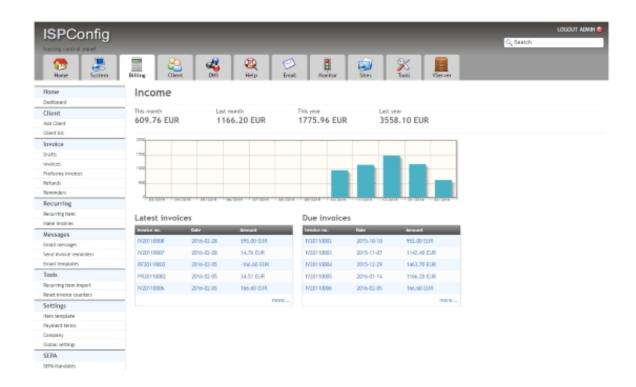


# Manual for the ISPConfig 3 Billing Module

Version 1.4 for ISPConfig 3.0.5.4 Author: Till Brehm <info@ispconfig.org> Last edited on 04/05/2016 The ISPConfig 3 Billing Module is an extension for ISPConfig 3 and is not subject to the BSD license.



# Features of the ISPConfig 3 Billing Module

- Create invoices by invoice editor.
- Automatically create invoices based on recurring items / subscriptions (eg domains, websites, support contracts, etc.).
- Convert a proforma invoice into a regular invoice.
- Save invoices as PDF file.
- Creation of a credit note.
- Creation of proforma invoices.
- Sending invoices, proforma invoices and credit notes via email.
- Sending of payment reminders via email.
- Item templates.
- Email templates.
- Support for multiple clients / companies with separate account number ranges.

- Providing client invoices in the ISPConfig login.
- Expansion of client attitudes from ISPConfig to specific details such as bill payment, e-mail of the billing and payment gateway.
- Automatic assignment of account numbers.
- Creating recurring items based on the ISPConfig client templates.
- The Billing Module is integrated with ISPConfig and ISPConfig can be accessed via the administrator login.
- The Billing Module is delivered in source code so that individual adjustments are possible.
- Support for PayPal payments.
- Support for SEPA debit.
- Management of SEPA Mandates.
- Management of Chargebacks.
- SEPA Debit export in XML format. This is the official SEPA XML format that can be imported by your bank or a banking software like star money business.
- Dashboard plugin to display invoices in the client login.
- Dashboard plugin that lets the client manage his address details.
- Dashboard plugin that shows all products and services bought by the client with option doe Up- Downgrade to other products, buy addon's and cancel products and services.
- External payment link landing page for automated payments from customers.
- Setting of default PDF template for companies.
- Email reminders for recurring products.
- Tool to reset invoice numbers.

# **License And Terms**

The ISPConfig 3 Billing Module is subject to the following license :

The licensee has the right to use the Software on a single ISPConfig 3 control panel server. In a multiserver ISPConfig 3 installation, a license for the "master" server is needed, the slave servers do not require their own licenses. The ISPConfig 3 Billing Module is delivered in source code. Modifications of the source code for your own use are permitted. The source code of the Billing Module must not be disclosed to third parties or published. The useful life is not limited in time. The licensee is entitled to install the Billing Module on a second server for testing

purposes, as long as this server is not used actively for billing purposes.

For questions about the license, you should contact info@ispconfig.org

# **System Requirements**

- ISPConfig > 3.0.5
- PHP > 5.3
- The PHP cURL extension must be installed.

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# 1 Formatting and Conventions used in the Manual

In the manual, the following graphic highlights are used.

## 1.1 Commands

Commands to be run on the command line are formatted as follows:

php -q install.php

## **1.2 File Contents**

File contents are formatted as follows:

```
127.0.0.1 localhost.localdomain localhost# Auto-generated hostname. Please do not remove this comment.
```

78.46.230.214 server1.example.com server1

## 1.3 File Names, Protocol Names, Etc.

File and protocol names are formatted as follows:

```
http://<hostname>:8080/
/var/vmail
/etc/fstab
admin
Email > Spamfilter > Blacklist
```

## **1.4 Accentuations**

Important information is formatted as follows:

Please note that this automatic network configuration works only on Debian/Ubuntu and only if you have one network card which must be eth0.

# **2 Installation and Update**

## 2.1 Installation of the ISPConfig 3 Billing Module

Prerequisite for the Billing Module is a working ISPConfig 3 installation. If ISPConfig 3 is not already installed, please install ISPConfig 3 by following one of the "Perfect Setup" instructions:

#### http://www.ispconfig.org/documentation/

Then upload the .zip file with the ISPConfig 3 Billing Module to the server (e.g. with WinSCP). For the following steps you need to be logged in as root user on the shell.

Unzip the file with this command:

unzip ispconfig3\_billing\_addon\*.zip

Change to the *billing* directory...

cd billing\*

... and run the *install.php* script:

```
php install.php
```

The next few steps have to be performed in the ISPConfig control panel interface:

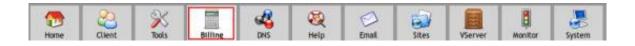
Log in as *admin* user in ISPConfig, and click on *System* > *CP* Users > *Edit* user:

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And there on the *admin* user. Select the option *billing* in the list of modules of the user and click *Save*.

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User Hanagement	Users Form to edit systematers.		
Remete Users	Users Groups		
System	Username	admin	
Server Services	Password	Generate Recovord	
Server Config	Password strength		
Server IP addresses	Paterioru salengar		
Additional PHP Ventions Directive Snippets	Repeat Password		
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Now click on *Logout* admin in the upper right corner of ISPConfig and log back in as the *admin* user. You will find the Billing Module under *Billing* in the top menu.



When you added clients in ISPConfig before you installed the Billing Module, then go to Tools > Resync in ISPConfig, enable the checkbox "Resync Client records" and start the resync. This will import the existing clients into the Billing Module.

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borword and Language	,							
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## 2.2 Update of the ISPConfig 3 Billing Module

Upload the .zip file with the ISPConfig 3 Billing Module to the server (e.g. with WinSCP). The following steps must be executed as root user on the shell.

Unzip the file:

unzip ispconfig3\_billing\_addon\*.zip

Change to the billing directory ...

cd billing\*

... and run the update.php script:

php update.php

# Functional Overview of the ISPConfig 3 Billing Module

## **3 Client**

In this submenu, the client data is managed.

## 3.1 Add Client

Clicking on this menu item creates a new client record. On the first tab, the client master data such as address, telephone, etc. are created. On the tab *Limits* the limitations of the client accounts will be established. These settings are identical to the forms that can be reached via the ISPConfig *Clients* module. Details specific to billing can be reached via the client list and the *Settings* button.

## 3.2 Client List

Using this menu item, the list of clients and resellers will be displayed. Clicking on the name of the client opens the known client details and limits. A click on the *Settings* button at the end of

the line opens the billing preferences of the client.

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Cliente	& Poro	lore						
citerius	a nese	ners						
Tests								
10018								
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### 3.3 Billing preferences of the Client

The *Settings* button in the list of clients leads you to the billing preferences of the client.

## Invoice client settings (Defaults)

Company	test corp	-
Invoice email		
Payment terms	15 tg	*
Payment gateway	None	-
Last invoice number	0	
Last refund number	0	
Last proforma number	0	
Invoice Dispatch	PDF Invoice	*
SEPA Mandate Reference	- Select Mandate Reference -	-

These are the default settings for automatically generated invoices. For manually created invoices , the values can be changed when creating the invoice.

**Company:** Company, which is used as the sender of the invoice.

Invoice email: Email address to send the invoice to. This information is optional. If no email

address is specified, the email address is used from the client master data.

