that Billsby does not collect or hold your money. It's simply a software. The actual collecting of money and approving of charges all happens between your payment gateway and your customer's bank. Billsby simply facilitates the automation.

These instructions will guide you through the most common and simple setup for a recurring revenue credit repair business.

START HERE:

To charge client's credit cards for credit repair, **you must have a merchant account that allows for processing credit repair services**. You also **must have an Authorize.net "gateway" account**. Sign up for a merchant account for credit repair at www.CreditRepairCloud.com/merchant. Once you begin the process, the merchant account provider will assist you with getting your Authorize.net gateway.

**As tempting as it may seem, you cannot use PayPal, Stripe, Square or any other popular billing service for credit repair. It is against their Terms of Service. No matter what you name your business, they will eventually discover your violation and will ban you, freeze your money (and you may never get it back). Do not take this risk. You cannot use an Authorize.net "merchant account" -- only the Authorize.net "gateway" mentioned above, which your merchant account provider will help you to secure. You must have a merchant account authorized for credit repair to operate your business properly.*

How to get \$10,000 in processing for FREE!

Sign up for your Billsby account at the special link for Credit Repair Cloud customers <https://www.billsby.com/landing/credit-repair-cloud>. We've asked Billsby for special pricing for our customers - you'll only pay a 0.4% transaction fee - there are no monthly fees and no setup

fees. **And if you sign up from this special link, you can make your first \$10,000 of revenue without paying Billsby a cent.**

Setting Up a Subscription Product, Plan & Cycle

If you're just getting started and not sure what to charge, our most successful credit repair business owners charge an average range of \$59 to \$99 per month (depending on your market. I recommend starting on the lower end at first so that you keep it affordable for your first clients. As you grow, you can easily add additional plans for future clients).

1. Log into your Billsby account at <https://app.billsby.com>
2. When you first login to your Billsby account, you have the option to follow the Getting started pathway. For this example, we are going to "skip get started"

The screenshot shows the Billsby app interface. At the top, a welcome message says "Welcome to Billsby, Alex! Just two more things to do to get started. First, we're going to create your first product and plan and then we're going to pick your branding settings." A "Talk to us" button is in the top right. On the left, a sidebar menu lists "Getting started" (with sub-items: Create your account, Company details, Product and plan, Branding settings), "Dashboard", "Customers", "Subscriptions", "Invoices & credit notes", "Products" (expanded to show "Products, plans & cycles", "Add-ons", "Allowances", "Discounts and coupons", "Logs", "Reports", "Zones", "Coupons"), "Help & docs", and "Alex". The main content area is titled "Products, plans and cycles" and includes a "CREATE YOUR FIRST PRODUCT AND PLAN" button. It also features a table of subscription options for different products (HEAT BOX, VEGAN BOX, VEGAN BOX) with plans for one person and two people, each with monthly and annual payment options. Below this, there's a section "How do other companies structure their products, plans and cycles?" with examples like Netflix, Dollar Shave Club, Equinox, Intercom, Amazon Prime, and Spotify. A red circle highlights the "SKIP GET STARTED" button in the bottom left corner.

3. Click the "Products" icon and navigate to "Products Plans & Cycles" in the drop down menu. This will take you to the Products, Plans & Cycles page.

Billsby

Welcome to Billsby, Alex!

Just two more things to do to get started. First, we're going to create your first product and plan and then we're going to pick your branding settings.

Talk to us

Dashboard

Customers

Subscriptions

Invoices & credit notes

Products

Products, plans & cycles

Add-ons

Allowances

Discounts and coupons

Logs

Reports

Zapier

Settings

When you're ready for lift-off, we're ready

GO LIVE

Products, plans and cycles

Let's create your first product and plan!

of your customers subscribes to a plan - like the 'Basic Plan' or the 'Professional Plan'. Plans can have multiple cycles every month, or every year. Your product is a group of plans, so if you sold dog walking, your product would be 'Dog walking', your plans might be 'Once a week', and 'Twice a week', and your cycles might let people pay each week or each month. If in the future you add Dog Sitting, that'd be another product.

To get started, create your first product, or take a look at some more examples below.

CREATE YOUR FIRST PRODUCT AND PLAN

How do other companies structure their products, plans and cycles?

Companies below aren't Billsby customers, but you can click on them to see how they'd structure their products if they were.

Netflix

DOLLAR SHAVE CLUB

EQUINOX

INTERCOM

amazon prime

Spotify

Product

Netflix is a video streaming service in more than 100 countries - they'd want one product per country so users get the right plan. Users can only have one plan at a time.

Plans and cycles

Netflix has three different tiers of service which correspond to different features. They can use feature tags to differentiate between this in app. All the plans are on a monthly cycle.

Extra features

Netflix could use coupons to offer extended trials or sell gift cards in store, with add-ons they could sell extra services over time and plan actions could trigger emails and marketing.

Help & docs

Credit Repair

Alex

- Choose the 'Create Your First Product And Plan' button - in Billsby, products are groups of plans your customers can subscribe to. All the plans within a product have the same currency and share other settings and customers can only switch between plans within the same product. We'll just create one for now.

Billsby < Products, plans and cycles

Create a new product

It all starts here. All of your plans and cycles live inside a product.

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

2 Let us know what information to collect

3 Change your advanced product settings

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.

When you're ready for lift-off, we're ready

GO LIVE

Help & docs ...

Credit Repair ...

Alex ...

CREATE PRODUCT

- First, we need to give our product a name. We'll call it "Credit Repair". Put this in both the name and display name box. For the description, you could put something like "Credit repair services".

Billsby < Products, plans and cycles

Create a new product

It all starts here. All of your plans and cycles live inside a product.

1 Tell us the basics

Name: Credit Repair

Display Name: Credit Repair

Description: Credit repair services

Currency: US Dollar

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

2 Let us know what information to collect

3 Change your advanced product settings

Display name

The name we'll show your customers when referring to your product. We'll use this name in places like the Billsby Checkout, and in emails and invoices.

When you're ready for lift-off, we're ready

GO LIVE

Help & docs ...

Credit Repair ...

Alex ...

CREATE PRODUCT

6. Currency will already be set to US Dollar, and we want tiered plans, so you can leave both these settings be and go on to the second step.

Billsby

Products, plans and cycles

Create a new product

It all starts here. All of your plans and cycles live inside a product.

Tell us the basics

Name: Credit Repair

Display Name: Credit Repair

Description: Credit repair service

Currency: US Dollar

Product type: Tiered - the

Display name

The name we'll show your customers when referring to your product. We'll use this name in places like the Billsby Checkout, and in emails and invoices.

When you're ready for lift-off, we're ready

GO LIVE

2

3 Change your settings

CREATE PRODUCT

Help & docs ...

Credit Repair ...

Alex ...

7. On this step, we want to make sure people can only sign up with a US billing address. Choose the little pencil icon next to address, untick allow customers to use addresses anywhere in the world, then press add next to United States, and then hit Update Address Settings.

Billsby

Dashboard
Customers
Subscriptions
Invoices & credit notes
Products
Logs
Reports
Zapier
Settings

When you're ready for lift-off, we're ready
GO LIVE

Help & docs
Credit Repair
Alex

Products, plans and cycles

Create a new product

It all starts here. All of your plans and cycles live inside a product.

Tell us the basics

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

address and address validation

ADD A FIELD

Reorder fields

Change your advanced product settings

CREATE PRODUCT

Billsby

Dashboard
Customers
Subscriptions
Invoices & credit notes
Products
Products, plans & cycles
Add-ons
Allowances
Discounts and coupons
Logs
Reports
Zapier
Settings

When you're ready for lift-off, we're ready
GO LIVE

Help & docs
Credit Repair
Alex

Products, plans and cycles

Create a new product

It all starts here. All of your plans and cycles live inside a product.

Tell us the basics

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.

Billing address, shipping address and address validation

Require shipping address
We always require a billing address - if you require a shipping address, customers will also confirm where they would like you to ship things.

Allow customers to use addresses from the world

UPDATE ADDRESS SETTINGS
Cancel

ADD A FIELD

Reorder fields

Change your advanced product settings

CREATE PRODUCT

Billsby

- Dashboard
- Customers
- Subscriptions
- Invoices & credit notes
- Products
- Products, plans & cycles
- Add-ons
- Allowances
- Discounts and coupons
- Logs
- Reports
- Zapier
- Settings

When you're ready for lift-off, we're ready

GO LIVE

Help & docs

Credit Repair

Alex

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.

Address

Billing address, shipping address and address validation

☒ Require shipping address
We always require a billing address - if you check this box, customers will also confirm where they would like you to ship things.

☐ Allow customers to use addresses from anywhere in the world

Permitted countries

Determine which countries customers addresses can be in, and whether it is permissible as a billing or shipping address.

Country

United States

Add

UPDATE ADDRESS SETTINGS

ADD A FIELD

Reorder fields

3 Change your advanced product settings

CREATE PRODUCT

8. Go to the final step. Here, we just need to change the product visibility to 'Public'.

Billsby

- Dashboard
- Customers
- Subscriptions
- Invoices & credit notes
- Products
- Logs
- Reports
- Zapier
- Settings

When you're ready for lift-off, we're ready

GO LIVE

Help & docs

Credit Repair

Alex

< Products, plans and cycles

Create a new product

It all starts here. All of your plans and cycles live inside a product.

