









Table of Contents

The SnapBill QuickStart Guide contains step by step instructions on how to setup your SnapBill account. Browse through the sections below to help you to start using your SnapBill account.

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So you have heard the buzz, checked out the SnapBill website and registered for the ultimate online billing system. But what do you do now? Well, the SnapBill QuickStart Guide will walk you through your account setup, give you information on system features and provide useful tips to help you get started.



My Account

Your *My Account* window is located at the bottom of the navigation menu at the left of your SnapBill screen. The *My Account* window indicates the package you are currently on and your account usage.

Support

SnapBill has several help and support services to assist you when you need answers.



Help screens

Look out for help screens when navigating SnapBill. Each table in SnapBill has an expandable help screen that gives you immediate FAQ help related to that section.



Forums

For fast interactive help you can post your questions or suggestions in our SnapBill community forum at <http://forums.snapbill.com>.



Knowledgebase

For video tutorials, in-depth 'how to' guides & answers to frequently asked questions go to <http://support.snapbill.com/knowledgebase>.

Your SnapBill username & password is sent to you in your welcome email. Remember to keep them in a secure place. Login anywhere, anytime from any web enabled device.



Your Account

To login to your SnapBill account go to <https://billing.snapbill.com>. Log in with the username and password provided to you in your welcome email.



Billing Management Centre

Your clients can view their invoices, account statements, change their payment methods and order your services online by using their SnapBill username and password to login at <https://yourusername.snapbill.com>.



Online Order Centre

Your new or existing clients can go to <http://yourusername.snapbill.com/signup> to order your services online.

Navigation

When you log in to SnapBill the *Dashboard* screen will open. From the *Dashboard* you can use the navigation menu to open & use sections in SnapBill. Review the explanations below to get your bearings in SnapBill.

P Help Icon

Click on the help icon (?) to reveal help for certain windows in SnapBill. To hide the help screen again click the hide icon (☺).

O Billing Setup

This quick link will take you to the Billing Setup section in SnapBill. You can brand you invoices here & update your general and invoices details.

N Your Username

Your account username is displayed here.

M Balance

Your current account balance is displayed here.

L Logout

Use this quick link to log out of SnapBill when you are done with your session.

K Upgrade

The *Upgrade* quick link allows you to upgrade from your current SnapBill package to a new package. You can also use this link to downgrade to a smaller account.

J Payment Details

This quick link allows you to change your SnapBill accounts payment method.

I Summary Window

The summary window displays running totals for paid and unpaid invoices for 4 months in table and graph format.

A Client Search Box

Use this search box for quick searches of client records. You can search using:

- Client name/surname
- Client/invoice number
- Username
- Company name

B Navigation Menu

The navigation menu allows you to move between sections in SnapBill. View your account usage in the *My Account* (C) window. Clicking on a section heading in the navigation menu (D) will open the sub-sections present under it (E). Clicking on each sub-section will reveal the options present under it (F).



G Help Screens

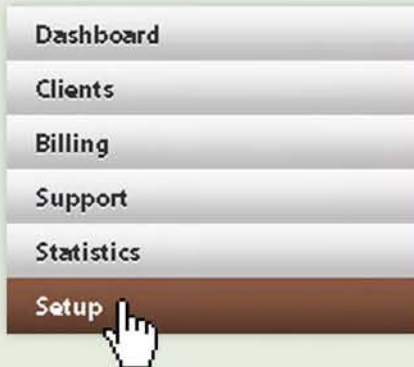
Look out for help screens when navigating SnapBill. Each table in SnapBill has an expandable help screen that gives you immediate FAQ help related to that section.

