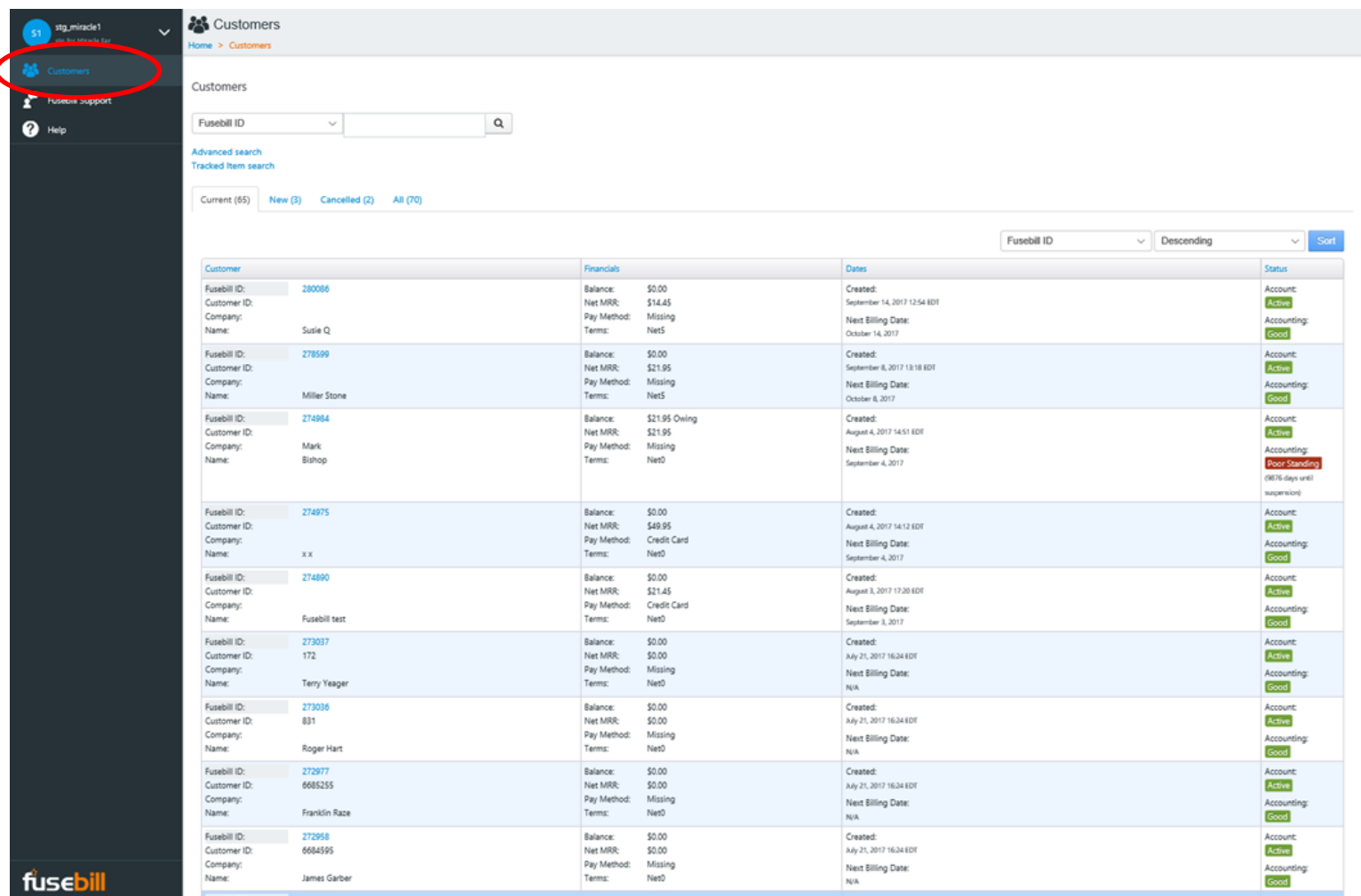


## Fusebill Admin

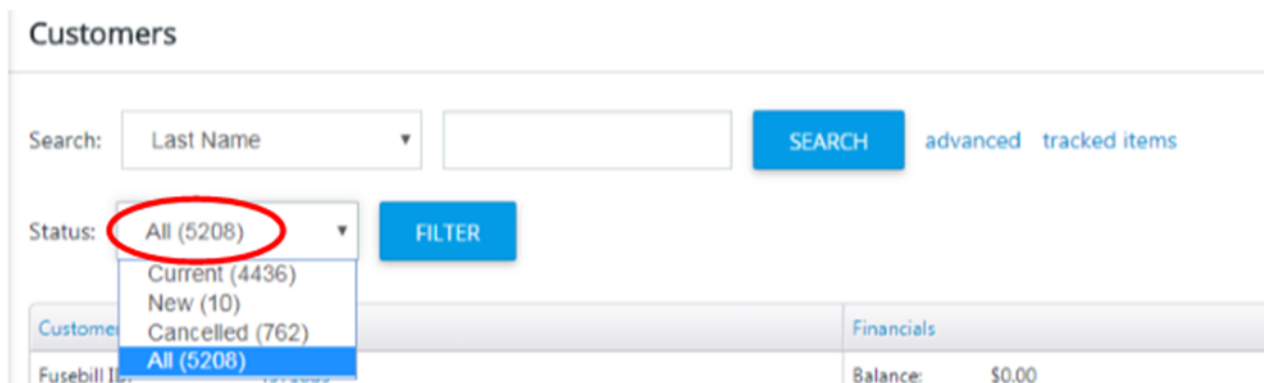
Once you have logged into the **Fusebill Admin**, Click on **“Customers”**, which is on the right column of the screen. This is where you will see a full customer list for your store.