**Payment terms:** Payment terms of the client. New payment terms can be defined in *Settings* > *Payment*.

**Payment gateway:** Activation of the automatic payment gateway for the client. Also refer to 9.1

Last invoice number: Here you will find the last used invoice number when you use customer specific invoice number groups.

**Last refund number:** Here you will find the last used refund number when you use customer specific refund number groups.

Last proforma number.: Here you will find the last used proforma number when you use customer specific proforma number groups.

**Invoice Dispatch:** Here you can set how the customer shall receive its invoice documents (PDF by Email, Printed Invoice, PDF by Email and Printed Invoice or no Invoice Dispatch).

**SEPA- Mandate Reference:** Here you can assign an SEPA Mandate Reference to the client. SEPA Mandates get created and managed under SEPA > SEPA Mandate. This is only required when you use the SEPA payment gateway.

## 4 Invoice

#### 4.1 Drafts

This is where invoice drafts are saved. To create drafts, create an invoice as shown in chapter 4.2 and use the *Save Draft* Button to save an invoice as draft.

#### 4.2 Invoices

Via the menu item *Invoices*, the list of created invoices appears.

ISPConfig										Q Sea	ch	
Horse System	Billing	Client	🚜 🥺 DHS Help	() Enal		a Sites	- Northead Street	VServer				
Home	Invoic	e										
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Client	Teels											
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Refunds			*									
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Recurring	1/20110007	2016-02-28	John Doe Inc. :: John	Doe Hohestee, C11	14,7560 EUR	No	Yes 2	io No	No	PDF Involce	-	10
leaving item	Tract reset	2010/02/00	2011 000 01 2011	our gomeon, cry	PL7-MR Lans	~		10 110	~	P DI STOLE		
Nake Involces	FV20110006	2016-02-05	John Boe Inc. :: John	Dae (johndoe, CI)	166,6000 EUR	Tes	Yes P	So Yes	No	PDF Involce	•	西
Wessages	1/20110005	2016-01-14	Tom Test (tam, C2)		1164.3000 FLIR	No	Yes 1	io No	No	PDF Invoice	-	12
Ernall messages	Tract Notes	00101011-104	the test frant est		1106-2306/2014	~	ies i	10 110	~	FOF BROKE	-	123
Send Involce reninders Enail templates	1/20110004	2015-12-29	Tom Test (tom, C2)		1463.7000 EUR	No	Yes P	io No	No	PDF Invoice		72
Tools	FV20110003	2015-11-07	Tom Test (tom, C2)		1142.4000 EUR	No	Yes P	ie Ne	No	PDF Invoice		1
Recurring Item Import			the second second									-
Reset Involce counters	1/20110002	2015-10-10	Tom Test (tom, CI)		952.0000 EUR	Mo	Yes P	io No	No	PDF Involce	- ÷	1
iettings				lo	tal: 5500.6560 EU	8.						
tem template												
Nyment terms						1 494						

## 4.2.1 Create Invoice (Manually)

By using the menu item *Add Invoice* or the button *Add new record* in the invoice list, a new manual invoice is created. For manual invoices, the invoice items, like in a traditional invoice program, are added by using an invoice editor. Additionally, the ISPConfig 3 Billing Module also supports the automatic generation of invoices, see chapter 5.2.

Address Items		
Туре	Invoice	-
Company (sender)	test corp	-
Client	Tom Test (tom, C2)	-
Invoice no.		
Invoice Date	2016-03-03	
Company name		
Contact name	Tom Test	
Street	Test Street 55	
ZIP	23456	
City	Hamburg	
State		
Country	Germany	-
Email	tom@tester.tid	
VAT-ID		
Payment terms	15 tg	-
Payment gateway	None	-
Printed		
Sent		
Paid	-	
Reminded		
Refunded		
Payment Date		
(Internal) Notes	0	
Invoice Annotation	0	
	-	

#### **Description of the input fields:**

**Type:** The type determines whether it is an invoice, a proforma invoice or credit note.

**Company (sender):** This field specifies the sender (issuer) of the bill. To add a new company, see chapter 8.3.

**Client:** Recipient of the invoice. When selecting an invoice recipient, the address form fields are filled in automatically. To add new clients see chapter 3.2.

**Invoice No.:** The invoice number is generated automatically when the invoice is completed. If an invoice is saved as a draft, it will get an invoice number only after pressing the *Complete Invoice* button.

**Invoice Date:** Date that should appear on the invoice. This field is pre-filled with the current date, but you can change it manually.

Company name, Contact name, Street, ZIP, City, State, Country, Email, VAT ID: Details of the invoice recipient. These appear on the PDF invoice.

Payment terms: The payment terms will appear on the invoice and be used in the dunning

process.

#### Payment gateway:

- None: The automatic payment page is disabled.
- Auto: The automatic payment page is enabled. See also chapter 9.1.
- **SEPA CORE:** The SEPA CORE mode for automatic SEPA Debit.
- SEPA COR1: The SEPA COR1 mode for automatic SEPA Debit.
- SEPA B2B: The SEPA B2B mode for automatic SEPA Debit.

Printed: Status field to mark the bill as printed.

**Sent:** Status field to mark the invoice as shipped. This field is set automatically by the emailing function, but can also be activated manually when the invoice was sent by post.

**Paid:** Status field to mark the invoice as paid. This field is set by the PayPal IPN function when the automatic payment page is used, but can also be set manually.

Reminded: Status field to mark the invoice as reminded.

Refunded: Status field to mark the invoice as refunded.

**Payment Date:** Date of payment. This field is set by the PayPal IPN function when the automatic payment page is used, but can also be set manually.

**Invoice Amount:** Amount of the invoice. Is calculated automatically.

**Notes:** Notes to the invoice.

Invoice Annotation: An annotation that is shown on the invoice PDF document.

#### Description of the buttons below the invoice form:



Save Draft: Saves the invoice as a draft. There is no invoice number assigned. The invoice

can be deleted and you can add more items to the invoice.

**Save & Finalize:** The invoice is saved, closed and the PDF of the invoice is created. The invoice is assigned a sequential invoice number. The invoice cannot be deleted anymore.

Add Items: By pressing the button you move to the *Items* tab. There you can add items to the invoice.

Cancel: Creating or editing the invoice is canceled. No changes will be saved.

#### Tab "Items" of the invoice form

Address	Rems	
Item	Number: 1 Price (net): 0.0000 VAT: 19.0000 %     Add / S	Save
Quantity	Description	Price (net) VAT Sum (net)
1	Registration of the domain test.tld from 2016-03-10 - 2017-03-09.	8.0000 19.0000% 8.0000 Del

#### Add Items To An Invoice

Select an item template in the box --Item--. The fields marked Price, VAT and the Description will be automatically populated with the data from the item template. Alternatively, you can also fill in the contents of the fields Number, Price, VAT and the field for the complete Description directly. Finally, click on Add / Save to add the item to the invoice. Numbers get shown with 4 positions after decimal point to allow it to create rounded "inc. VAT) prices. In the invoice PDF, all prices are shown with 2 positions after the decimal point.

To edit an existing item, click the *Edit* button in the item line. The product details are then displayed in the edit boxes. Click on **Add / Save** to save the changes.

To delete an item, simply click the *Del* button in the item line.

When all items have been added to the invoice, click on *Save and Finalize Invoice* at the bottom of the invoice form.

#### 4.2.2 Email an Invoice

Emailing of invoices is done via the Action menu in the invoice list.

