BillingORCHARD
Billing Simplified℠

BillingOrchard - Getting Started Training Guide

This document includes important information to help you get the most out of your BillingOrchard system - quickly! It includes tips, suggestions, feature descriptions and an overall view of the BillingOrchard system to get you on the right track!

Set Up...

1. Company Information:

When you first log into your new BillingOrchard account, click on 'Company Information' in the menu on the left side of your screen (left menu) under the Account section. Here you can complete all of your company information. It is important to keep this information up to date as this information is pulled in through various parts of your BillingOrchard account.

Update Your Company Information

Your Company Name	BillingOrchard Support
Email Address	support@billingorchard.com
Phone Number	888-369-1331
Fax Number	
Contact Name	Support
Address	729 Lambert Drive
Address (line 2)	
City	Atlanta
State/Province	GA
Zip/Postal Code	30324
Country	United States
URL	http://www.billingorchard.com

[Update]

Add Users...

2. Edit/Add Users:

Users are employees or contractors of your company who have access to this administration section to change settings, create invoices and manage clients. Users without Admin privileges can only submit charges and establish default rates. Users with Support privileges may also access the support ticket area to respond to support tickets. You'll want to establish your Users with user names and passwords.

Existing Users   **[Add A New User]**

Name	User	Password	Admin	Support	Edit	Delete
John Smith	jsmith@billingorchard.com		Yes	No	Edit	Delete
Support	support@billingorchard.com		Yes	Yes	Edit	Delete

Add Your Clients...

3. Edit / Add Clients:

Editing and adding clients can be done through the Edit/Add Clients section under Client Management.

 Following are the steps required to add a new client:

a. Click on Edit/Add Clients

b. Click the Add A New Client link

c. Complete the client contact information fields. In addition, set a Username and Password for your client so that they can have access to the client portal underwww.billingorchard.com/clients.
d. Once completed, click Add Client to save your client information.

Edit Client: ABC Candy Co.

Client Name	Set A Username	Set A Password
ABC Candy Co.		
Email Address	Phone Number	Fax Number
mike@billingorchard.com	555-555-5555	444-444-4444
Contact Name	Address	Address (line 2)
John Smith	1234 Main St.	
City	State/Province	Zip/Postal Code
Atlanta	GA	30324
Country	Custom Field Name	Custom Field Value
USA		

Notes

☑ Subscribe To Your Mailing List

Default Hourly Billing Rate

Set the default billing rate for this client. This rate is for reference on the Submit Hours screen. Please note this is a client level configuration while the Set Defaults - Hourly Services is an application level setting.

Rate 1.0

Automatic Invoicing Settings

You can setup a schedule for this client to be automatically invoiced. All pending fees and hours will be added to the invoice, and invoice defaults will be used. If you have your Preferences set to Auto Email recurring invoices, an email invoice invite will also be sent to your client, using your default email template. Leave each of these fields blank if you want to manually create invoices for this client.

Next Invoice Date   Invoice Creation Recurs Every: (Leave blank if non-recurring)

Invoice Stop Date

Set Defaults & Submit Hours & Fees...

4. Set Defaults:

a. Hourly Services:

Hourly Services			[Add A New Service]
Service	Hourly Rate	Edit	Delete
Development	$25.00	Edit	Delete
Graphic Design	$50.00	Edit	Delete
Web Hosting	$25.00	Edit	Delete

i. Hourly services are the services you provide and charge by the time you spent on the project. Here, you will define the default rates, description and service name. You can change these at any time when submitting hours. These defaults are used to allow you to submit hours more efficiently.

b. Miscellaneous Fees:

Miscellaneous Fees			[Add A New Fee]
Item	Item Rate	Edit	Delete
Credit Card	$10.00	Edit	Delete
Software Puchase	$149.95	Edit	Delete

i. Miscellaneous Fees are the non-hourly fees or costs incurred on behalf of your client, such as web hosting fees, or purchasing software on their behalf. Here, you will define the default fees, description and service name. You can change these at any time when submitting fees. These defaults are used to allow you to submit fees more efficiently.