Tell us the basics

Let us know what fields to collect

Change your advanced product settings

Visibility

Public

BCC Email

james.stevens@billsby.com

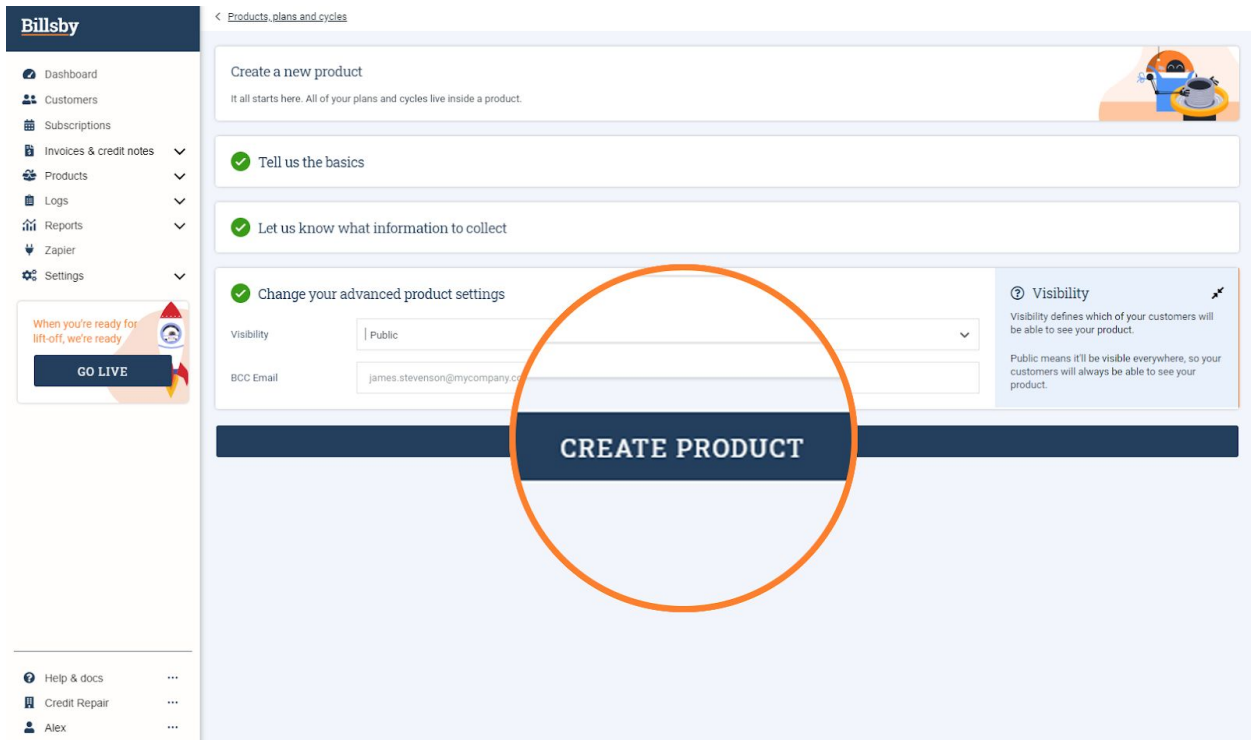
CREATE PRODUCT

Visibility

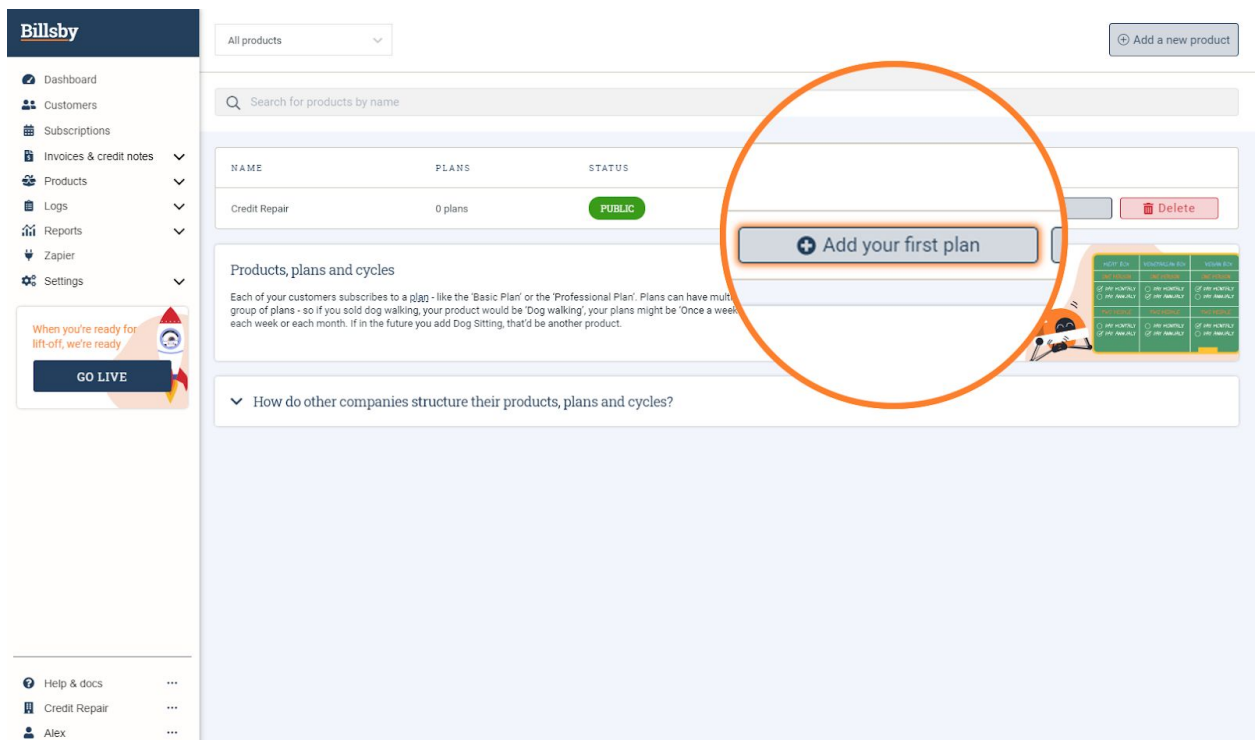
Visibility defines which of your customers will be able to see your product.

Public means it'll be visible everywhere, so your customers will always be able to see your product.

9. Finally, click 'Create Product'.



10. Now, we need to create the first plan for our product. Choose the 'Add your First Plan' button.



11. Give the plan whatever name you want. We'll call it 'Basic', but you might call it something like 'Bronze', 'Silver', 'Gold'... whatever you like. Use that exact same name as the display name and add a description to explain to customers what's included in the plan.

Billsby < Products, plans and cycles Create a new plan for Credit Repair

Create a new plan
Customers subscribe to one of your plans when they buy your product.

1 Tell us the basics

Name Basic

Display Name Basic

Description The basic credit repair plan

2 Pick a pricing model

3 Let us know what your plan costs

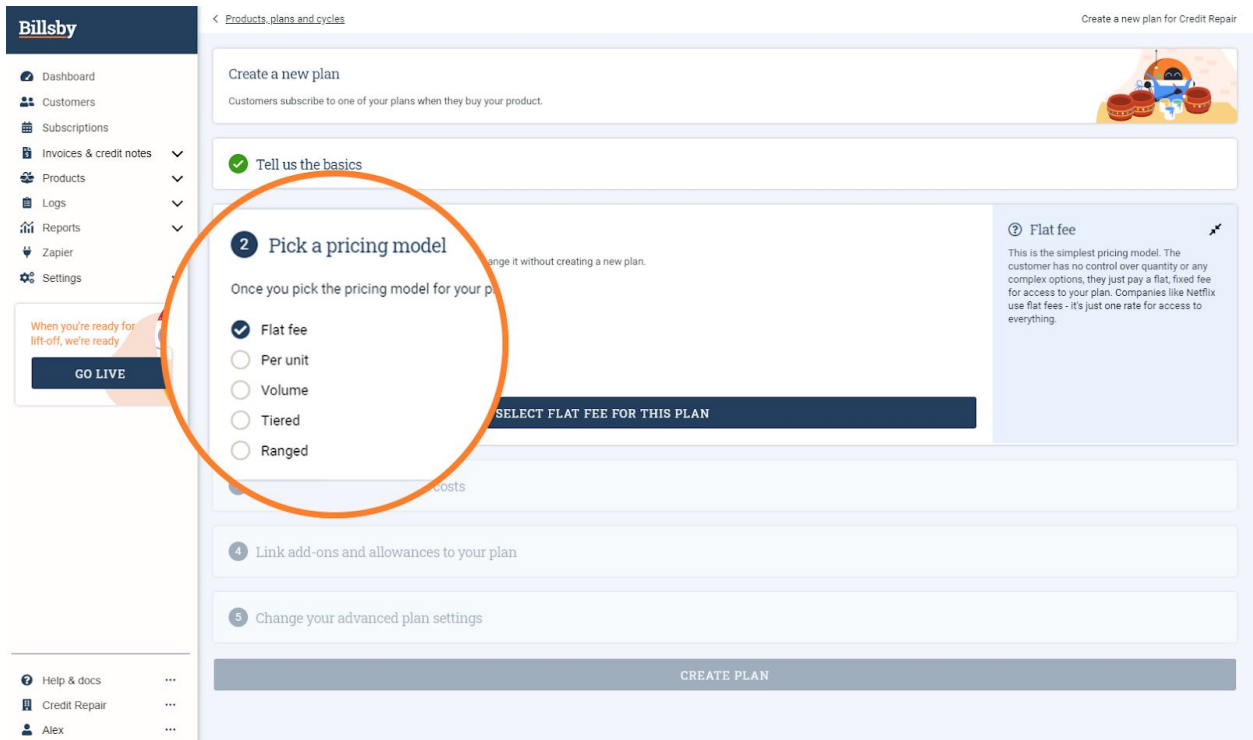
4 Link add-ons and allowances to your plan

5 Change your advanced plan settings

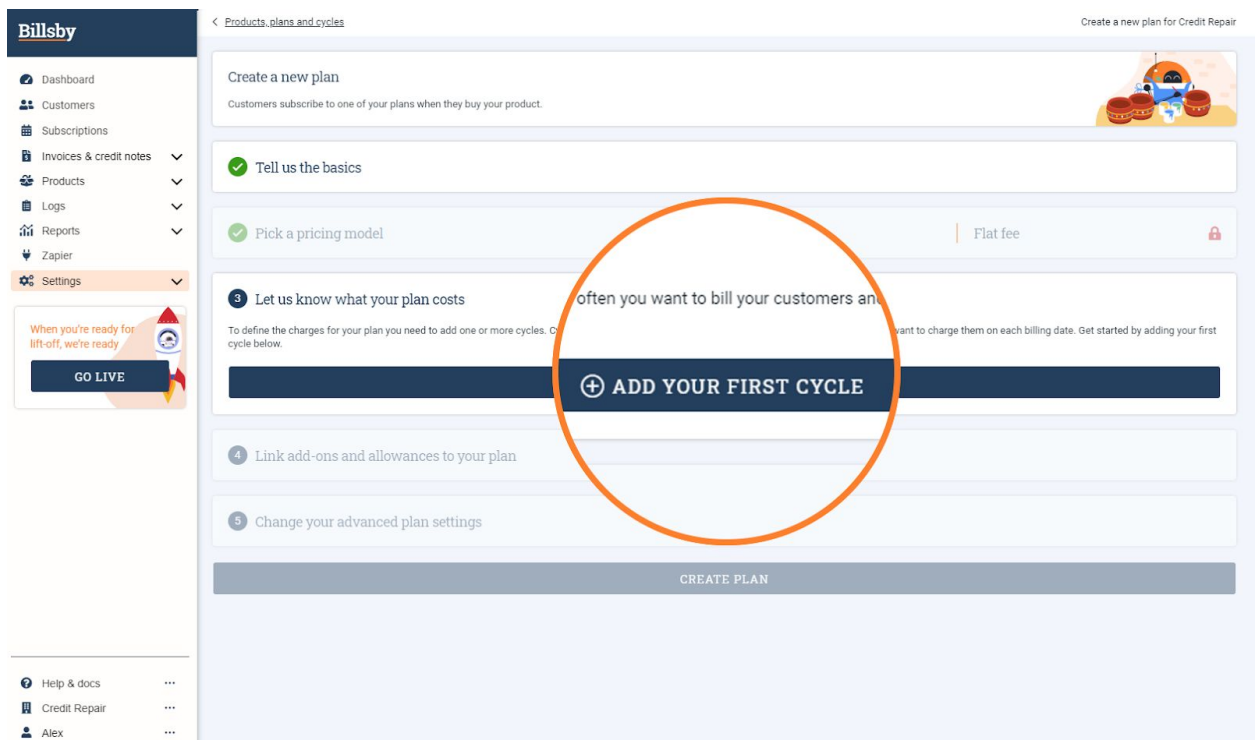
GO LIVE

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.