Invoice											
Invoice No.	Bate	Client	Tetal	Sent	Printed	Paid	Reminded	Refunded	Invoice Dispatch	_	*
		*		-	-	-	-	*	*	T	
IV20110009	2016-03-03	Tom Test (tom, C2)	9.5200 EUR	No	Yes	No	No	No	PDF Involce	۲	TA .
IV20110008	2016-02-28	Tom Test (tom, C2)	595.0000 EUR	No	Yes	No	No	No	PDF Invoice		1
IV20110007	2016-02-28	John Doe inc. :: John Doe (johndoe, C1)	14.7560 EUR	No	Yes	No	No	No	PDF Invoice		1
IV20110006	2016-02-05	John Doe inc. :: John Doe (johndoe, C1)	166.6000 EUR	Yes	Yes	No	Yes	No	PDF Involce		1
IV20110005	2016-01-14	Tom Test (tom, C2)	1166.2000 EUR	No	Yes	No	No	No	PDF Involce		1
IV20110004	2015-12-29	Tom Test (tom, C2)	1463.7000 EUR	No	Yes	No	No	No	PDF Invoice		1
IV20110003	2015-11-07	Tom Test (tom, C2)	1142.4000 EUR	No	Yes	No	No	No	PDF Invoice		12
IV20110002	2015-10-10	Tom Test (tom, C2)	952.0000 EUR	No	Yes	No	No	No	PDF Invoice		12
		Total	: 5510.1760 EUR								
			Pag	pe 1							

A click on the button with the blue arrow icon displays the invoice action menu.

Send PDF file by email	۲	Standard invoice email	
Send invoice reminder	0		
Got chargeback	0		
Duplicate invoice	0		
Refund invoice	0		

Select an email template (optional) and click on Next to get to the email editor.

#### Email message

Sender	test corp	*
ecipient	Tom Test (tom, C2, tom@tester.tld)	*
emplate	Standard Invoice email	*
CLIENT_COMPANY_ID], {CLIENT CLIENT_MOBILE], [CLIENT_FAX] CLIENT_BANK_NAWE], {CLIENT_ SSUER_CEO_NAWE], {ESSUER_V SSUER_TELEPHONE), [SSUER_V	CUSTOWER_NO), (CLIENT_VAT_ID), (CLIENT_STREET), (CLIENT_ (CLIENT_SNAL), (CLIENT_INTERNET), (CLIENT_ICQ), (CLIENT_ BANKACCOUNT_BANI, (CLIENT_BANKACCOUNT_SWIFT) ::: (SSI NT_ID), (SSIUET_IAN_ID), (SSIUE, COMENNY_REGISTER, (SSIUE	VOICE PWY_LINK) = (CLIENT_SALUTOTIONS, (CLIENT_CONTACT_NAMES, (CLIENT_COMPANY_NAME), ZP}, (CLIENT_CITY), (CLIENT_STATE), (CLIENT_CONTACT_NAMES, (CLIENT_COMPANY_NAME), NOTES), (CLIENT_BANKACCOUNT_OWNER), (CLIENT_BANKACCOUNT_NO), (CLIENT_BANK_CODE), IBR_COMPANY_NAME, (SELIER_COMPANY_NAME SHORT, (SSUER_CONTACT_NAME), R_STREET), (SSUED_ZP), (SSUER_COTY), (SSUER_STATE), (SSUER_COUNTINY, INT_OWNER), (SSUER_BANKACCOUNT_NO), (SSUER_BANK_CODE), (SSUER_BANK_NAME),
essage	Please find attached your invoice.	
	Best Regards	
	your hosting company	
CLIENT_COMPANY_ID}, {CLIENT CLIENT_MOBILE}, {CLIENT_FAX} CLIENT_BANK_NAWE}, {CLIENT_ SSUER_CEO_NAWE}, {ESSUER_V SSUER_TELEPHONE}, {ESSUER_V	CUSTOWER HOU, BCLIENT WA JOS, COLENT STREET, JOLENT, BCLIENT BANAL, DOLENT MATERNET, BCLIENT JCCS, CULENT, BANKACCOUNT, BANI, ICLENT BANKACCOUNT, SWIFT J: DSS AT JOS, JSSUER, DALLS, ISSUER, INTENNET, MSSUER, JSSUER MATAX, ISSUER, DALLS, ISSUER, INTENNET, MSSUER, BANKACCO	VOICE, RW_LINK) = (CLIENT_SALUTOTIONS, (CLIENT_CONTACT_NAMES, (CLIENT_COMPANY_NAME), ZPS, (CLIENT_CITYS, (CLIENT_STATE), (OLIENT_CONTACT_NAMES, (CLIENT_COMPANY_NAME), NOTES), (CLIENT_BANKACCOUNT_OWNER), (DLIENT_BANKACCOUNT_MO), (CLIENT_BANK_CODE), JER_COMPANY_NAME, (BSUER_COMPANY_NAME_SHORT), (BSUER_CONTACT_NAME), STREETS, JESUER_ZPS, (BSUER_COMPANY_NAME, SHORT), (BSUER_CONTACT_NAME), INT_OWNER), (BSUER_BANKACCOUNT_NO), (BSUER_BANK_CODE), (BSUER_BANK_NAME),
LIENT_COMPANY_ID}, [CLIENT LIENT_MOBILE], [CLIENT_FAX], LIENT_BANK, NAMEJ, [CLIENT_ SSUER_CCO_NAMEJ, [ESUER_V SSUER_TELEPHONE], [ESUER_SSUER_ SSUER_BANKACCOUNT_IBAN],	CUSTOWER_NO), (CLIENT_WAT_ID), (CLIENT_STREET), (CLIENT_ (CLIENT_SNAL), (CLIENT_INTERNET), (CLIENT_ICQ), (CLIENT_ BANKACCOUNT_BANI, (CLIENT_BANKACCOUNT_SWIFT) :: (DSI AT_ID), (SSUER_TAX_ID), (SSUER, COMPANY_REGISTER, (SSUE	ZP3, [CLENT_CITY3, [CLENT_STATE], [CLENT_COUNTRY], [CLENT_TELEPHONE], NOTES], [CLENT_BANKACCOUNT_OWNER], [CLENT_BANKACCOUNT_NO], [CLENT_BANK_CODE], JER_COMPANY_NAWE], [ISSUE_CONTANY_MANE_SHORT], [ISSUER_CONTACT_NAME], STREET, JISSUEL ZP3, [ISSUEL_CITY3, [ISSUER_CONTRY], ISSUER_CONTRY],
LLENT_COMPANY_ID, (CLENT_ LLENT_MOBLE], (CLENT_BAC) LLENT_BANK, NAME, (CLENT SSUER_CEO_NAWE), (ESUER_V SSUER_TELEPHONE), (SSUER_ SSUER_BANKACCOUNT_BAN), ype	CUSTOWER NOS, (CLIENT, WAT, IDS, (CLIENT, STREET), (CLIENT, (CLIENT, EMAL), (CLIENT, INTERNET), (CLIENT, ECO, (CLIENT), EMINACCOUNT, BANI), (CLIENT, BANKACCOUNT, SWIFT), (ESOIE ATTUD, (SSUER, TAX-ID), (SSUER, COMMANY, REGISTER), (SSUER (AVA), (SSUER, DANLS, (SSUER, LINTENNET), (SSUER, BANKACCO (SSUER, BANKACCOUNT_SWIFT), (SSUER, CREDITOR, ID)	ZP3, [CLENT_CITY3, [CLENT_STATE], [CLENT_COUNTRY], [CLENT_TELEPHONE], NOTES], [CLENT_BANKACCOUNT_OWNER], [CLENT_BANKACCOUNT_NO], [CLENT_BANK_CODE], JER_COMPANY_NAWE], [ISSUE_CONTANY_MANE_SHORT], [ISSUER_CONTACT_NAME], STREET, JISSUEL ZP3, [ISSUEL_CITY3, [ISSUER_CONTRY], ISSUER_CONTRY],
CLIENT_COMPANY_ID], [CLIENT_ CLIENT_MOBILE], [CLIENT_FAX] CLIENT_BANK_NAWE], (CLIENT_ SSUER_CEO_NAWE], (ISSUER_V SSUER_CEO_NAWE], (ISSUER_)	CUSTOWER NOS, (CLIENT, WAT, JOS, (CLIENT, STREET), (CLIENT, (CLIENT, ENAL), (CLIENT, INTERNET), (CLIENT, ECO, (CLIENT), ENHACCOUNT, ENAN), (CLIENT, BANKACCOUNT, SWIFT) (): (DSI AT, JOS, ISSUER, TAX, JOS, (SSUER, COMPANY, REGISTER), (DSILE ANAL), (SSUER, DANL), (SSUER, LINEINACCO (SSUER, BANKACCOUNT_SWIFT), (SSUER_CREDITOR_ID) invoice	ZP3, [CLENT_CITY3, [CLENT_STATE], [CLENT_COUNTRY], [CLENT_TELEPHONE], NOTES], [CLENT_BANKACCOUNT_OWNER], [CLENT_BANKACCOUNT_NO], [CLENT_BANK_CODE], JER_COMPANY_NAWE], [ISSUE_CONTANY_MANE_SHORT], [ISSUER_CONTACT_NAME], STREET, JISSUEL ZP3, [ISSUEL_CITY3, [ISSUER_CONTRY], ISSUER_CONTRY],