H Twitter Feed

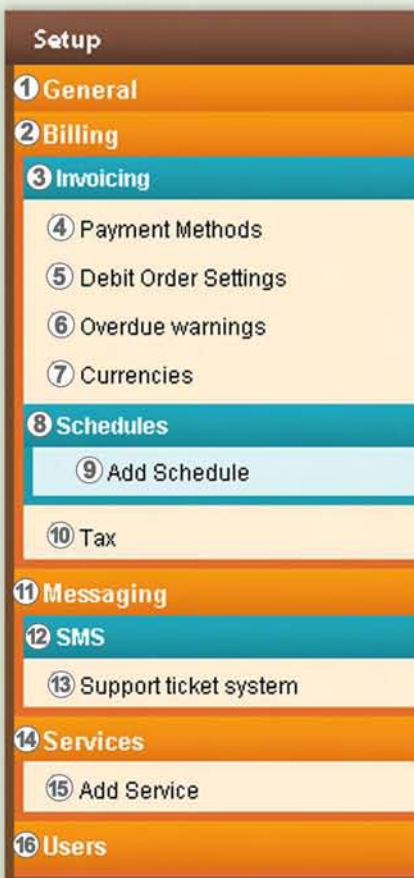
The Twitter feed displays all recent tweets by SnapBill. Click the link at the top right of the window to follow SnapBill on Twitter at twitter.com/SnapBill.



Once you have registered your SnapBill account you can start entering and editing your settings. Click on the *Setup* button in the navigation menu to get started.



Click on the *Setup* section in the navigation menu to the left of your SnapBill screen to open the *Setup* sub-sections & options as seen below.



Note: Complete your account setup before you add clients and start generating invoices.

1 General



General and Invoice Details

Enter and edit your company details, VAT number, invoice details and invoice terms and notes.



Invoice Editor

Custom brand your quotes, invoices & statements here. Upload your logo, edit layout and display and select custom colours.

2 Billing



3 Invoicing

Set custom invoice and client numbers, select whether invoices are sent manually or automatically and set how far before due date invoices should be issued.



4 Payment Methods

Enable the methods of payment you want your clients to use. Clients can pay via EFT, Credit card, Debit Order, PayPal or Other.



5 Debit Order Settings

Edit your bounced payments email and create batch dates for submission of debit orders.



6 Overdue Warnings

Edit past due warning messages, suspension within 24h and suspension email templates.



7 Currencies

Enable the currencies you want your clients to pay you in. You can enable as many currencies as you like. And your clients can pay you in any currency they prefer.



8 Schedules

Use Add schedule ((9)) to setup recurring charges and debit batches on custom dates.



10 Tax

Enter the VAT percentage that should reflect on your invoices.

11 Messaging**12 SMS**

This module allows you to send SMS text messages from your bulk short message service account through SnapBill. Enable this module by entering your bulk short message service account details.

**13 Support Ticket System**

The support ticket system allows you to handle & store support emails from clients. Once enabled you can set outbox delays, email forwarding & automatic responder text here.

14 Services

You can add your own services & packages in SnapBill. These can be ordered by your clients from the *Online Order Centre* at <http://yourusername.snapbill.com/signup>.

**15 Add Service**

Click here to add a service eg. My Magazine Subscription Service. Once the service has been created you can add packages for that service eg. 12 Month Subscription or 24 Month Subscription. These can then be applied to client accounts or ordered online.

**Resell Selected Services**

SnapBill also provides the opportunity to resell services from selected companies listed on the system. You can currently resell Lusion Technologies' web hosting services. To find out more about reselling services or to have your service listed for resale send an email to support@snapbill.com.

16 Users

The *Users* module allows you to add several users or staff members to one SnapBill account with varying levels of permission. To find out more about adding a user contact support@snapbill.com.



SnapBill allows you to record and manage all your client information. Once you have completed your account setup you can start adding your clients to SnapBill.

**Client Search Box**

You can search your client records by entering the client name or surname, company name, invoice number or client number. Search results and client records can be sorted by account status, services, invoices due, balances and creation date.

CLIENTS



To start adding clients to your SnapBill account click on the *Clients* section in the navigation menu at the left of your SnapBill screen. In the *Clients* section click on the *Add Client* sub-section to begin adding clients.



How to add a client

Fill in the clients details in the *Add Client* window. Once complete click the *Add Client* button at the bottom of the window. You can view, modify or remove a client record at any time by searching for the client in the *search box* and opening their client record.



Client Records

A client record contains the following information:

1 Client Details

This table displays the clients general details. To edit click the modify button (2) at the top of the window.

3 Public Details

Displays the clients public details for users who makes use of external services reselling through SnapBill; eg. Lusion Technologies Reseller Hosting.

4 Contacts

Displays the clients email contacts for *General, Billing & Technical* emails. Click *Add Contact* (15) to add or edit.