5. Submit Invoice Hours / Submit Invoice Fees:

a. Fees: Click on Submit Fees in the left menu, under the Submit Invoice Charges menu. Submit your fees after incurring an expense on behalf of your client, or for a non-hourly fee.   The fees will be added to pending fees and will remain there until they are added to an invoice.

b. Hours: Submit your hours after completing work on a job or project. The hours will be added to pending hours and will remain there until they are added to an invoice.

Create An Invoice...

6. Create An Invoice:

You will be taken through a series of steps to create an invoice, including adding pending hours and miscellaneous fees (created in step #5) to the invoice, and finally choosing the method to send the invoice to your client. Begin by choosing a client to invoice in the first screen...

Submit Miscellaneous Fees

Completed By	Support
Date the Service Was Completed	01/06/2012
Client	ABC Candy Co.
Choose Service To Get Defaults	
Item Title	
Descript	
Fee / Ra (Number	
Quantity (Number	
Taxable	
Project (	

Submit Service Hours

Completed By	Support
Date The Service Was Completed	01/06/2012
Client	ABC Candy Co.
Choose Service To Get Defaults	
Service	
Descriptio	
Rate Per H (Numbers	
Hours (Numbers	
Taxable	
Project (o	

Begin Creating Your Invoice Below

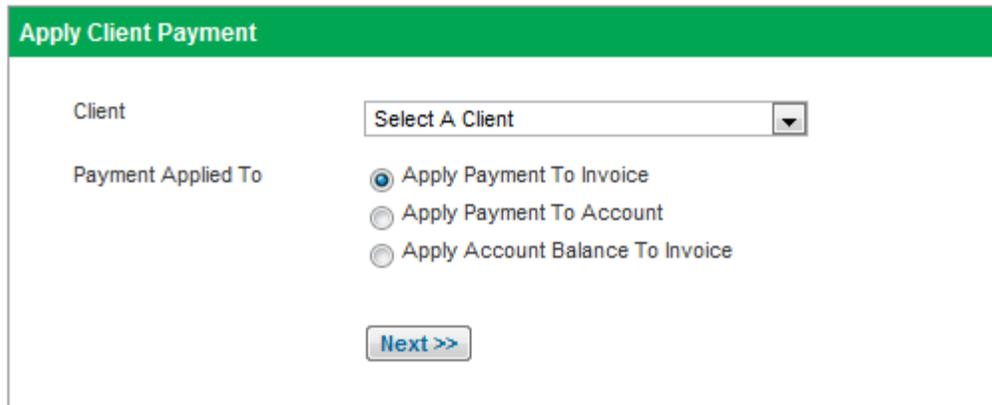|	
Invoice Number	0009
Salesperson for invoice:	Support
Client	ABC Candy Co.
Project (optional)	All
Invoice Date	01/06/2012
Due Date	01/07/2012
Invoice Terms	
Notes	

Next >>

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Apply Payments...

7. Apply Payments:

To apply a payment, go to the Invoices section and click on "Apply Payments":

1. Click on Apply Payments.

2. Select the client in the drop down menu for which the payment will be applied.

3. Select the way the payment should be applied.

Apply Client Payment

Client	Select A Client ▼
Payment Applied To	⦿ Apply Payment To Invoice
	○ Apply Payment To Account
	○ Apply Account Balance To Invoice

Next >>

There are three options:

- **Apply Payment To Account**

Record down payments or other payments made outside of a standard invoice payment. After an invoice is created, you may then apply this payment to the invoice.

- **Apply Payment To Invoice**

Use this option if your client is paying for a specific invoice. You will select the invoice next.

- **Apply Account Balance To Invoice**

Use this option to move funds from the client's account balance to one of their invoices.

4. Once your payment option has been selected, click Next.

5. Complete the fields in the following screen and click Apply Payment.

6. Your payment has been applied. You can verify the payment by going to Reports > Filter or Search Payments.

At this point, you have completed the steps necessary to familiarize yourself with your new BillingOrchard account! If there are any questions during or after this process, please don't hesitate to visit our Knowledge Base by clicking on the Support link on the left side of your screen or you can contact our support team directly at:

support@billingorchard.com