If an email template is selected, then the *Subject* and *Message* fields are already filled with the text of the template. You can customize the message text and then send it by clicking on *Send Email*. The invoice will automatically be attached as PDF file.

The blue marked variables can be used in the subject and message text of the email. This is especially useful for email templates.

If you save the message as a draft, you can call it again at a later date by using the menu item *Messages > Email messages* and send it.

#### 4.2.3 Duplicate Invoice

The duplication of invoices is done via the Action menu in the invoice list.

IV20110009	2016-03-03	Tom Test (tom, C2)	9,5200 EUR	No	Yes	No	No	No	PDF Involce	۲	교
------------	------------	--------------------	------------	----	-----	----	----	----	-------------	---	---

A click on the button with the blue arrow icon displays the invoice action menu.



Select a invoice action				
Send PDF file by email	$\odot$	Standard invoice email	-	
Send invoice reminder	$\odot$			
Got chargeback	$\odot$			
Duplicate invoice	۲			
Refund invoice	$\odot$			
📀 Next 🔞 Cancel				

Select *Duplicate Invoice* there and click on *Next*. This will automatically create a new invoice draft, which contains all items from the original invoice.

## 4.2.4 Canceling Invoices / Refunding Invoices / Creating Credits

Invoices will be canceled on the Action menu in the invoice list.

IV20110009	2016-03-03	Tom Test (tom, C2)	9.5200 EUR	No	Yes	No	No	No	PDF Invoice	۲
------------	------------	--------------------	------------	----	-----	----	----	----	-------------	---

A click on the button with the blue arrow icon displays the invoice action menu.

Select a invoice action	
Send PDF file by email	Standard invoice email
Send invoice reminder	
Got chargeback	
Duplicate invoice	1
Refund invoice	1
Next S Cancel	

Select *Refund Invoice* there and click on *Next*. This will automatically create a new credit based on the invoice. The credit can be edited before saving.

### 4.2.5 Invoice Reminders / Send Payment Reminders

Reminders are created on the Action menu in the invoice list.

IV20110009	2016-03-03	Tom Test (tom, C2)	9.5200 EUR	No	Yes	No	No	No	PDF Invoice	1
------------	------------	--------------------	------------	----	-----	----	----	----	-------------	---

A click on the button with the blue arrow icon displays the invoice action menu.

Select a invoice action		
Send PDF file by email	$\bigcirc$	Standard invoice email
Send invoice reminder	۲	
Got chargeback	$\odot$	
Duplicate invoice	$\odot$	
Refund invoice	0	
🐼 Next 🔞 Cancel		

An invoice reminder gets created as a draft, based on this invoice. The reminder can be edited before sending like an invoice. Reminders can be viewed and edited trough the menu point "Reminders" in the menu on the left side.

#### 4.3 Proforma Invoices

Proforma invoices are similar to invoices, but they do not have an invoice ID assigned. They are used in many European countries as demand bill. Proforma invoices can be created either in this section or while creating a recurring invoice. More to that in chapter 5.2.

ISPConfig										Q, 80		OGOUT ADAIN
Hanse Syttem	Billing Cia	nt DHS	Re lp	() Drail	Mantar	Sites	X Tools	VServe	,			
Home	Proform	a invoices										
Destocard												
Client	Tools											
Add Olient												
Dient Hit	Add new re	cord										
invoice	Proforma involce											
india	Protonta Invoice	2										
rvalces	Proforma No.	Date	Client			Tetal		Seet	Printed	Paid 1	15 1	-
huforna invoices					w.		_				(T)	
keflands					•							
leninders	PR20110002	2016-02-05	Tom Test	(ton, C2)		34,5100 EU	8.	No	Yes	No		2.
Recurring												
feranting item						Page 1						
Nake Involces						vage 1						

A proforma invoice can be converted to a regular invoice by clicking on the action menu in the proforma invoice list:

IV20110009 2016-0	3-03 Tom Test (tom, C2)	9.5200 EUR	No	Yes	No	No	No	PDF Involce	💌 🖬
-------------------	-------------------------	------------	----	-----	----	----	----	-------------	-----

Select "Make new invoice based on proforma invoice" and click on Next to go to the newly created invoice.

Send PDF file by email	- No email template -
Send invoice reminder	0
Duplicate invoice	0
Make new invoice based on proforma invoice	۲
🐼 Next 🔞 Cancel	

### 4.4 Refunds / Credits

Select a invoice action

Clicking the menu item *Refunds* opens the list of created refunds/credits.

ISPConfig										Q_ Set		LOGOUT ADMIN
Home System	Billing Cis		Ref p	Dread.	Monitor	Sites	× Teofs	15erver				
Home Darbboard	Refunds											
Client	Tools											
Add Client												
Cilent Ust	Add new re	icord										
Invalce	Refunds											
Drafto	NPT-2121											
involues	Refund He.	Date	Client				Total	Sent	Printed	Paid	15	
Proforma Involces												_
Refunds				-					-	-	- ( <u>T</u> )	
Remtinders	RF20110002	2015-02-05	John Doe in	o, n John Doe (j	ohndoe, CI)		-166.6000 EUR	No	Yes	No		2
Recurring												-
Recurring item												
Make Involves						Page 1						

Through the button Add new record a new refund/credit is created. Editing the refund/credit is done in the invoice editor as described in Chapter 4.2.1. The type of invoice is Refund.

To create a refund/credit based on an existing invoice, see chapter 4.2.4.

#### 4.5 Reminders

Clicking the menu item *Reminders* opens the list of created Reminders. Reminders get created trough the action button in the invoice list, see chapter 4.2.5.