5 Charges

Displays the charges that are applied to the clients account. Click *Create Charge* (11) to add a new charge.

6 Invoices

Displays the invoices you have sent to the client and records their status. Click *Create Invoice* (10) to add a new quote or invoice.

7 Email Threads

Displays a record of all email correspondence between you & the client. Click *Send Email* (12) to send a new email to the client.

The screenshot shows a client record for 'Doe Corp. (Jane Doe)'. On the left is a navigation menu with options like Dashboard, Clients, Billing, Statistics, and Setup. The main content area is divided into sections:

- Client Details:** Shows fields for First Name, Email Address, Company, Currency, Credit, Support Comment, and Account Created. A 'Modify' button (1) is at the top right.
- Public Details:** Shows fields for Name, Street Address, City, Country, Phone number, Email Address, Postal Address, Province, and Fax number.
- Contacts:** A table with columns for Class, Name, Email Address, Cellphone Number, General, Billing, and Technical. A 'Client (primary)' row is shown.
- Charges:** A table with columns for Description, Amount, Created, and Next Renewal. A 'Monthly Subscription' charge is listed.
- Invoices:** A table with columns for Number, Due Date, Total, and Status. Three invoices are listed, all with a status of 'cancelled'.
- Email Threads:** A table with columns for Date, Type, and Subject. Two email threads are shown.
- Actions:** A table with columns for Date and Description. It lists recent actions like invoice cancellations and email sends.

8 Actions

This table displays a record of all the clients actions in SnapBill. Click on each action link to view the individual action.

9 Account Statement

Click here to view the clients account statement. The statement will list all invoices issued to the client as well as account credit and total amount due.

13 Send SMS

This is a premium account feature and allows you to send an SMS to the client directly from within SnapBill.

14 Add Service

This option allows you to add a service to the clients account. Once the service is added it will automatically renew and create invoices.

16 Add User

Add a user and allow the client to access your Billing Management Centre.

17 Payment Method

Click here to modify the clients payment method.

18 Advanced Tools

Advanced Tools allow you to merge separate client accounts into one and push services from one account to another separate account.

19 Remove Client

To delete a client account click *Remove Client* and confirm. The client account will be permanently removed from your monthly account usage tally, but the details will be stored as a 'dead' client backup on your account and can be accessed by contacting system administrators at support@lusion.co.za.



Use SnapBill to create, send and save quotes and invoices. You can also create automated recurring charges, process client payments and export data from SnapBill for use in other applications. Click on the *Billing* section in the navigation menu to get started.



Add a Charge

SnapBill allows you to set up recurring or once-off charges and link them to client accounts. Once a charge has been created SnapBill will automatically generate invoices according to the charge specifications. Adding a charge for a specific date will cause an invoice to automatically be generated and sent out for charges set to occur/recur on the specified date. If there are more than one charge set to occur/recur on a day then all charges will be combined into a single invoice for you.

BILLING

How to Add a Charge

To add a charge click on the *Billing* section in the navigation menu and click *Add a Charge*.



Pick a client account to add the charge to.



Enter the charge description & amount.



Set the period & recurrence.



Add & save your charge.



Automatically send invoices

SnapBill automatically sends the invoices and quotes you create for your clients. To prevent invoices from being sent out automatically go to *Setup* → *Billing* → *Invoicing* → *Invoice Options* table. Untick the *Automatically Send Invoices* box and save changes. SnapBill will now not issue any invoices automatically, you will have to manually send any invoices you want your clients to receive. To reverse this simply tick the *Automatically Send Invoices* box again.

How to Create an Invoice

SnapBill allows you to create, save and send quotes and invoices. Simply add the items you want to invoice or quote for and SnapBill will automatically calculate the line total and amount due. When you are done SnapBill will automatically email the invoice to your client.



Pick a client account to add the charge to.



Enter the description, unit cost and quantity.



Add or remove lines if needed.



Save as draft, quote or invoice.

Process Payments



To process payments go to *Billing* in the navigation menu and click on *Process Payments*. Choose the client account by entering a complete or partial client reference (name, surname etc) in the query box and wait for results to show. You may then select multiple clients by clicking each required. Now enter the payments they made and click process payments. Payments will automatically be applied to the outstanding invoices present on the clients account.