12. On the next screen, pick 'Flat Fee' as your pricing model - you can read about the more complex options at <https://support.billsby.com/docs/plans> if you want to make more advanced plans in the future.



13. Then go to the next screen and choose 'Add your first cycle'. Cycles are the frequencies in which customers are billed for the plan. Let's make a simple monthly cycle.



14. To do this, we've set the price to **\$99.00** every **1** month, making sure to fill in the price and frequency fields.

The screenshot shows the 'Billsby' dashboard with a sidebar menu on the left. The main area is titled 'Create a new plan' and includes a sub-header 'Products, plans and cycles'. The 'Adding a cycle' section is highlighted with an orange circle. It contains the following fields and controls:

- Price:** \$ 99
- Frequency:** every 1 month
- Free trial:** ☒
- Setup fee:** ☒
- Billing date:**
- Minimum term:** ☒ anniversary of the customer sign
- Visibility:** Public

At the bottom of the 'Adding a cycle' section are two buttons: 'ADD NEW CYCLE' (dark blue) and 'Cancel' (pink). To the right of the form is a 'Help' section with a question mark icon and text explaining the form fields.

15. If you like, you can add additional features to the cycle, such as a setup fee. However, keep in mind that if you do add a setup fee, it will be collected **in addition to** the first monthly payment.

16. Finally, set the visibility of the cycle to "Public" and click "Add New Cycle".

Billsby < Products, plans and cycles Create a new plan for Credit Repair

Create a new plan
Customers subscribe to one of your plans when they buy your product.

✓ Tell us the basics

✓ Pick a pricing model | Flat fee

Adding a cycle

Price \$ 59 every 1 month

Free trial ☐

Setup fee ☐

Minimum term ☐

Billing date

Minimum term

Visibility Public

Visibility

AD

4 Link add-ons and allowances to your plan

5 Change your advanced plan settings

GO LIVE

Help & docs
Credit Repair
Alex

When you're ready for lift-off, we're ready

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.

17. Then, just choose 'Create Plan'. We can skip steps four and five of the setup wizard as we don't need them.

Billsby < Products, plans and cycles Create a new plan for Credit Repair

Create a new plan
Customers subscribe to one of your plans when they buy your product.

✓ Tell us the basics

✓ Pick a pricing model | Flat fee

✓ Let us know what your plan costs

\$59 every month PUBLIC

ADD A CYCLE Reorder cycles

4 Link add-ons and allowances to your plan

5 Change your advanced plan settings

CREATE PLAN

GO LIVE

Help & docs
Credit Repair
Alex

When you're ready for lift-off, we're ready

18. Now we have our plan, we need to link our Authorize.net account so that customers can pay us. 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

19. Set the display name to whatever you want. We'll write "Payment Gateway" for this.

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:

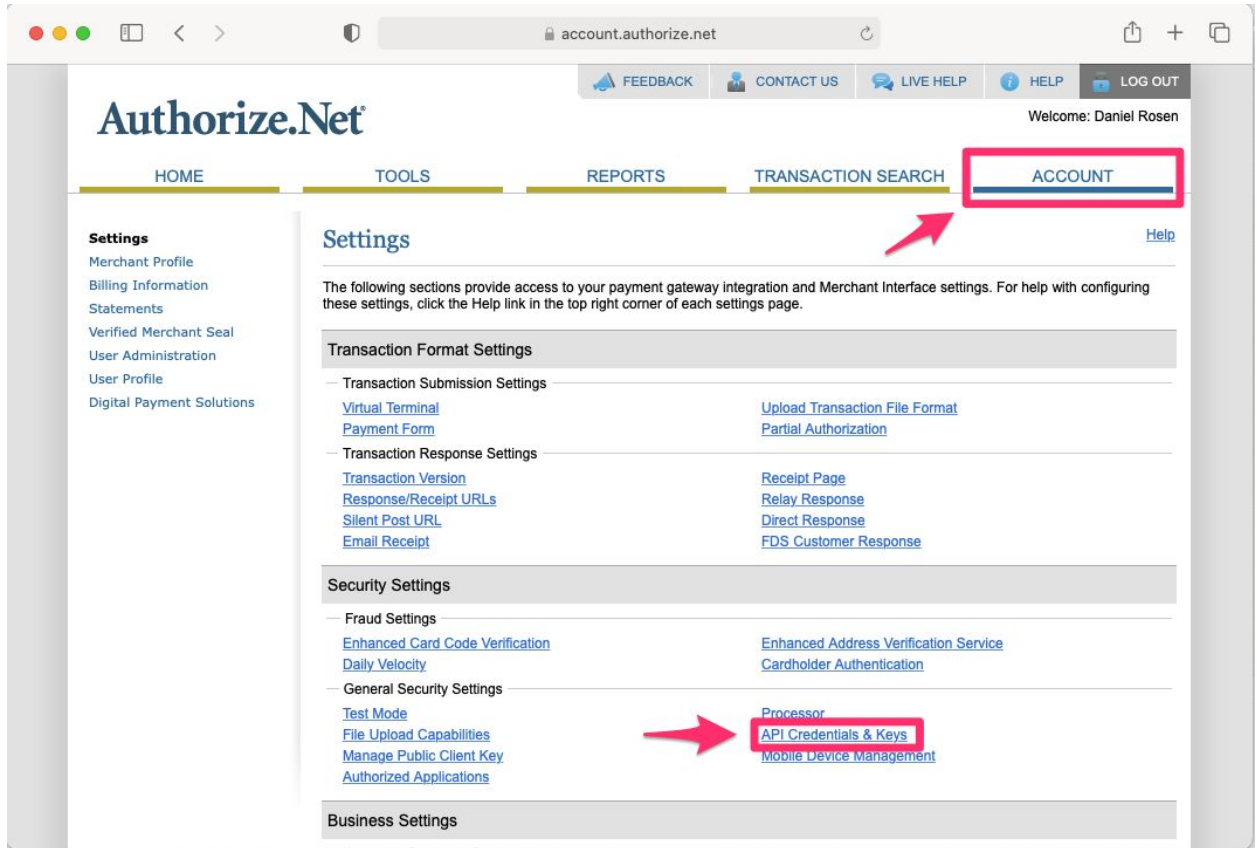
SAVE GATEWAY CHANGES Cancel

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.

20. 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."



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

account.authorize.net

Authorize.Net®

Welcome: Daniel Rosen

HOME TOOLS REPORTS TRANSACTION SEARCH ACCOUNT

Settings
Merchant Profile
Billing Information
Statements
Verified Merchant Seal
User Administration
User Profile
Digital Payment Solutions

API Credentials & Keys

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: 6rC... **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

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

The screenshot shows the 'My gateway' setup page for Authorize.Net. At the top left is the Authorize.Net logo and the text 'My gateway Authorize.Net'. At the top right is a 'Visit website' button. Below this is a paragraph of text explaining Authorize.Net. The form contains three input fields: 'Display name' with the value 'My gateway', 'API login ID' with the value 'Authorize.Net API login ID', and 'Transaction key' with the value '*****'. Each of these three fields is enclosed in a red rectangular box, and a red arrow points to the right of each box. At the bottom of the form is a large dark blue button labeled 'ADD NEW GATEWAY', which is also enclosed in a red rectangular box, with a red arrow pointing to the left of it.

23. Follow the final steps to save the gateway. You're done with setup!

Add Your New Client to a Subscription Plan

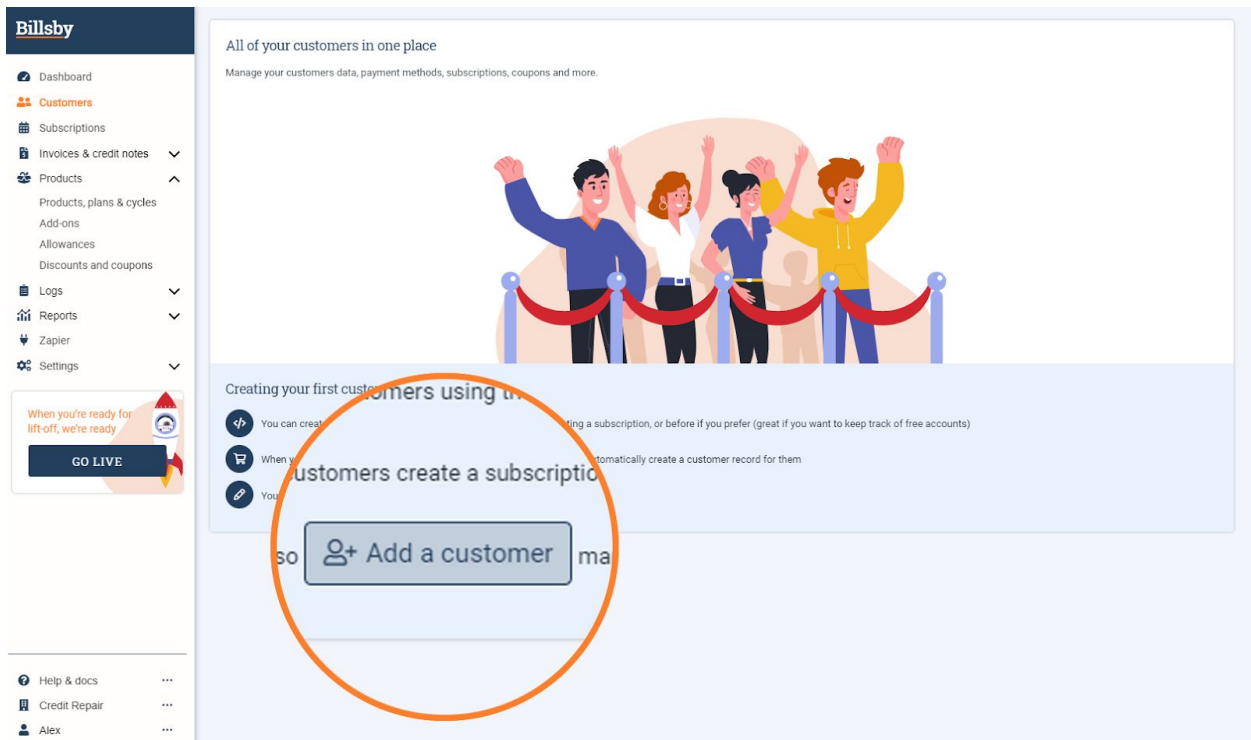
Before you add a real client to a subscription plan, we highly recommend that you take time to add yourself as your own client. This way you'll be able to test that it works, rather than experimenting with charging a real client. Understand there may be some errors to work out as you're setting things up (along with emails from your authorize.net gateway account to alert and guide you). Just be patient. With anything new, this is part of the learning process.

You may even need to reach out to Billsby support at some point. If so, try not to stress and instead remain calm and patient, trusting that it is all part of the process. Once you've confirmed it's set up and working properly for you as your test client, you can be confident it will work for your other clients too.

Please note: Most credit repair companies do not charge their clients until some work has been done, such as; importing reports and creating an audit or sending off a round of letters. The information contained in this guide is for educational and informational purposes only. It does not constitute legal advice, nor does it substitute for legal advice. Persons seeking legal advice should consult with legal counsel familiar with their particular situation as consumer credit laws vary by state.