ISPConfig												Q, 8ea	th	LOGOUT AG
Home System	Billing	Client	4	Ref p	inal.	Noritor	Sites	X Taals	VServe	H				
forme	Rem	inders												
Deshboard														
Olient	Reminde	0												
Add Cilent													_	_
Client likt	Involue 8	e. Dete		eminder Step	Client			Total	_	Sent	Printed	Paid	15	
rivaice						-				-	-	-	<b>T</b>	
vats	0/20110	2016-0	1. AF 1		John Pers Inc.	u John Dee (jah	adapt 210	196,000		No	No	No	-	-
moloco	1420110	100 10101	11-000		John Me Inc.	in John Dee Qui	nooe, city	100.000	0 BOK	1980	PRO	140		1
toforma involues														
arfunds							Page 1							
Remtinders														

### **5** Subscriptions

Under the menu item *Recurring*, functions for recurring invoices are grouped. A subscription or recurring item may be a web space billed on a monthly basis, a yearly domain fee or a service such as a support contract. The ISPConfig 3 Billing Module is designed specifically for billing of recurring payments so that all items that are due for payment are automatically grouped in one

invoice (see also 5.2).

### 5.1 Recurring Item

Here you will find a list of existing recurring items for clients. Through the *Add new record* button, new recurring items such as support contracts can be created. There is also the possibility of having new items created automatically through the link to the ISPConfig client templates when a client is assigned a new template in ISPConfig.

ISPConfig								G, Seat		XXXII ADMIN
Hone System	Billing Client		🥘 🧭 Help Erusi	Mavitar	Sites	X Taols	Vierver			
Hame	Recurring in	voice iter	ms							
Decificoend	incouring in	in one of the								
Client	Teeb									
Add Client										
Client But	Add new record									
Invoice	Recurring involce item									
bats	Necarring Invoice Iters									
avoices	Active Type	Harte	Part	nt Ren Olent			Price	Next payment	15 💌	
Proforma involoes									(T)	
letunds					-					
lexinders	😔 Donaio	john-doe-inc.ti	4	John D	ee inc. :: John De	e (johndoe, Cl	6.2000 01/8	2017-02-05	•	
Recurring										
locarring form					Page 1					
Nake Involces					1000					

To create a new item click on Add a new record.

#### Recurring invoice item

Item

Company	test corp *
Client	John Doe inc. :: John Doe (johndoe, C1)
Parent item	*
Item template	- no template - 👻
ltem (name)	john-doe-inc.tld
Description	Registration of the Domain (ITEMNAME) from (FROMDATE) until Variables: (JTEMNAME) (FROMDATE) (TODATE) (TODATE).
Quantity	1
Price (net)	6 2000 EUR
One-time Setup Fee (net)	0.0000 EUR
VAT	19.0000 %
Recurs every	12 months
Pay in advance	8
Туре	Domain 👻
Next payment	2017-02-05 (yyyy-mm-dd)
Start date	2016-02-05 (yyyy-mm-dd)
End date	(yyyy-mm-dd)
Cancellation Period	0 days
Send email reminder 🛛 🔞	days
Active	2

Company: Company, through which the item is billed.

Client: Client, which the item is assigned to.

**Parent Item:** If this item is a sub-item of another Item (e.g this is a domain that belongs to a website), then you can define that relationship here. The relationship is used to cancel sub items automatically when the parent item gets canceled.

**Item template:** By selecting an item template the remaining fields are filled in. This facilitates the creation of recurring items. The field contents remain editable.

Item (name): Title of the item, e.g. the name of the domain.

**Description:** Description of the item as used in the invoice. The following placeholders can be used: {*ITEMNAME*} will be replaced by the name of the item, {*FROMDATE*} will be replaced by the start date of the billing period and {*TODATE*} by the end date of the billing period.

Quantity: Quantity of billed items.

**Price:** Item Price (net).

**One-time Setup Fee (net):** Here you can set a one Time setup fee for this item. This fee gets charged once when the item is invoiced the first time.

**VAT:** VAT, which should be applied to the item.

**Recurs every ... months:** The billing of the item will be every X months.

Pay in advance: The item is charged at the beginning of the billing period.

**Type:** Type of item. This setting is only used to categorize items and has no impact on their billing.

**Next payment:** Due date of the next payment.

Start date: Creation date of the recurring item.

**End date:** The item is no longer billed after the date used in this field. This field can remain empty.

**Cancellation Period:** The cancellation period of this item in days. The cancellation period is used to display the next possible cancellation date to the client in the product dashboard.

**Send email reminder:** This function can be used to remind a customer upfront to a renewal. The value is in days. If you like to send several reminders, then separate the days by comma. E.g. "7,14" will send a reminder 14 days and a second one 7 days before the item renews.

Active: Allows you to disable the item. A disabled item will not be charged.

#### 5.2 Make Invoices

Via the menu item *Make invoices* the creation and shipment of PDF invoices for recurring items takes place.

Create recurring invoices	
Until date	2016-03-03 (yyyy-mm-dd)
Send invoices by email	Standard invoice email
Finalize invoices	
Create proforma invoices	
Dry run	
Start Scancel	

Until date : All recurring items due on or up to the specified date will be charged.

**Send invoices by email:** If this box is set and an email template is selected, then all created invoices will be sent as email. The prerequisite is that the option *Complete Invoice* is also selected.

**Finalize invoices:** The created invoices will be finalized and created as a PDF file. If this option is not selected, the calculations are stored only in draft form and can not be sent automatically by email.

**Create proforma invoices:** Checking this box will create a proforma invoice additionally to the common invoice which goes without VAT code.

**Dry run**: If *Dry run* is enabled the creation of invoices will be simulated only when you click the *start* button. No invoices will be saved or shipped.

By clicking the *Start* button the billing cycle starts.

#### Create recurring invoices

Until date	20	6-03-03 (yy	yy-mm-dd)	
Send invoices by email		Standard invo	oice email	•
Finalize invoices	1			
Create proforma invoices				
Dry run				
Dry run Added item john-doe-inc.tld of type dor Finalized the invoice draft #10. Finished.	main	to the invoice	e draft #10.	
Start Scancel				

#### 6 Messages

In this menu, you will find the functions for sending email notifications.

### 6.1 Email Messages

Via the menu item *Email messages* you get to the list of notifications created through the ISPConfig Billing Module.

ISPConfig					LOGOUT ADMIN
hosting control panel.					Q. Search
Honee System	Billing Chent Di	6 Help Email	Honitor Sites	Tools VServer	
Home	Message				
Dashboard	Be				
Client	Teels				
Add Client					
Client lbt	🕥 Add new record				
Invoice	Resulte				
Orafts	an order				
involoni	24+	clima		Tabject	15 -
Proforma involoes			-		
Refunds					T
Reminden	2016-02-05	John Dee Inc. 1: John D	ee (johndoe, C1)	Year Involce	•
Recurring					
Recurring Item			Page 1		
Aake involces			rage 1		
Messages					
Enellincorpo					
Send involce reminders					
Email templates					
Tools					
Recurring Item Import					
Reset Involce-counters	_				
Settings					
item template					
Payment terms					
Company					
Gabal settings					

Clicking the Add new record button will open the editor to create messages.