Reports



You can export your SnapBill data as a CSV or download to Excel. Exported data can be saved and imported for use in other accounting applications or record keeping software. Download the following by going to *Billing* in the navigation menu and clicking on *Reports*:

- Client records
- Invoice logs

- Pricing data
- Services data
- Debit batch records



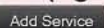
Use SnapBill to create your own services. Once created you can modify and apply your services and their packages to client accounts. Clients can also use your online sign up form to order your services online.

How to Add a Service



To add a service in SnapBill go to the *Setup* section in the navigation menu, click on *Services* sub-section and select the *Add Service* (1) option.

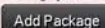
Enter the service name (eg. Newspaper Subscription Service) and click the *Add Service* button.



Now that you have added your service you can start creating packages that your clients can order online. To add a package click the *Add new package* button at the top of the *Current Packages* table.



Enter the package name (eg. Newspaper Delivery), setup fee, monthly and annual fee and click the *Add Package* button.



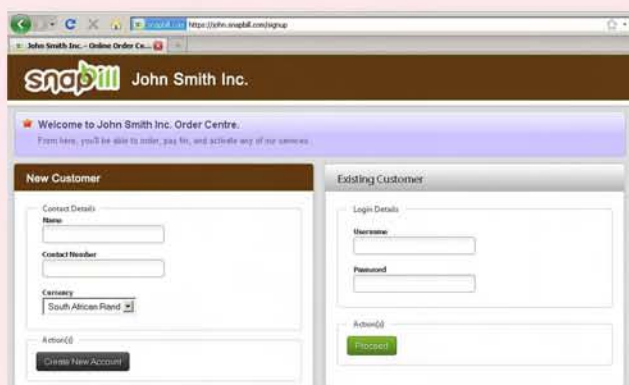
Current Packages		Add new package		US Dollar	South African Rand
Name	Accounts	Your Price	Actions		
Newspaper Delivery	0	Setup: R30.00 Monthly: R120.00 Annually: R1200.00	3	ON	2 edit remove

Your package is now successfully added. To edit or remove the package click the *edit / remove* button (2). To determine whether the package displays in your online order centre click the *on/off* button (3) in the *Actions* column.

You can modify the package settings by clicking on the *Settings* option (4) and add custom fields for the online sign up form by clicking on the *Custom Fields* option (5). To remove the service click the *Remove Service* option (6).

You can add as many services and packages as you like and set different pricing and custom sign up fields for each.

Online Order Centre



Once you have setup your services and packages your clients can order them online by going to your online order centre. Both new and existing clients can make use of the online order centre by going to:

<http://yourusername.snapbill.com/signup>

When one of your services is ordered through the online order centre SnapBill automatically creates a client record and issue the client with an invoice.



SnapBill offers secure, hassle-free billing for any individual or business, no matter how large or small. SnapBill free and premium packages accommodate the needs of SME's, while custom packages are designed for large enterprise clients. Enterprise clients and SnapBill premium users have access to certain advanced features, while new features and custom modules can be create on request.



Enterprise features

SnapBill can be customised to integrate with any enterprises billing and client management needs. The following custom features have been developed for use by enterprise clients:

- ID and bank account verification services
- Custom bulk add forms
- Advanced debit batch functionality
- Multi-user function with permission levels and a full audit of actions performed by each

To make use of any of these custom features contact us.



Support ticketing system

SnapBill premium users have access to a complete support ticketing system.

Client can send an email to your support email address and you can view and answer these email messages from within SnapBill. Support emails can be ordered via priority and department and linked to clients accounts for easy reference.

SnapBill will archive, sort and display the email correspondence you receive according to client account making it easy to locate past email messages.



Text message (SMS) notifications

SnapBill users have the ability to send custom SMS notifications to their clients from within SnapBill. Make use of your own bulk short message service account from within SnapBill.

Use your account details to setup the service under Setup => Messaging => SMS.

Once configured you may use SnapBill to send SMS notifications of your choice directly to your clients.



If you require more information please visit <http://www.snapbill.com> or for enquiries about custom SnapBill integration send an email to support@snapbill.com.