Here's how to add yourself (and real clients later) to a subscription plan:

1. Navigate to “Customers” and click “ Add a customer” .



2.Create a customer

Here You can add a new customer, without a subscription, using the button provided in the top right hand corner of the page. You'll need to enter in the required customers details (Name, email and billing address) into the modal.

of your customers in one place

Manage your customers data, payment methods, subscriptions, coupons and more.

Creating your first customer

- You can create customers using the [Billby API](#) either as part of creating a subscription, or before if you prefer (great if you want to keep track of your customers before they create a subscription).
- When your customers create a subscription using [Billby Checkout](#), we'll automatically create a customer record for them.
- You can also [Add a customer](#) manually.

Create customer

When your customers create a subscription using [Billby Checkout](#) we will automatically create the customer record for them. If you prefer to create a customer manually you can do that here and then create a subscription for them.

Full name John Doe

Email address Johndoe@testma

Address

City Testington **Zip** 88901

State United States Nevada

CONTINUE

3. Collecting payment details

You can create the customer without payment details but we would recommend always attempting to add payment details at this stage. Otherwise you won't be able to add a subscription to the

customer later, without getting their payment details first.

The image shows a 'Create customer' form with two main sections. The left section, titled 'Collecting payment details', explains that payment information is required for successful charging and offers two paths: manual entry or sending a link. The right section, titled 'Manually input payment details', is highlighted with an orange circle and contains input fields for 'Cardholder name' (John Doe), 'Card number' (4111111111111111), and 'Expiration date' (11/2021). Below these fields is a 'CONTINUE WITHOUT PAYMENT DETAILS' button. The background of the form features an illustration of four people celebrating at a ribbon-cutting event.

4. Adding a subscription to a customer's account

Now, taking the customer we have just created, click "edit". This will take you into the customers

account and allow you to add and make changes to their subscriptions.

The screenshot shows the Billsby interface. On the left is a sidebar with navigation links: Dashboard, Customers (highlighted), Subscriptions, Invoices & credit notes, Products, Products, plans & cycles, Add-ons, Allowances, Discounts and coupons, Logs, Reports, Zapier, and Settings. Below the sidebar is a 'GO LIVE' button. The main area shows '1 customers' with a search bar. A green notification bar states 'Customer with payment details has been successfully created.' Below this is a table with columns: EMAIL, FULL NAME, CREATED ON, and STATUS. The table contains one row for John Doe (John Doe, 03 Dec 2020, ACTIVE). An 'Edit' button is circled in orange next to the row.

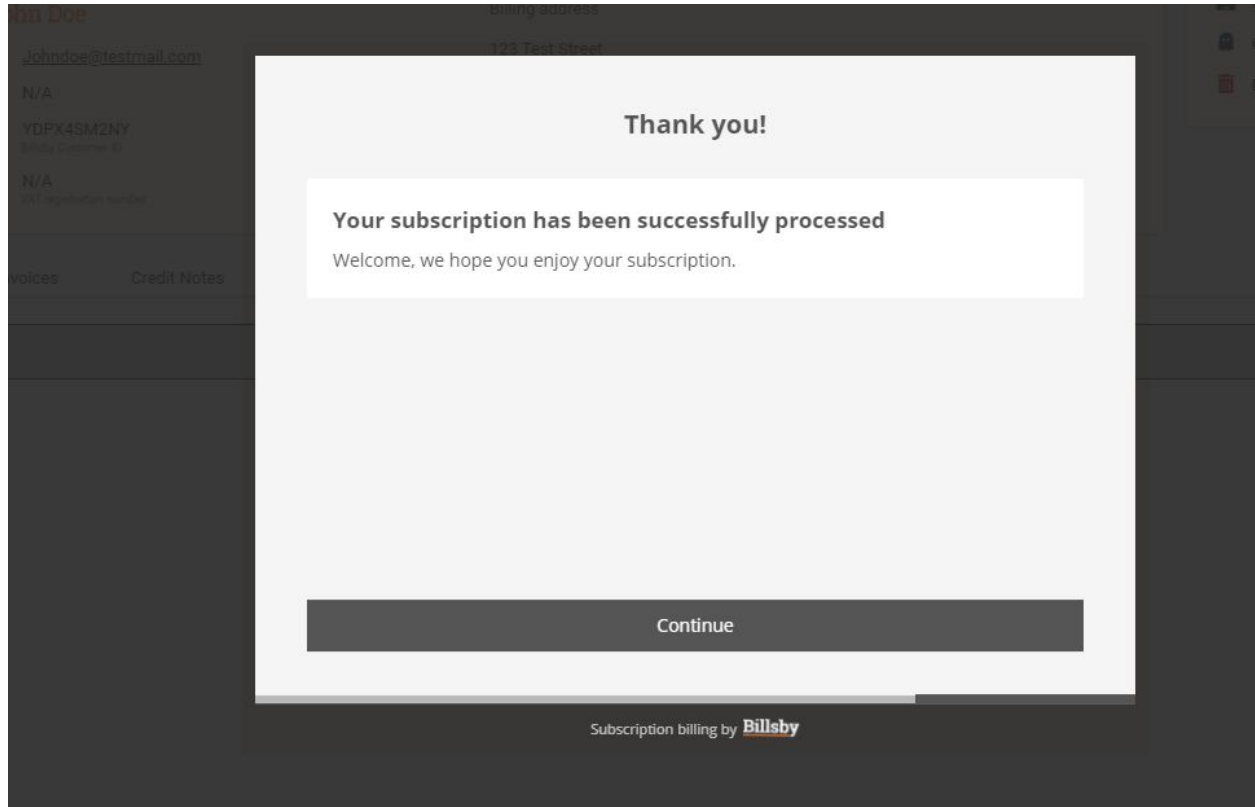
EMAIL	FULL NAME	CREATED ON	STATUS
John.doe@testmail.com	John Doe	03 Dec 2020	ACTIVE

5. Under the “subscriptions tab” click “ Add subscriptions”.

The screenshot shows the Billsby interface for a specific customer, John Doe. The sidebar is the same as the previous screenshot. The main area shows customer details: Customer since 03 Dec 2020, Lifetime value \$0, and Average value \$0 per month. Below this is a card with customer information: John Doe, John.doe@testmail.com, N/A, YDPX4SM2NY, and N/A. To the right of the card is a list of actions: Edit customer, Add subscription, Replace payment method, Capture one time charge, Clear personal data (GDPR), and Delete customer. Below the card is a tabbed interface with 'Subscription' selected. A large 'Add subscription' button is circled in orange.

Subscription	Invoices	Credit Notes	Cards
+ Add subscription			

6. Here you'll be able to see your Products, Plans and cycles that you created, and choose which you would like your customer to be subscribed to. If you've added all of the payment details correctly you should be able to checkout successfully and the subscription will be added to your customer.



Setting Up 1-Time Charges (Optional; For Pay-Per-Delete, etc).

As an alternative to monthly recurring, some credit repair companies charge per deletion. As mentioned earlier, we don't recommend this method as it's a much more complicated business to operate and scale. However, if you choose to go with a pay-per-delete model, there are 2 different ways you can run these charges through Billsby.

Get authorization in advance and run charges through Billsby

This is the easiest route for customers.

1. Create a new plan following the steps above in the section titled "Setting Up a Subscription Product, Plan & Cycle" and skip to step 4 for "Adding a new plan"), but make that new plan \$0 per month (You could call the plan "Pay-Per-Delete").
2. Customers will sign up and grant you a continuous payment authority on their card - meaning you can charge them whenever you'd like.
3. When it's time to make a charge, go to the customer in Billsby and choose 'Capture One-Time Charge'. You can specify both the amount of the charge, and the reason for it. If your merchant account supports it, you can also run credits this way.

Billsby will automatically issue invoices for all charges made using this method too, and they'll be included in your reporting.

The screenshot displays the Billsby web application interface. On the left is a sidebar menu with options: Dashboard, Customers (selected), Subscriptions, Invoices & credit notes, Products, Add-ons, Allowances, Discounts and coupons, Logs, Reports, Zapier, Settings, Help & docs, Creditrepaircloud, and Keenan. The main content area is titled '< Customers' and shows details for a customer named 'Keenan Jones'. At the top, it lists 'Customer since 02 Dec 2020', 'Lifetime value \$7', and 'Average value \$7 per month'. Below this, the customer's profile includes a name, email (N/A), phone (N/A), and a 'Billsby Customer ID' (DVR0NB795W). A 'Billing address' field is also present. On the right side of the customer details, there is a list of actions: 'Edit customer', 'Add subscription', 'Replace payment method', 'Capture one time charge' (highlighted with a red box and a red arrow), 'Clear personal data (GDPR)', and 'Delete customer'. At the bottom of the main content area, there is a 'Subscription' tab selected, with other tabs for 'Invoices', 'Credit Notes', 'Card', 'Emails', and 'Tax Validation'. A button labeled 'Add subscription' is visible at the bottom of the subscription section.

Common Billing for Pay-Per-Delete

Here's some examples of how much you might charge your customer for each type of deletion from their report as what we've seen from successful millionaire companies in our community. This is how you'd label them in "Allowances" as well.

- Late Payments - \$10
- Collections - \$50
- Charge Offs - \$50
- Repossessions - \$50
- Foreclosures & Short Sales - \$50
- Public Records (Bankruptcy, Child Support, ect.) - \$50

Getting checkout onto your website

There are two ways to get checkout onto your website so that customers can sign up for your plans.

1. The first is using **Embed Codes** (Recommended):
 - Requires a little more technical knowledge
 - Gives you a completely seamless experience - checkout floats on top of your existing website
2. The second is using a separate landing page, called a **Billsby Page**:
 - Requires no technical knowledge
 - Puts checkout on its own separate page at <https://yourcompany.subscription.page>

Either option is included with your Billsby plan, and you don't need to do either of them if you're just going to create customers manually in the control panel.

Option 1 - Embed Button Codes (Recommended)

For checkout, there are a number of variants of the Billsby embed button codes that you can use, that all invoke a slightly different user experience. The most basic checkout will take your customer through the entire checkout flow, following the steps outlined below:

1. Pick a product, plan and cycle
2. Add personal details
3. Custom fields
4. Payment
5. Summary and confirmation

To use the embed code you'll need to add two code snippets to your website. The first is the header code snippet, which should be inserted into the header of your website.

If you use <https://mycreditrepairsite.com/>, here's how you can add!