#### Email message

Nessage

iender	test corp	*
lecipient	Tom Test (tom, C2, tom@tester.tld)	· ·
emplate	- No template -	*
CLIENT_COMPANY_IDJ, (CLIEN CLIENT_NOBILE), (CLIENT_FA CLIENT_BANK_NAWE), (CLIEN SSUER_CEO_NAWE), (ISSUER SSUER_TELEPHONE), (ISSUER	<pre>it_customer_no), (client_wt_o), (client_street), (client_) xq, (client_baals, (client_intErnet), (client_cq), (client_n T_innkaccount_inan, (client_barkaccount_swtT) = (850 _vt_o), (ssuer_tac_o), (ssuer_comman_register, (ssuer_ vt_o), (ssuer_tac_o), (ssuer_comman_register, (ssuer_tac_o))</pre>	NICE PAY_UNK] # (CUENT_SALUTATION), (CUENT_CONTACT_NAWE), (CUENT_COMPANY_NAWE) (P), (CUENT_CITY), (CUENT_STATE), (CUENT_COMPANY_NAWE), (CUENT_TELEPHONE), (OTES), (CUENT_BANKACCOUNT_OWNER), (CUENT_BANKACCOUNT_NO), (CUENT_BANK_CODE), COMPANY_NAND, (BSUEN_COMPANY_NAME, SHORT), (BSUEN_CONTACT_NAME), STREETJ, (BSUEN_ZIP), (BSUEN_CITY), (BSUEN_STATE), (BSUEN_COUNTRY), NT_OWNER), (BSUEN_BANKACCOUNT_NO), (BSUEN_BANK_CODE), (BSUEN_BANK_NAME),
essage		
wishes: INVOCE NUMBER	S DIVINE ANCINT, INVESTIGATION OF DATE ON	NUCL BY UNKLY IN BUT SAUTATION ACIENT CONTACT NAMES IN BUT COMMANY NAME
LIENT_COMPANY_IDJ, [CLIEN LIENT_MOBLE], [CLIENT_FA LIENT_BANK_NAWE], {CLIEN SSUER_CEO_NAWEJ, {SSUER_ SSUER_CEO_NAWEJ, {SSUER_ SSUER_BANKACCOUNT_JEAN	HT CUSTOWER NOU, SCLEHT _ VAT_DD, (CLEHT _ STREET), (CLEHT _ X), (CLEHT_BHAL), (CLEHT_INTERNET), (CLEHT_JC), (CLEHT _ LANNACCOUNT_BANK, (CLEHT_BANKACCOUNT_SWFT) =: (SSL _ YAT), (DSUER_TAL, (D), (SSUER_COMPANY_REGISTER), (SSUER _ FAX), (DSUER_BHAL), (SSUER_COMPANY_REGISTER), (SSUER _ FAX), (SSUER_BHAL), (SSUER_COMPANY_REGISTER), (SSUER_ ), (DSUER_BANKACCOUNT_SWFT), (SSUER_CREDITOR_D)	COCC_PAY_LINK) #: [CLENT_SALUTATION], (CLENT_CONTACT_NAME), (CLENT_COMPANY_NAME), [P9], (CLENT_CITY), RCLENT_STATE, ICLENT_CONTRY, ICLENT_TELEPHONE), OFES, ICLENT_SANKACCOUTT_ONDEN, ICLENT_BANK_COOE], COMPANY NAME, ISSUER_COMPANY_NAME_SHORT, ISSUER_CONTACT_NAME), STREET), (ISSUER_LEN, ISSUER_CITY), ISSUER_STATE), ISSUER_CONTACT_NAME), NT_OWNER], ISSUER_BANKACCOUNT_NO), ISSUER_BANK_CODE), ISSUER_BANK_NAME),
LIENT_COMPANY_IDJ, (CLIENT_BAL LIENT_IMOBILE), (CLIENT_BAL LIENT_BANK, NAME), (SLIEN SSUER_CEO_NAME), (ISSUER SSUER_CEO_NAME), (ISSUER SSUER_BANKACCOUNT_IBAN APPE	HT_CUSTOWER_NOD, SCLEHT_VAT_DD, SCLEHT_STREET, SCLEHT_ X3, SCLEHT_BHALE, SCLEHT_INTERNETJ, SCLEHT_JCQ, SCLEHT_J RANKACCOUNT_BANK, SCLEHT_BANKACCOUNT_SWFT) =: (650, VAT_DD, (650UE) TAA. (D), (650UE) COUNTAINY REGISTER, ISSUE FAX), (650UE DIAL), (650UE), NTERNET, (650UE), BANKACCOU ), (650UE), BANKACCOUNT_SWFTJ, (650UE), CREDITOR_DD) other	OTES, ICLIENT BANKACCOUNT, OWNER, ICLIENT BANKACCOUNT, MO, ICLIENT BANK_CODE, ER, COMPANY NAME, ISSUER, COMPANY NAME, SHORT, ISSUER_CONTACT, NAME, STREET, (SSUER, ZP), ISSUER, CITY, ISSUER, STATE, ISSUER, COUNTRY,
CLIENT_COMPANY_ID], [CLIEN CLIENT_NOBILE], [CLIENT_FA CLIENT_BANK_NAWE], (CLIEN SSUER_CEO_NAWE), (SSUER SSUER_TELEPHONE), (SSUER	HT CUSTOWER NOU, SCLEHT _ VAT_DD, (CLEHT _ STREET), (CLEHT _ X), (CLEHT_BHAL), (CLEHT_INTERNET), (CLEHT_JC), (CLEHT _ LANNACCOUNT_BANK, (CLEHT_BANKACCOUNT_SWFT) =: (SSL _ YAT), (DSUER_TAL, (D), (SSUER_COMPANY_REGISTER), (SSUER _ FAX), (DSUER_BHAL), (SSUER_COMPANY_REGISTER), (SSUER _ FAX), (SSUER_BHAL), (SSUER_COMPANY_REGISTER), (SSUER_ ), (DSUER_BANKACCOUNT_SWFT), (SSUER_CREDITOR_D)	(P), (CLERT_CITY), (CLERT_STATE), (CLERT_COUNTRY), (CLENT_TELEPHONE), OTES), (CLERT_BANKACCOUNT_OWNER), (CLERT_BANKACCOUNT_NO), (CLERT_BANK_CODE), ER_COMPANY_NAME, (DSSUER_COMPANY_NAME_SHORT), (DSUER_CONTACT_NAME), STREET), (SSUER_ZP), (SSUER_CITY), (SSUER_STATE), (ISSUER_COUNTRY).

Sender: Sender of the message.

Recipient: Recipient of the message. In parentheses, the recipient email address is displayed.

**Template:** selection of an email template (optional). By selecting a template, the fields *Subject* and *Message* will be filled in automatically.

Subject: Subject of the email.

Message: Text of the email.

**Type:** The type is selected using the email template. It is used to categorize the messages. If no template is used, the type is *Other*.

Date: Creation date of the email.

Status: Delivery status of the message.

#### **6.2 Sending Admonitions**

Via the menu item *send invoice reminders* you reach the automatic dunning process of the ISPConfig 3 Billing Module.

ISPConfig									Q, Search	
Honse System	Billing	Client DHS		Drail	Manitar	Sibes	X Teals	) VServer		
tome										
Sachboard	Send inv	oice reminders								
Client										
Add Dient:		involce number	Heat new	inder step	involon/rem/	nder date	Due o	<i></i>	Client	_
Dient list	8	N20110002	1		2015-10-10		2015	10-25	Tom Tester	
esioval	8	N20110003	1		2015-11-07		2015	11-22	Tom Tester	
bans		N20110004	1		2015-12-29		2016	-01-13	Tom Tester	
involces .		N20110005			2016-01-14		2014	-01-29	Ion leter	
Proforma Involces										
Refunds Reminders	8	IV20110006	1		2016-02-05		2016	-62-20	Muster GribH :: Max Methhard	
	10	PR20110002	1		2016-02-05		2016	-02-20	Tom Texter	
Recurring	10	8520110002	1		2016-02-05		2015	-02-20	Matter GribH :: Max Meinhard	
Recurring Ibem Nake Involces										
Wessages										
inali mesages	Ernall te	replate	<ul> <li>Select</li> </ul>	template -			*			
end involce reminders										
trivit templates	_									_

Here are listed all the invoices that are marked as unpaid and whose payment period is exceeded at the same time. To send the admonitions you select an email template and click the *Send reminders for selected invoices* button. If you do not want to send admonitions for certain invoices, you can deselect these invoices in the list.