The screenshot shows the Fusebill Admin interface. On the left sidebar, the 'Customers' link is circled in red. The main content area displays a table of customer records. The table has four columns: Customer, Financials, Dates, and Status. The 'Status' column shows various statuses like 'Active', 'Good', and 'Poor Standing'.

Customer	Financials	Dates	Status
Fusebill ID: 280086 Customer ID: Company: Name: Susie Q	Balance: \$0.00 Net MRR: \$14.45 Pay Method: Missing Terms: Net5	Created: September 14, 2017 12:54 EDT Next Billing Date: October 14, 2017	Account: Active Accounting: Good
Fusebill ID: 278599 Customer ID: Company: Name: Miller Stone	Balance: \$0.00 Net MRR: \$21.95 Pay Method: Missing Terms: Net5	Created: September 8, 2017 13:18 EDT Next Billing Date: October 8, 2017	Account: Active Accounting: Good
Fusebill ID: 274864 Customer ID: Company: Name: Mark Bishop	Balance: \$21.95 Owling Net MRR: \$21.95 Pay Method: Missing Terms: Net0	Created: August 4, 2017 14:51 EDT Next Billing Date: September 4, 2017	Account: Active Accounting: Poor Standing (9876 days until suspension)
Fusebill ID: 274975 Customer ID: Company: Name: x x	Balance: \$0.00 Net MRR: \$49.95 Pay Method: Credit Card Terms: Net0	Created: August 4, 2017 14:12 EDT Next Billing Date: September 4, 2017	Account: Active Accounting: Good
Fusebill ID: 274890 Customer ID: Company: Name: Fusebill test	Balance: \$0.00 Net MRR: \$21.45 Pay Method: Credit Card Terms: Net0	Created: August 3, 2017 13:20 EDT Next Billing Date: September 3, 2017	Account: Active Accounting: Good
Fusebill ID: 273037 Customer ID: 172 Company: Name: Terry Yeager	Balance: \$0.00 Net MRR: \$0.00 Pay Method: Missing Terms: Net0	Created: July 21, 2017 16:24 EDT Next Billing Date: N/A	Account: Active Accounting: Good
Fusebill ID: 273036 Customer ID: 831 Company: Name: Roger Hart	Balance: \$0.00 Net MRR: \$0.00 Pay Method: Missing Terms: Net0	Created: July 21, 2017 16:24 EDT Next Billing Date: N/A	Account: Active Accounting: Good
Fusebill ID: 272977 Customer ID: 6685255 Company: Name: Franklin Raze	Balance: \$0.00 Net MRR: \$0.00 Pay Method: Missing Terms: Net0	Created: July 21, 2017 16:24 EDT Next Billing Date: N/A	Account: Active Accounting: Good
Fusebill ID: 272958 Customer ID: 6684595 Company: Name: James Garber	Balance: \$0.00 Net MRR: \$0.00 Pay Method: Missing Terms: Net0	Created: July 21, 2017 16:24 EDT Next Billing Date: N/A	Account: Active Accounting: Good


You can set the **“Search”** to what you prefer. There is a drop-down menu there. Below is the **“Status”** drop down menu, make sure that this is set to **“All”**. That way you can see all the patients, instead of all that are in **“Good Standings”**. This is helpful in managing your Protection Plan data.



The screenshot shows the Fusebill Admin interface with the 'Customers' page. The 'Status' dropdown menu is open, showing options: 'All (5208)', 'Current (4436)', 'New (10)', 'Cancelled (762)', and 'All (5208)'. The 'All (5208)' option is circled in red. The 'SEARCH' button is also visible.

# Updating Payment Methods in Fusebill

Look up the patient. Once you find the patient click on their **Fusebill ID** number. That you will take you to their dashboard.

 Customer

CANCELLED

Fusebill ID: 4572200

Customer ID: 123456

Created: August 13, 2018

CONTACT

Test Test

none@none.com

EDIT

ADDRESS

123 ABC

Eagle , Idaho , United States

83616

EDIT


EMAIL SETTINGS

EMAIL LOG

PORTAL

TRACKING

AUDIT LOG

 Payment Option

MANAGE

No payment method

ADD

AUTO POST - ON

AUTO COLLECT - ON

NETO

SETTINGS

Click on **“MANAGE”**.