1. Login to <https://mycreditrepairsite.com/> and open your website editor
2. Generate a subscription button by going here. <https://www.billsby.com/resources/tools/buttongenerator/>. Customize color and button text how you like and then click "Get Code"

		Font Size	Font Color
Title	<input type="text" value="Signup Now"/>	<input type="text" value="22"/>	<input type="text" value="#FFFFFF"/>
Subtitle (optional)	<input type="text"/>	<input type="text" value="12"/>	
Theme Color	<div><div></div><div></div><div></div><div></div><div></div><div></div></div>		<input type="text" value="#006BCF"/>
Border Radius	<div><div></div></div>	<input type="text" value="50"/>	
Padding Multiply	<div><div></div></div>	<input type="text" value="1"/>	

SIGNUP NOW

Get code

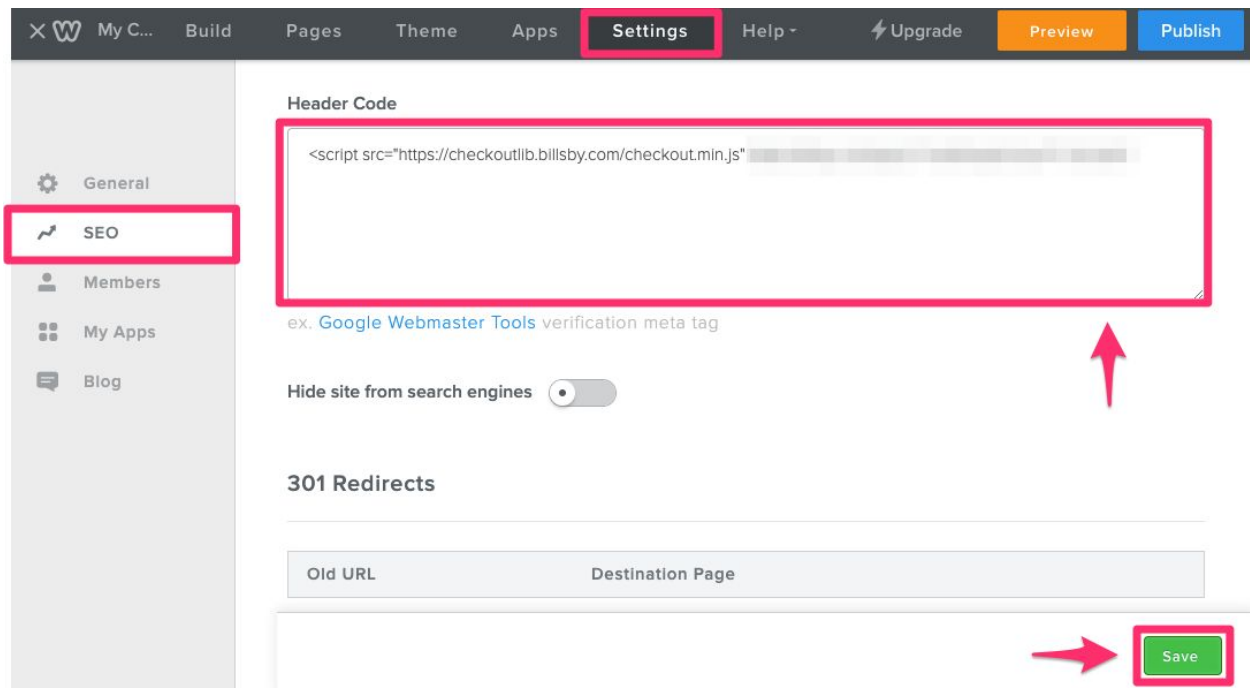
3. Grab your header button embed code from Billsby

Header code - Add this before the closing </head> tag in your HTML

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-ffkp {
  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;
}
```

4. Paste header code in Settings -> SEO -> Header Code in your <https://mycreditrepairsite.com/> site and then click "Save".



5. Grab your header embed code from Billsby. You can find your embed codes in Settings -> Embed codes in Billsby

Basic embed code

The basic embed code below will show the checkout and allow the customer to select between all of your products, plans and cycles. No customer information will be passed through, so the customer will have to enter all of their own details.

In the header of your website or application

```
<script src="https://checkoutlib.billsby.com/checkout.min.js" data-billsby="..."></script>
```

Copy code

Wherever you want the subscribe button to appear

```
<a href="javascript:void(0)" data-billsby="...">Subscribe</a>
```

Copy code

6. Paste header code in Settings -> SEO -> Header Code (*below code you already added*) and then click "Save".

Settings

SEO

Header Code

```
<script src="https://checkoutlib.billsby.com/checkout.min.js" data-billsby="..."></script>
```

ex. Google Webmaster Tools verification meta tag

Hide site from search engines ☐

301 Redirects


Old URL	Destination Page
---------	------------------

Save

7. Now navigate to webpage on your website you'd like to add checkout

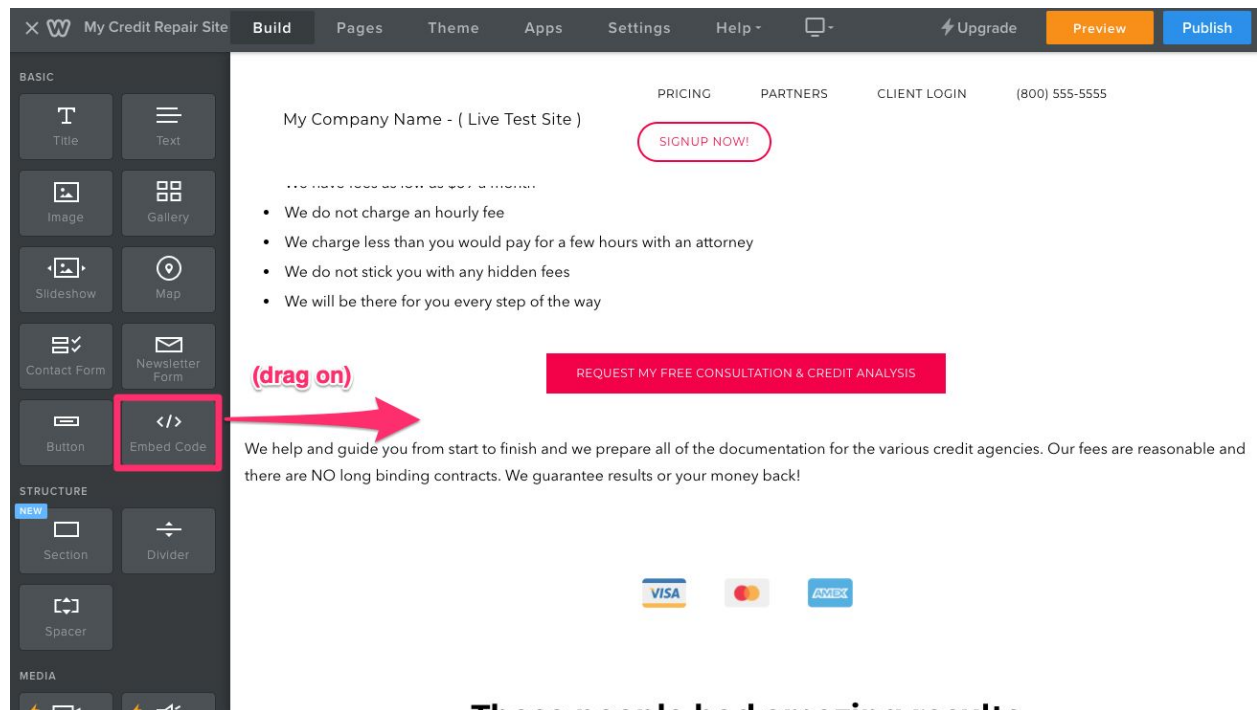
8. Copy "subscription button" code from Billsby

Subscribe Button