### 6.3 Email Templates

Here you will find the list of email templates.

ISPConfig			Q, Search
Home System		🞗 🧭 📙 🐼 💥 📔	
Home	Email templates		
Deshboard			
Client	Tools		
Add Cilent	Add new record		
Cileert läst	And the real of the		
Invoice	Email templates		
Drafts			
rwokes	message for	Template name	15 💌
hoforma inverces			(T)
Refunds Reminders			
Recurring	Invalice	Standard Invoice email	•
Recurring term	Reninder	Standard invoice email reminder	•
Make Involves			-
Messages	_	Page 1	
Email mesages		Page 1	
Send invoice reminders			
Email templates			
Tools			
Recurring Ram Import			
Reset involce counters			
Settings			
ten template			
Regiment terms			

By clicking on the Add new record button a new email template will be created.

mail type	Invoice	*
emplate name		
CLIENT_COMPANY_D], (CLIE CLIENT_WOBILE), (CLIENT_F/ CLIENT_BANK_NAWE), (CLIE) SSUER_CEO_NAWE), (ISSUER SSUER_TELEPHONE), (ISSUE	NT_CUSTONER_NOJ, (CLIENT_VAT_ID), (CLIENT_STR XX), (CLIENT_ENALI), (CLIENT_INTERNET), (CLIENT_INTERNET), (CLIENT_INTERNET), (CLIENT_INTERNET), (CLIENT_INTERNET), (SSUER_COMMANY_REC (VAT_ID), (ISSUER_TAX_ID), (ISSUER_COMMANY_REC	KE DATEJ, (INVOKE PAY LINK) II (CLENT SALUTATION), (CLENT CONTACT NAME), (KLENT COMPAN ET), (CLENT ZIP), (CLENT CITY), (CLENT STATEJ, (CLENT CONTATT), (CLENT TELEPHONE), CQ), (CLENT, NOTES), (CLENT ENVIRACCOUNT, NO), (CLENT ENVIRACCOUNT, COMPRE, (CLENT ENVIRACCOUNT, COMPRE, (CLENT ENVIRACCOUNT, MANE, SORT) STET) = (SSUER COMPANY MANE), (SSUER CONTANY, MANE SHORT), (SSUER CONTACT MANE), STER), (SSUER, STREET), (SSUER_ZIP), (SSUER_CTY), (SSUER_STATEJ, (SSUER_COUNTRY), R, RANKACCOUNT_COMPRE), (SSUER_ENVIRACCOUNT_NO), (SSUER_BANK,CODE), (SSUER_BANK,MANE)
lessage		
LIENT_COMPANY_ID], {CLIE LIENT_MOBILE], {CLIENT_R LIENT_BANK_NAME], (CLIE SUER_CEO_NAME], (SSUER	NT_OUSTONER_NO}, (CLIENT_WT_ID), (CLIENT_STR WS, (CLIENT_EMAL), (CUIENT_INTERNET), (CLIENT_ NT_BANKACCOUNT_IBANI, (CLIENT_BANKACCOUNT (_VAT_ID), (ISSUER_TAX_ID), (ISSUER_CONINNY_REC	KE_DATE), [HVOKE_PAY_LINK] #: [CLEHT_SALUTATION], [CLEHT_CONTACT_NAME], [CLEHT_COMPAN TET), [CLENT_ZIP], [CLENT_CITY], (CLENT_STATE], [CLENT_CONTRY], [CLENT_TELEPHONE) CO, [CLENT_NOTES], (CLENT_BANKACCOUNT_OWNER), (CLENT_BANKACCOUNT_MON, [CLENT_BANK SMET] #: [DSUER_CONTANT_NAME], [SSUER_CONTANT_NAME, SHORT], [SSUER_CONTACT_NAME], STERJ, [SSUER_STREET], [SSUER_ZIP], [SSUER_CONTRY], [SSUER_CONTRY], [CLANKACCOUNT_OWNER], [SSUER_ZIP], [SSUER_CONTRY], [SSUER_CONTRY],

**Email type:** Type of the email for which this template can be used. The options are:

- Invoice: Template for sending invoices.
- *Refund*: Template for invoice-related credit notes.
- *Reminder*: Template for payment reminders.
- -*Chargeback*: Template for chargebacks.
- Other: Template for other emails.

Template name: Name of the template.

**Subject:** Subject of the email. Available placeholders are listed below the subject field, click on a placeholder to insert it into the subject line.

**Message:** Message text. Available placeholders are listed below the message text field, click on a placeholder to insert it into the message text.

## 7 Tools

Tools and enhancements for the Billing Module.

#### 7.1 Import

Import function for recurring items. The file to be imported must be in CSV format.

ISPConfig						LOGOUT ADMIN 🛛
Home System	Billing Client	🔏 🥘 DeS Help	Cruel Novitor	Sites X	VServer	
Home						
Dashboard	Recurring Item Import					
Client						
Add Cilent	File	Date: excvr8	hien Keine ausgewählt			
Cilent Lbž.	Overwrite					
Involce						
Drefts						
Involors						
Proforma Involces						
Refunds						
Reminden						
Recurring						
Recurring item						
Make invoices						
Hexages						
Emol, mesages						
Send trivolice reminders						
Email. templateo						
Tools						
Recurring item import						
Reset involce counters						
Sottings						
Item template						
Payment terms						
Company						
Global settings						

The format of the import file is as follows:

Item name; Start date; Next payment domain.tld; 01.01.2010; 01.01.2011 domain2.tld; 01.01.2010; 01.01.2011

The first line will not be imported.

#### 7.2 Reset invoice counters

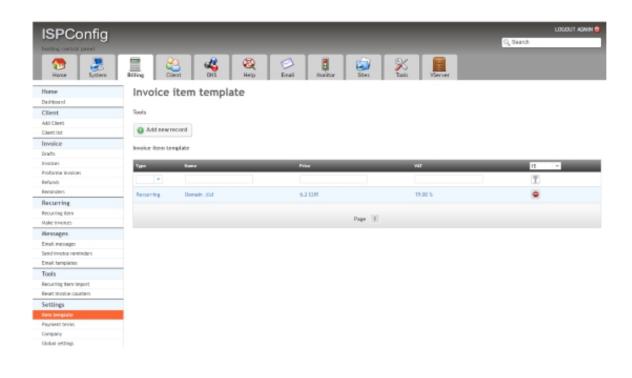
This function is used to reset all customer invoice counters (e.g. when you like to start with invoice number 1 at the beginning of each year).

ISPConfig				LOCOUT ADMIN 😸
Home System	Billing Client DNS	Rep Enal Voritor Sites	Tools VServer	
Home				
Dashboard	Reset involce counters			
Client				
Add Cilent	Company	All companies	-	
Cilent list	Reset company-specific invoice	0		
Invaice	-	0		
Drafts	Reset company-specific refund counter			
Involues	Reset company-specific proforma	8		
Proforma Involces	involce counter 🕕 🕕			
Refunds				
Reminders	Reset client-specific invoice counter			
Recurring	Reset client-specific refund counter	0		
Recurring item	0			
Make Involces	Reset client-specific proforma	0		
Nessages	involce counter			
Email, mesages				
Send involce reminders				
Email. templates				
Tools				
Recurring item import				

# 8 Settings

## 8.1 Item Template

Via the menu item *Settings* > *Item template*, you get to the list of item templates. Item templates are used to simplify the creation of items in invoices and the creation of recurring items.



To create a new item template, click on Add new record.