The Payment Options screen displays details about the Customers payment method and billing settings. If they have a pay-ment method stored on the system it will be displayed in the box, including card type and expiry if it is a credit card.

Test Test

Payment Methods

< Back to Dashboard

ADD PAYMENT METHOD

Payment Method	Expiry	Default	Actions
Customer has no payment methods.			

To update the payment method click on **“ADD PAYMENT METHOD”**.

If no Payment Method exists, click on ADD. Once the **Payment Method** screen has opened, you can enter in the Payment Method Details. Credit Card option appears first but if you scroll further down, you will see the **ACH Option**.

## Credit Card Payment Method

Fill in the required information and click SAVE. If the Credit Card information is able to be validated the entry screen will disappear and you will see the Success message in the top right-hand corner of the page. If it fails, you will see the Failure notice at the bottom of the entry box. receive a Success message otherwise you will receive a failure message.

Error saving the payment method: There was an error validating the credit card: Failed validation

### Adding a Credit Card as the Payment Method

Click on **Add Credit Card** option


The **Credit Card** detail page will open. Enter the required information. The following are mandatory fields:

- Card Number
- First name
- Last Name
- Expiry Month
- Expiry Year
- CVV

Click SAVE.

By default, the Billing Address stored under the customer will be added. If that information **differs** from the Billing Address displayed, click the *Use existing address information* to **No** and enter in the **Credit Card Billing address**.

Add Payment Method

☒  Credit Card

First name:

Use existing address information:  
☐ Yes  
☒ No

Last name:

Address line 1:

Card number :

Address line 2:

Expiry:  
 mm /  yy


City:


Security Code (CVV2):  
    
(3 digits on back of card, AMEX: 4 digits on front)

Country:  

- Select -

Postal / Zip:

☐  Bank Account

☐  Stripe  
Import an existing Stripe Bank Account token identifier.

CANCEL

SAVE

## ACH Payment Method

Fill in the required information and click SAVE. If the ACH information is able to be validated the entry screen will disappear and you will see the Success message in the top right-hand corner of the page. If it fails, you will see the Failure notice at the bottom of the entry box. receive a Success message otherwise you will receive a failure message.

Error saving the payment method: There was an error validating the credit card: Failed validation

### [Adding ACH/EFT as the Payment Method](#)

Click on **Add Bank Account** option.

The Credit Card detail page will open. Enter the required information. The following are mandatory fields:

- Bank account type
- Account number
- Transit number
- First name
- Last name

Click **SAVE**.

By default, the Billing Address stored under the customer will be added. If that information differs from the Billing Address displayed, click the *Use existing address information* to **No** and enter in the address that is associated to the ACH account.

**Identifying Transit/Routing Numbers for ACH:** Sequence of **nine numeric characters** used by banks to identify specific financial institutions within the United States.

Add Payment Method

☐ Credit Card

☐ Bank Account

Bank account type:  
☒ Checking  
☐ Savings

Use existing address information:  
☒ Yes  
☐ No

First name:

Address line 1:

Last name:

Address line 2:

Account number :

City:

Transit number :

Country:

DATE  
PAY TO THE ORDER OF \$  
DOLLARS  
044072324 000123456789 123  
ROUTING / TRANSIT ACCOUNT CHECK

State:

Postal / Zip:


☐ Stripe  
Import an existing Stripe Bank Account token identifier.

CANCEL

SAVE

## Tracking Data

**Tracking Data** contains hearing aid serial numbers, expiration date, battery size and if batteries are disposables or rechargeable.

 Customer CANCELLED

Fusebill ID: 4572200  
Customer ID: 123456Created: August 13, 2018

CONTACT EDIT  
Test Test  
none@none.com

ADDRESS EDIT  
123 ABC  
Eagle , Idaho , United States  
83616

EMAIL SETTINGS EMAIL LOG PORTAL **TRACKING** AUDIT LOG

## Updating Tracking Data

1. Click on Details for the Customer you want to edit.
2. Choose any of the **Reference data** fields or **Tracking data** fields. All these fields allow you to enter data directly. Complete for each data field you need to configure.
3. Click **“Update”** to save information.

### Tracking Data

Sales Tracking Codes	Reference data	Tracking data
Store Albany	L & D Claim <input type="text"/>	R Warranty Exp 23/4/2019
Sales Tracking Code 2 None	Reference 2 <input type="text"/>	L Warranty Exp 323/4/2019
Sales Tracking Code 3 None	Chargeable Yes	R Battery Size 312-Rechargeable
Sales Tracking Code 4 None		L Battery Size 312-Rechargeable
Invoice Type None		Serial # R 376rgdyw84r
		Serial # L 376rgdyw84l

Update