```
<a href="javascript:void:(0)" class="billsbybutton-fkp" data-billsby-type="checkout"><strong>Signup Now</strong><br /></a>
```

9. Add a HTML element to where you want the button on your website



The screenshot shows a website builder interface for "My Credit Repair Site". The top navigation bar includes links for "PRICING", "PARTNERS", "CLIENT LOGIN", and a phone number "(800) 555-5555". The main content area displays a "My Company Name - (Live Test Site)" header, a "SIGNUP NOW!" button, a list of services, a "REQUEST MY FREE CONSULTATION & CREDIT ANALYSIS" button, and a paragraph of text. The left sidebar contains a "BASIC" block menu with options like "Title", "Text", "Image", "Gallery", "Slideshow", "Map", "Contact Form", "Newsletter Form", "Button", and "Embed Code". The "Embed Code" option is highlighted with a red box, and a red arrow labeled "(drag on)" points to it. The "STRUCTURE" section shows "Section" and "Divider" options, and the "MEDIA" section shows "Image" and "Video" options.

10. Add “subscription button” code to HTML element

My Company Name - (Live Test Site)

Custom HTML

Edit Custom HTML

Position

- We have fees as low as \$59 a month
- We do not charge an hourly fee
- We charge less than you would pay for a fee
- We do not stick you with any hidden fees
- We will be there for you every step of the way

Click to set custom HTML

11. Publish new page with your new checkout button powered by Billsby.

My Company Name - (Live Test Site)

PRICING PARTNERS CLIENT LOGIN (800) 555-5555 SIGNUP NOW!

Pricing

Credit Education & Document Preparation

- We have fees as low as \$59 a month
- We do not charge an hourly fee
- We charge less than you would pay for a few hours with an attorney
- We do not stick you with any hidden fees
- We will be there for you every step of the way

REQUEST MY FREE CONSULTATION & CREDIT ANALYSIS

SIGNUP NOW

Option 2 - Billsby Pages

As mentioned above, if you don't have a website or if you're just looking to avoid using pesky embed codes - which can be a bit tricky with certain website builders, you can use Billsby Pages. You can sign up for Billsby pages here: <https://pages.billsby.com>

Billsby Pages allows you to set up a customised, subscription page that sits separately from your website. Head to <https://pages.billsby.com/> and in the top right-hand corner you'll see the

ability to 'Create and manage your page'. Here is where you can begin creating this subscription page.

Once you've found yourself in the login screen, you just need to add some of your Billsby account-specific details. Your Billsby URL is simply the subdomain you signed up with Billsby. You can find this by going back to the Billsby app and you'll see the URL will appear as `yourcompanyname.billsby.com` - you just need to copy your company name in there.

After you've set up a strong password, you'll need to paste your Billsby API key. This can easily be located from within your Billsby account, go to Settings > Configuration > API keys and webhooks. You then just use the 'copy code' button in the black box there. Paste that into the API key box, and you'll be taken to your Billsby Pages setup.

Billsby Pages will guide you through adding things like your branding and colours, your FAQ's as well as adding any guiding text for your customers.

Discounts and Coupons

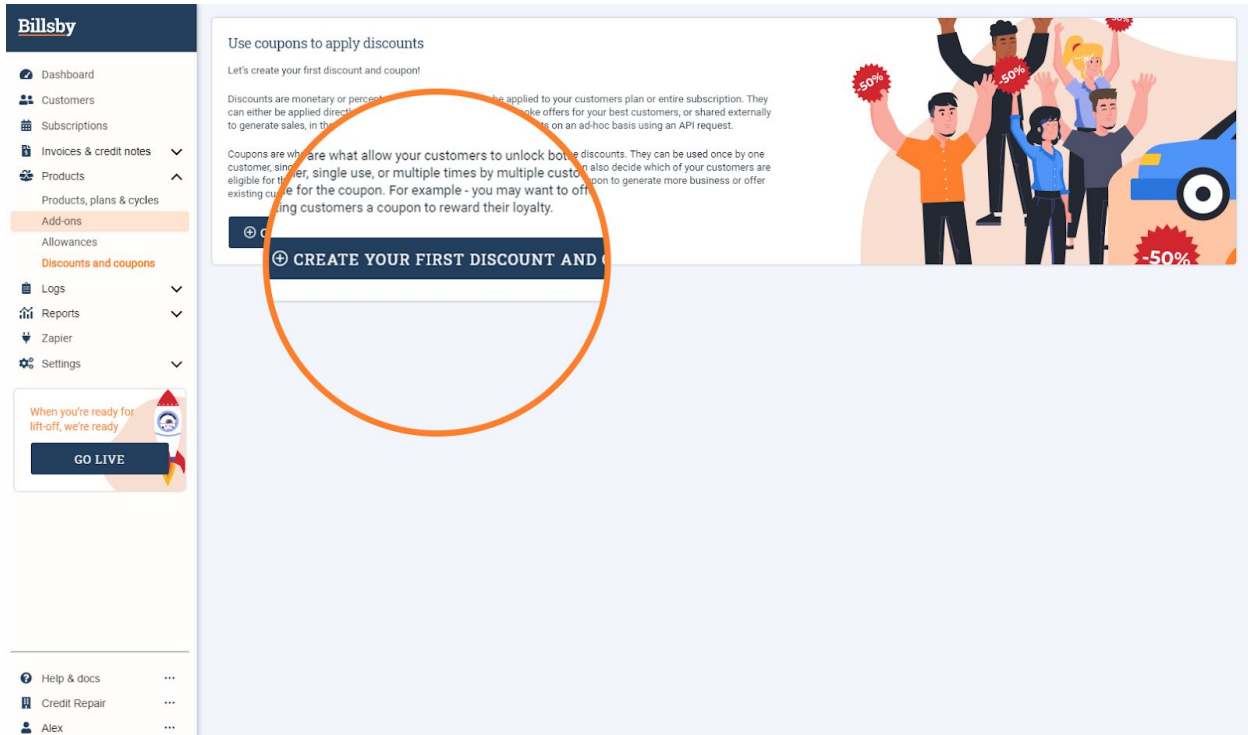
Create and manage unlimited discounts and coupons within Billsby. There are two types of discounts available:

- Percentage based
- Monetary based

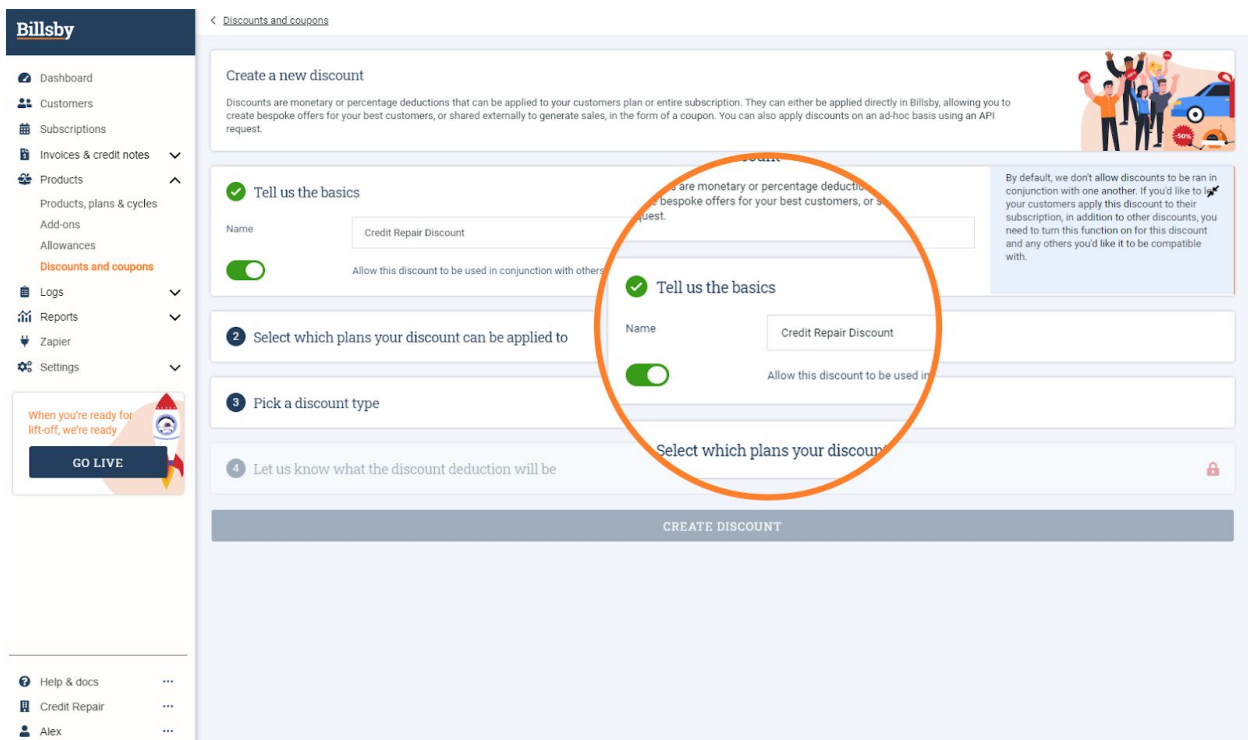
You can make discounts exclusive or stackable, limit them to new or existing customers, or make them available to everyone and limit them only to the base plan, or apply it to customers add-ons and allowances too.

Creating a new discount

To create the discount, you'll need to specify all the basic information about how you want your discount to work and which plans you want to apply the discount to. In the left-hand menu head to Products, plans and cycles > Discount and Coupons.



Once you've selected to create a new discount, the flow will take you through the steps of naming your discount as well as configurations such as the ability for the discount to be used in conjunction with other discounts. Here, you can also determine whether you wish for the discount to be able to be applied to all of your plans, or just a selected few.



Once you've determined whether the discount is monetary or percentage based you can outline how the discount will be taken from your customers' subscriptions.

Billsby

- Dashboard
- Customers
- Subscriptions
- Invoices & credit notes
- Products
- Products, plans & cycles
- Add-ons
- Allowances
- Discounts and coupons**
- Logs
- Reports
- Zapier
- Settings

When you're ready for lift-off, we're ready

GO LIVE

Create a new discount

Discounts are monetary or percentage deductions that can be applied to your customers plan or entire subscription. They can either be applied directly in Billsby, allowing you to create bespoke offers for your best customers, or shared externally to generate sales, in the form of a coupon. You can also apply discounts on an ad-hoc basis using an API request.

1 Tell us the basics

2 Select which plans your discount can be applied to

3 Pick a discount type

Once you pick the discount type, you can create a new discount.

☐ Monetary

☒ **Percentage**

PERCENTAGE FOR THIS DISCOUNT

4 Select which plans your discount will be applied to

CREATE DISCOUNT

Percentage

A percentage discount will deduct a percentage of the plan or subscription price away from the customers total subscription cost each cycle.

You'll be asked to decide whether the percentage should be deducted from the price of a customers plan or the price of their entire subscription when configuring the discount deduction.

Billsby

- Dashboard
- Customers
- Subscriptions
- Invoices & credit notes
- Products
- Products, plans & cycles
- Add-ons
- Allowances
- Discounts and coupons**
- Logs
- Reports
- Zapier
- Settings

When you're ready for lift-off, we're ready

GO LIVE

Create a new discount

Discounts are monetary or percentage deductions that can be applied to your customers plan or entire subscription. They can either be applied directly in Billsby, allowing you to create bespoke offers for your best customers, or shared externally to generate sales, in the form of a coupon. You can also apply discounts on an ad-hoc basis using an API request.

1 Tell us the basics

2 Select which plans your discount can be applied to

3 Pick a discount type | Percentage

4 Let us know what the discount deduction will be

This is where you let us know what percentage we should deduct when the discount is applied. Discounts will never 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

Let us know what the discount deduction will be

This is where you let us know what percentage we should deduct when the discount is applied. Discounts will never 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

Creating a new coupon

So once you've created your discount, you'll need a coupon to allow your clients to unlock it! Coupons are attached to discounts - so you can't have a coupon without a discount. As with the discount you'll need to define the coupons name, as well as the eligibility of certain customers.

The screenshot shows the Billsby dashboard interface. On the left is a sidebar with navigation links: Dashboard, Customers, Subscriptions, Invoices & credit notes, Products, Products, plans & cycles, Add-ons, Allowances, Discounts and coupons (highlighted), Logs, Reports, Zapier, and Settings. Below the sidebar is a 'GO LIVE' button. The main content area has a search bar for discounts and a table with the following data:

