

Step 1

Log into **Fusebill**.

Go to your store's **Customers**.

On the **Customers** page select the **Account Status** and **Descending**. Click **Sort**. This will bring up all of the Poor Standing Accounts.

Customers Export All ADD CUSTOMER

Search: SEARCH advanced tracked items

Status: FILTER

Sort by: SORT

Customer	Financials	Dates	Status
Fusebill ID: 5912673 Customer ID: [REDACTED] Company: [REDACTED] Name: Paul Price	Balance: \$0.00 Net MRR: \$14.95 Pay Method: Credit Card Terms: Net0		Account: Active Accounting: Good
Fusebill ID: 5910731 Customer ID: [REDACTED] Company: [REDACTED] Name: Betty Endictoo	Balance: \$0.00 Net MRR: \$14.95 Pay Method: Credit Card Terms: Net0		Account: Active Accounting: Good

Step 2

Click on the **Fusebill ID**.

That will take you to the patient's dashboard, where you can update the patient's payment information.

Search: SEARCH advanced tracked items

Status: FILTER

Sort by: SORT

Customer	Financials	Dates	Status
Fusebill ID: 5910394 Customer ID: 429522 Company: [REDACTED] Name: [REDACTED]	Balance: \$179.40 Owing Net MRR: \$14.95 Pay Method: Missing Terms: Net0	Created: August 15, 2019 15:14 MDT Next Billing Date: August 15, 2020	Account: Suspended Accounting: Poor Standing
Fusebill ID: 5909850 Customer ID: 430288 Company: [REDACTED] Name: [REDACTED]	Balance: \$179.40 Owing Net MRR: \$14.95 Pay Method: Missing Terms: Net0	Created: August 15, 2019 12:55 MDT Next Billing Date: August 15, 2020	Account: Suspended Accounting: Poor Standing

Step 3

Dashboard

< Back to Customers

Customer SUSPENDED

Fusebill ID: 4574751 Created: August 14, 2018
Customer ID: 307194

CONTACT EDIT

ADDRESS EDIT

EMAIL SETTINGS EMAIL LOG PORTAL TRACKING

Payment Option MANAGE

No payment method ADD

AUTO POST - ON AUTO COLLECT - ON NETO

Accounting POOR STANDING

Balance (owing): **\$179.40**

Pending charges: \$0.00
Available credit: \$0.00
Available funds: (ADD PAYMENT) \$0.00

Customer lifetime value: \$180.87
Monthly recurring revenue: \$14.95

Next billing day: August 14, 2020

Subscriptions

ACTIVE 0 ALL 1
ADD SUBSCRIPTION

Once on the patient's dashboard. Update the payment by clicking on **ADD**.
Credit Card is the first option that will appear. If the patient is paying with a **Voided Check**, scroll down and the **ACH** option will be at the bottom.
Once the information has been updated, click **SAVE** in the bottom right of the box. Fusebill automatically charges the selected payment information.

Add Payment Method

THIS CUSTOMER HAS AN OUTSTANDING BALANCE OF \$179.40. THE PAYMENT WILL AUTOMATICALLY BE ALLOCATED TO ANY UNPAID INVOICES. OLDEST TO NEWEST. AMOUNT TO COLLECT:
\$ 179.40

☒ **Credit Card**

First name:
Last name:
Card number:

Use existing address information:
☐ Yes
☒ No

Address line 1:
Address line 2:

CANCEL SAVE

Add Payment Method

☒ **Checking**
☐ Savings

First name:
Last name:
Account number:
Transit number:

Address line 1:
Address line 2:
City:
Country:
Postal / Zip:

DATE:
PAY TO THE ORDER OF: \$ DOLLARS

CANCEL SAVE