NAME	DISCOUNT ID	COUPONS	TYPE	DEDUCTION
Credit Repair Discount	OY8L2WT09V	0 coupons	Percentage	10% Entire subscription

Below the table is a section titled 'What are discounts and coupons?' with explanatory text. A red circle highlights a '+ Add a coupon' button located in the bottom right corner of the main content area.

You'll then determine whether it's a single use or multi use coupon. As it says on the tin, single use coupons can be used just once, by one customer. Once you've input how many of these coupons you want Billsby to generate, you'll receive a CSV download which will have a populated list of unique codes. Multi-use coupons can be used again and again, so they just need a unique name.

Billsby

< Discounts and coupons

Create a new coupon for Credit Repair Discount

Create a new coupon

Coupons are what allow your customers to unlock both short term and lifetime discounts. They can be used once by one customer, single use, or multiple times by multiple customers, multi use. You can also decide which of your customers are eligible for the coupon. For example - you may want to offer new customers a coupon to generate more business or existing customers to reward their loyalty.

✓ Tell us the basics

✓ Pick a coupon type | Multi use

3 Let us know how your coupons

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

Coupon code: CreditRepair10

Uses limit: 100

Expiration date: ☒

Discount length: Lifetime

2 Discount length

This is how long the discount will be applied to your customers subscription until it is removed.

Lifetime discounts will be applied to your customers account for the entire duration of their subscription. If your decide you need to remove the discount from the customers subscription you can do this directly in Billsby.

Fixed term discounts will be applied to your customers account for a specific period of time only. If you decide you need to remove the discount from the customers subscription early, you can also do this directly in Billsby.

GO LIVE

CREATE COUPON

Help & docs

Credit Repair

Alex

Adding 100% discounts

If you're looking to add a discount which removes the total value of the subscription, you just need to create a discount with a 100% deduction. You can utilise 100% discounts if your customers are looking to pay offline for their subscription. This means your clients will receive Billsby invoices reminding them of their invoice being due, and for you, you can just track the invoice within Billsby.

Advanced Invoicing

Billsby's advanced invoicing system moves your clients invoices away from just being a static PDF, into a tool that can be used to reduce churn, deflect payment failures and provide proactive customer service.

Within the advanced invoices your clients are sent, they can:

- Recharge the card on file instantly, without having to login, if their invoice is unpaid
- Replace the card on file from within the invoice modal, without having to login.
- Clients are able to reach your support team from within the invoice too (you just need to provide an email address within the invoice settings!)

What Happens When a Client's Payment Fails?

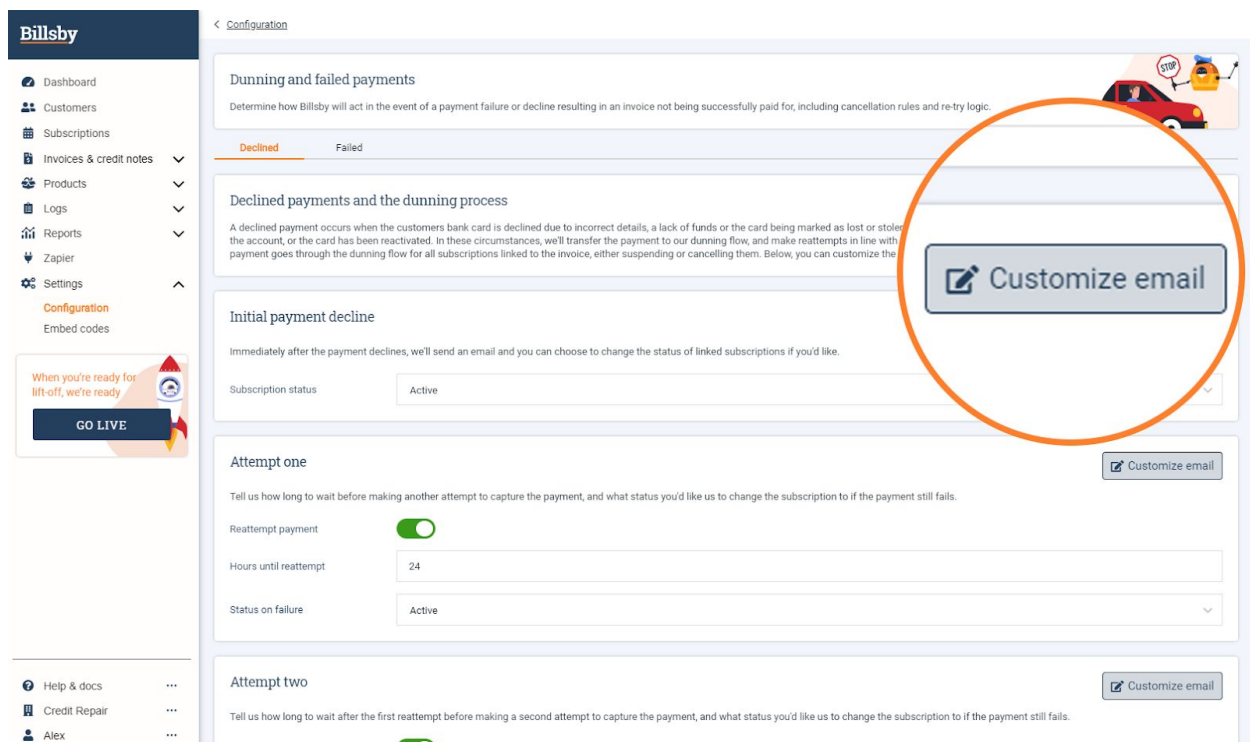
First - don't panic! If you're working with clients who have credit issues, you're going to have some payments fail. It happens to everyone because it's all part of doing business. When a payment fails, it's important to understand that most of the time, it's due to the client's bank declining the charge.

In the subscription billing world, they call this very very predictable occurrence 'dunning'. With platforms like Billsby, they have dunning and failed payment management systems built in.

This means that when your customer's payment fails, the transaction is entered into a 'dunning cycle' - where the system will attempt the payment from your client. By default, this will be 24 hours, then 48 and finally 72 hours after the failed payment. With each reattempt, the client will be notified and they will be requested to update their details (which they can do from within the Billsby invoice!).

Within Billsby, head to Settings > Configuration > Dunning and failed payments and you can edit the speed of Billsby's reattempts.

Another nifty feature is the ability to 'Customize' these dunning emails. You are able to edit the copy of this email, as well as the subject line to engage with your customers and add your brand's personality to these emails.



The screenshot shows the Billsby web interface. On the left is a dark blue sidebar with the Billsby logo and a menu including Dashboard, Customers, Subscriptions, Invoices & credit notes, Products, Logs, Reports, Zapier, and Settings. The Settings menu is expanded, showing Configuration and Embed codes. A 'GO LIVE' button is visible in the sidebar. The main content area is titled 'Configuration' and 'Dunning and failed payments'. It contains sections for 'Declined payments and the dunning process', 'Initial payment decline', 'Attempt one', and 'Attempt two'. Each section has a 'Customize email' button. The 'Attempt one' section is highlighted with an orange circle. The 'Attempt one' section includes a toggle for 'Reattempt payment' (which is turned on), a text input for 'Hours until reattempt' (set to 24), and a dropdown for 'Status on failure' (set to Active). The 'Attempt two' section is partially visible at the bottom.

After Billsby's final attempt at taking payment, you can choose how you'd like for the system to handle writing that invoice off. For example, you could have the invoice immediately written off after that final attempt.

Manually updating a customer card

With Billsby Subscriptions, you can replace your customer's card for them, if they've provided new information for example. This is a very flexible feature that the merchant can add card details from the merchant's dashboard and the customer can also add the card details from the client portal dashboard. In this step you can re-enter the same card or a new card.

Follow these steps to add the card details from the merchant's dashboard.

The screenshot shows the Billsby dashboard interface. On the left is a sidebar with navigation links: Dashboard, Customers (highlighted), Subscriptions, Invoices & credit notes, Products, Products, plans & cycles, Add-ons, Allowances, Discounts and coupons, Logs, Reports, Zapier, and Settings. Below the sidebar is a 'GO LIVE' button. The main content area is titled '< Customers' and displays customer information for 'John Doe'. At the top, it shows 'Customer since 03 Dec 2020', 'Lifetime value \$59', and 'Average value \$59 per month'. Below this is a card with the customer's profile picture, name, email (JohnDoe@testmail.com), phone (N/A), and address (123 Test Street, Testington, NV 89901, USA). A 'Billing address' section is also present. To the right of the card are action buttons: Edit customer, Replace payment method, Capture one time charge, Clear personal data (GDPR), and Delete customer. Below the card is a tabbed interface with 'Card' selected. The 'Card' tab shows a Visa card ending in 1111, with an expiry date of Nov 2021 and the name John Doe. A 'Replace' button with a circular arrow icon is highlighted with an orange circle.

From within the Billsby dashboard, go to Customers > and then hit the 'Card' tab on screen. Simply select the replace button, and you can update the details when the modal appears.

Processing a Refund

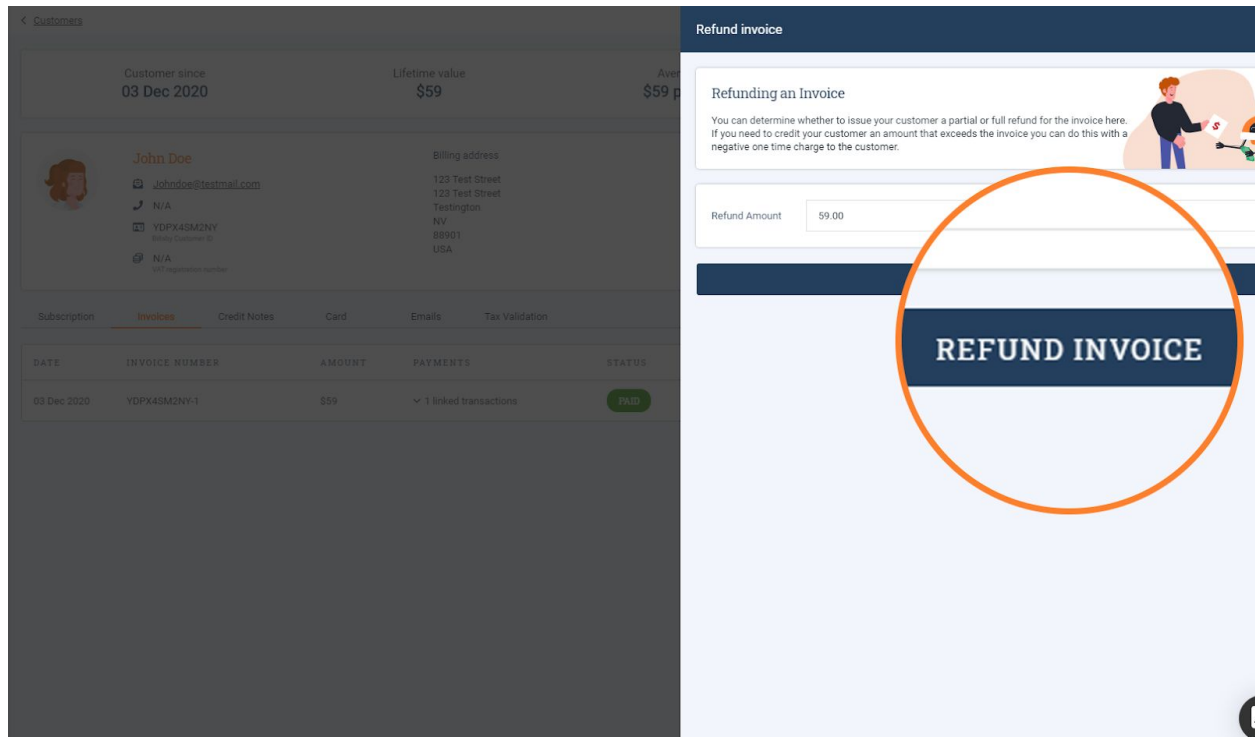
With Billsby you can easily process a refund directly from your account to your client. You don't need to go to your payment gateway account at all, you can do it directly in the Billsby web app.

Login to your Billsby account and choose "Customers" in the left hand side menu. Select the customer you want to initiate the refund for.

The screenshot shows the Billsby web app interface. On the left is a sidebar menu with options: Dashboard, Customers (selected), Subscriptions, Invoices & credit notes, Products, Add-ons, Allowances, Discounts and coupons, Logs, Reports, Zapier, and Settings. Below the menu is a 'GO LIVE' button. The main content area is titled '< Customers'. It displays customer information for John Doe, including contact details and billing address. A table shows the 'Invoices' tab with one invoice: 03 Dec 2020, YDPX4SM2NY-1, \$59, with 1 linked transaction and a 'PAID' status. At the bottom right, a 'Refund' button and an eye icon are highlighted with an orange circle.

DATE	INVOICE NUMBER	AMOUNT	PAYMENTS	STATUS
03 Dec 2020	YDPX4SM2NY-1	\$59	1 linked transactions	PAID

On the individual customer page you should navigate to the "Invoices" tab. Here, you'll find a "Refund" option for each individual invoice.



Once you click on “Refund”, a side modal will open where you’ll need to put in the refund amount. You can choose to refund the entire invoice amount or you can do a partial refund. Simply add the amount you want to refund and click on the “Refund invoice” button. If the invoice has been partially refunded in the past, you’ll only be able to refund for the remaining amount of the invoice.

Customers

Customer since
03 Dec 2020

Lifetime value
\$59

Average
\$59 p

John Doe

john.doe@testmail.com

N/A

YDPX4SM2NY

N/A

Billing address

123 Test Street

123 Test Street

Testington

NV

89901

USA

Subscription

Invoices

Credit Notes

Card

Emails

Tax Validation

DATE	INVOICE NUMBER	AMOUNT	PAYMENTS	STATUS
03 Dec 2020	YDPX4SM2NY-1	\$59	1 linked transactions	PAID

Refund invoice

This invoice has already been partially refunded and can now only be refunded a further 49.00 or less.

Refunding an Invoice

You can determine whether to issue your customer a partial or full refund for this invoice here. If you need to credit your customer an amount that exceeds the original amount, you can use a negative one time charge to the customer.

Refund Amount

49.00

REFUND INVOICE

If you want to refund more than the original amount of the invoice you should use the one-time charge feature and enter a **negative** value. This will credit the customer account with the value of the charge. You'll be able to see the credit note for this in the "Credit notes" tab.

Billsby

Dashboard

Customers

Subscriptions

Invoices & credit notes

Invoices

Credit notes

Products

Logs

Reports

Zapier

Settings

When you're ready for lift-off, we're ready

GO LIVE

Help & docs

Credit Repair

Alex

Search credit notes by customer name, email, customer ID or credit note number

DATE	CUSTOMER NAME	AMOUNT CREDITED	CREDIT NOTE NUMBER	STATUS	CUSTOMER ID
03 Dec 2020	John Doe	-\$10	YDPX4SM2NY-2	PAID	YDPX4SM2NY

AMOUNT CREDITED

-\$10

The refund will be automatically processed in Authorize.net.

Recording an Offline Payment (i.e.: Check, cash, etc, NOT on the client's credit card)

Customers who always pay offline

Using Billsby, you can track clients who are paying offline. If you're aware of a client who is looking to pay via cash/check, you can use Billsby to track their invoices.

Create the client's subscription as normal, signing them up to your standard plan. However, this time, during the checkout process you'll need to add a 100% discount for the plan (see the section above on discounts and coupons). This lets the system know that this customer will not be paying via card.

Instead, the customer will receive notification, as with any customer that the invoice is to be taken, and thus they will pay via cash/check as you've determined. It is then at your discretion to manage these payments, and Billsby will simply act as a notification system for these clients.

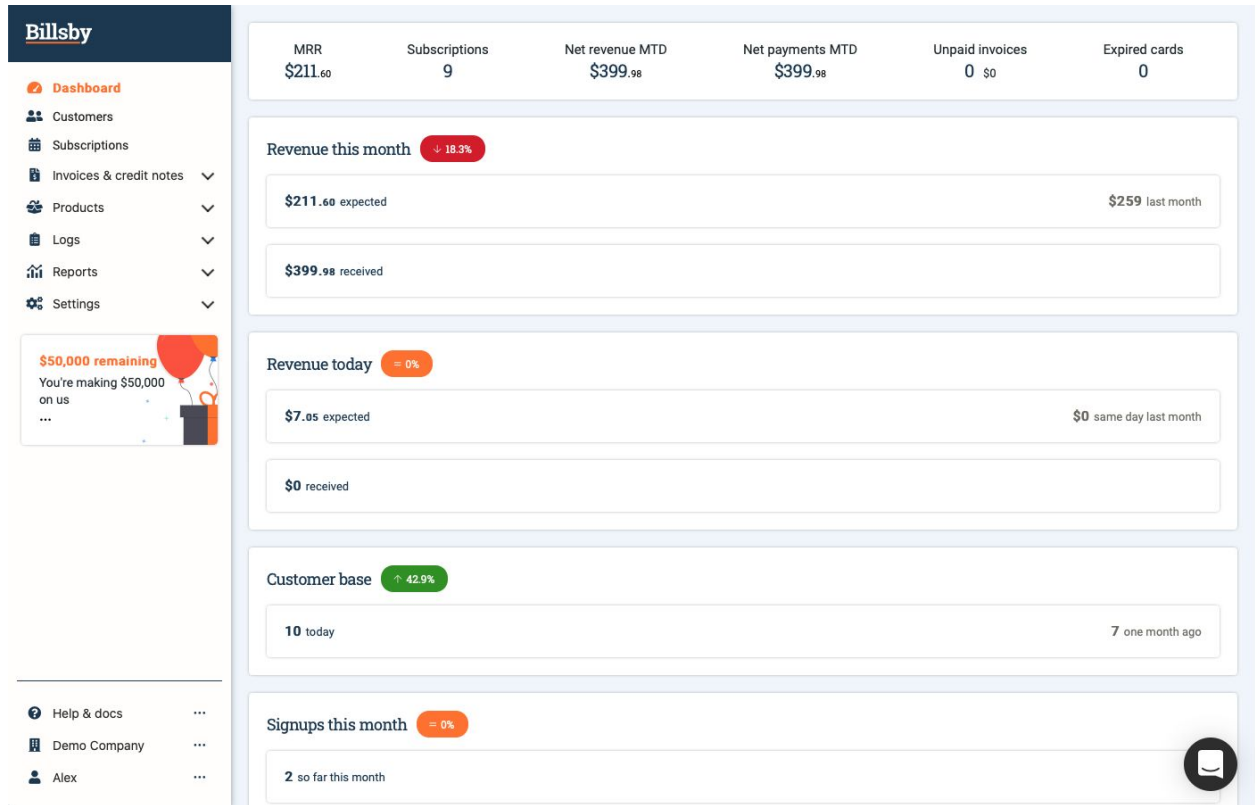
Billsby has told us they know it'd be more useful to be able to apply a credit in advance once you receive payment and not worry about creating a discount first, and that this feature is coming in early 2021.

Customers who have paid you for a failed invoice offline as a one-off

If a customer comes in to pay an invoice that has failed, after they were meant to pay by credit card you can mark it as paid offline so Billsby will stop attempting to take payment. To do this, choose the invoice and then choose 'Update status', finally, choose 'Mark as paid offline'. You can also choose 'Written off' to mark invoices as a write-off if you couldn't recover payment.

Sales Analytics

Dashboard - You can view an overview of your business revenue by clicking the "Dashboard" button on the left side menu.

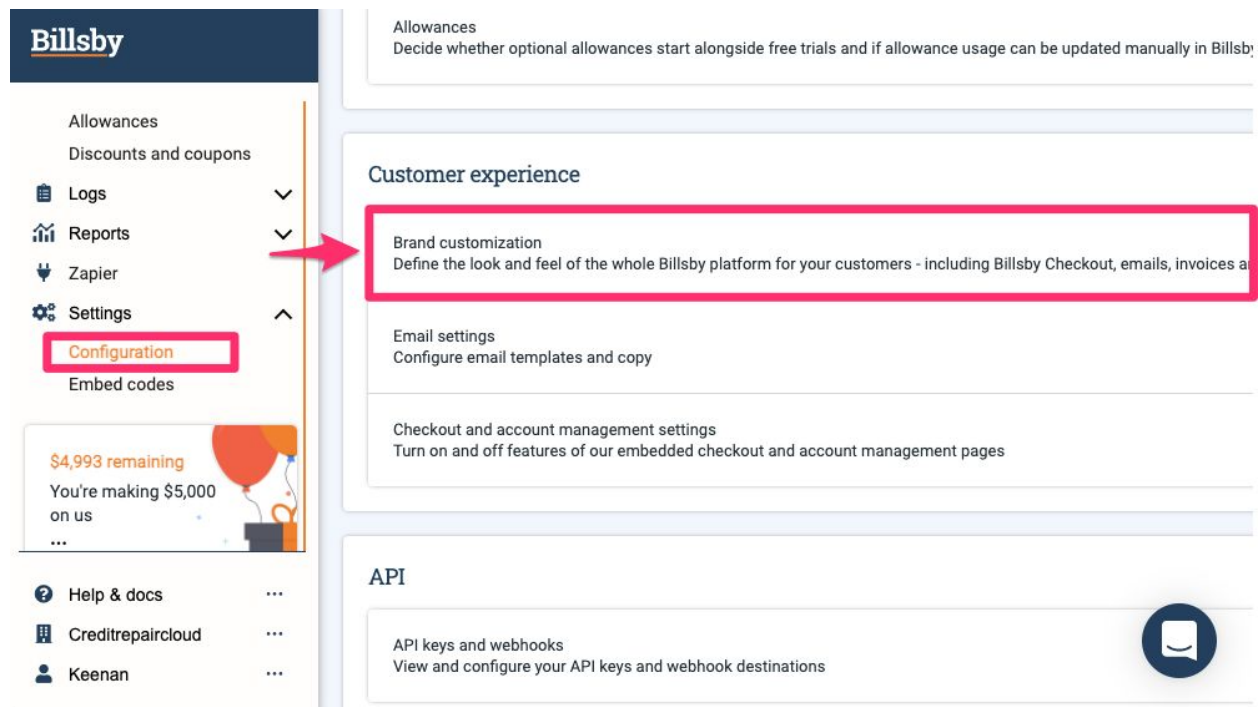


Branding Customization

Billsby gives you the option to customize things so that when a customer is interacting through Billsby, it's your brand identity that they'll see. Emails and invoices can be sent with your brand colors and logos, and the checkout flow can be tied into your website with ease. Here is a guide to brand customization with Billsby.

Brand customization is optional and is a useful tool for Billsby to look good to your customers. Go to Settings > Configuration > Brand Customization to get started. Inside, you'll find two

sections:



Checkout and account management

Here, you can:

- Change the colors of checkout, including the background, header and button colors - and even the colors for positive and negative alerts
- Set the typography to the font you use for your business
- Even choose how rounded you want the corners to be!

Emails and invoices

Here, you can:

- Upload your company logo and set your brand colors

There's also links to where you can change the copy and text and settings of checkout, account management, emails and invoices at the bottom of the two screens.

Zapier integration

If you are a Zapier user, Billsby has created 2 zap templates for you:

Update client: This zap will Update client information in Credit Repair Cloud every time that customers information is updated in Billsby <https://zapier.com/app/editor/template/405049>

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>

Getting Help From Billsby

You can contact Billsby Support from within your Billsby account by logging in and clicking the message icon in the bottom right corner. They ask you to contact them from within the software because that establishes that you are the account user.

We've liaised with Billsby to make sure they understand what Credit Repair Cloud is, and their support team are specially trained to help customers like you.

With any support issue, the clearer you can communicate with Billsby, the better and faster they will be able to assist you.

Let them know:

- What you're trying to do
- What's going wrong
- And include relevant details, customer name, error messages, screenshots, etc.

Like most software companies, they will respond within one business day.

Billsby

Dashboard

Customers

Subscriptions

Invoices & credit notes

Invoices

Credit notes

Products

Logs

Reports

Zapier

Settings

When you're ready for lift-off, we're ready

GO LIVE

Help & docs

Credit Repair


Alex

1 subscriptions

Search subscriptions by customer name, email or subscription ID

EMAIL	FULL NAME	SUBSCRIPTION	CREATED ON	STATUS	SUBSCRIPTION ID
JohnDoe@testmail.com	John Doe	Basic Credit Repair	03 Dec 2020	ACTIVE	43VL9KME60

Start a conversation



Our usual reply time
⌚ A few hours

Send us a message

See all your conversations

Logged in mode

Logged in mode

We run on Intercom