#### Invoice item template

Type	Recurring	2 -		
Name	Domain t			
Description	Registrat until (To	tion fee for the domain {ITEMNAME} from {FROMDATE}	Variables: (ITEMNAME) (FROMDATE) (TODATE	
Price (net)	6.2000	EUR		
One-time Setup Fee (net)	0.0000	EUR		
AT	19.0000	%		
Init	Item	*		
ecurring Months	12			
ancellation Period	30	days		
connected with client template	None -	-	(applies only to recurring templates)	

#### **Description of the Input Fields:**

**Type:** The type describes the type of the template.

- *Recurring*: Template for recurring item subscriptions.
- *Item*: Template for items in invoices.
- *Service*: template for services; can also be used in invoices.

Name: Name of the item template.

**Description:** Description of the item as it appears on the invoice. It is possible to use placeholders: {*ITEMNAME*} will be replaced by the item name, {*FROMDATE*} will be replaced by the start date of the billing period and {*TODATE*} by the end date of the billing period.

Price: Item price (net).

**One-time Setup Fee (net):** The one-time setup fee that shall be charged on first invoice run of an recurring item.

**VAT:** VAT to be applied to the item.

Unit: Used to distinguish between items (piece) and time periods (hour / half hour).

Recurring Months: The items will be billed every X months.

Cancellation Period: The cancellation period of this item.

**Connected with client template:** This selection allows you to connect an item template with an ISPConfig client template. This allows automatic billing of ISPConfig client templates using the Billing Module (optional, only for recurring items). If a client is assigned a new template in the ISPConfig client module, then a recurring item is created automatically in the Billing Module based on the template associated to the field *Connected with client template*.

On the **Shop** tab you will find the settings to show the invoice item template as an article on the ISPConfig client dashboard. There the client can buy this item directly from within his ISPConfig login.

Item Shop	-				
Offer in shop					
itandalone Product?	2				
Addon?					
Jp-/Downgrade possible?					
Custom Input Field					
nternal Designation:					
ame (value of the name attribute):					
abeli					
ype:	TECT	-			
equired?	No	-			
Default Value:					
Panition:	0	-			
ktive:	Yes				
alidator 1:	<ul> <li>Validator 1 - Erro</li> </ul>	r Message:			
alidator 2:	<ul> <li>Validator 2 - Erro</li> </ul>				
alidator 3:	- Validator 3 - Erro				
alidator 4	Validator 4 - Erro	v Messagei			
alidator 5:	- Validator 5 - Erro	r Message:			
🚱 Save					
Save.					
lame Label	Type	Required?	Position	Active	

#### **Description of the Input Fields:**

**Offer in shop:** The article is visible in the shop dashlet on the client desktop in iSPConfig when this checkbox is enabled.

**Standalone product:** This option has to be enabled when the articles does not depend on other articles.

Addon: When this checkbox is active, then the article is an add-on of another article.

**Up-/Downgrade possible?:**This option describes if an Up- or Downgrade is possible with this article.

**Custom Input Fields:** Here you can add additional input fields for an article. The input fields will show up in the shopping cart in the client login when this article is purchased. The details that the client enters into the fields get send to the administrator as part of the order email.

### 8.2 Terms of Payment

Under the menu item *Settings* > *Payment terms* you will find the list of all payment terms.

ISPConfig						LOCOUT ADMIN
Home System	Billing Cla		🥹 🧭 Help Enel	Noritor Sites	Tools VServer	
Home	Payment	t terms				
Deshboard						
Client	Tools					
Add Gient	Add new re	troot				
Client list	- HOLINA II					
Invoice	Payment terms					
Drafts						
Involoes Proforma involoes	Hame		Dar (days)		Description	15 +
Refunds						( <u>T</u> )
Reminders	Net 3D days.		30		Net 3D days	
Recurring					The same stages	
Recurring Item	15 d		15		15 d	•
Make Involces	60 d	Þ	60		60 d	•
Messages		*				-
Email messages						
Send Involce reminders				Page 1		
Email templates						
Toola						
Recurring Rem Import						
Reset Involce counters						
Settings						
Item template						
Payment terms						
Сотралу						
Globel, settings						

Using the Add new record button, you can create a new payment term.

Payment terms	S	
Name	Net 30 days	
Description	Net 20 days	
Invoice Explanation		Variablen: (COMPANYBANKACCOUNTOWNER) (COMPANYBANKACCOUNTINO) (COMPANYBANKCOOF) (COMMANYBANKAME) (COMPANYBANKACCOUNTINAN) (COMPANYBANKACCOUNTSWIFT) (COMPANYBABENTORID) (CLIENTBANKACCOUNTING) (CLIENTBANKACCOUNTINO) (CLIENTBANKACCOUNTING, ANON) (CLIENTBANKACCOUNTSWIFT) (CLIENTBANKACCOUNTSWIFT, ANON) ~ (DUEDAYS) (MANDATEREFERENCE) (COLLECTIONDATE)
Due (days)	30	
Email Template	Standard invoice email.	*

#### **Description Of The Input Fields:**

Name: Name of payment term, as it appears in the lists.

Description: Text of the payment term, as it appears on the invoice.

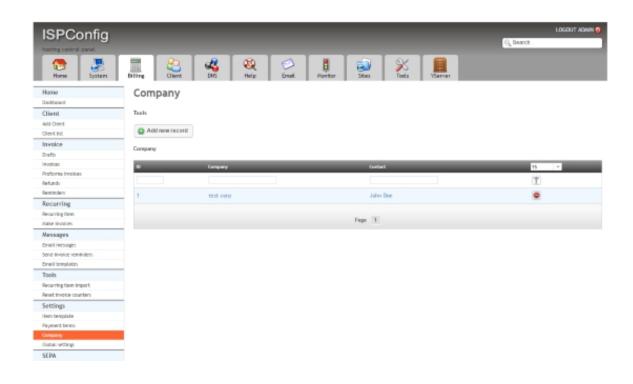
Invoice Explanation: An extended description text that appears at the end of the invoice.

**Due (days):** Maturity of the invoice in days. This value is used for the calculation of due dates in the dunning process, it will not appear on the invoice. For example, you can specify a maturity of 32 to take into account the processing time at the bank, while the text on the bill is *Net 30 Days*.

**Email Template:** The email template that is used to send invoices with these payment terms when using the automatic invoice sending feature.

### 8.3 Company

Via the menu item *Settings* > *Company* you reach the company preferences. Company means the invoice sender here. Each company has its own invoice number range.



By using the Add new record button, you can create a new company.

ompany name ompany name (short) ontact name	test corp			
ontact name				
	John Do	e		
reet	Mainstre	Mainstreet 12		
p	12345	12345		
ty	The City	The City		
ate	MyState	MyState		
ountry	German	Germany		
nail	info@tes	info@test.tld		
ternet	www.test	www.test.8d		
lephone	1234-56	1234-5678		
sx.	1234-56	1234-5678		
ogo				
EO name	John Do	John Doe		
AT ID	DE0000	DE0000000		
XX no.				
ompany register no.	HRB000	HRB0000		
ank account owner				
ank account no.	12345	12345		
ank code	1234567			
ank name	Bank	Bank		
AN	12345	12345		
C / Swift	12345	12345		
reditor ID (SEPA)				
ast invoice number	9	9		
voice number prefix or pattern 🧕	IV2011	N2011		
ist refund number	2	2		
efund number prefix or pattern 🧕	RF2011	RF2011		
ast proforma number	2	2		
oforma number prefix or pattern	PR2011	PR2011		
DF invoice template	default	default		
reate reminder PDF				
eminder steps	3			
eminder fee	0.0000	EUR		
eminder fee from step	1			
eminder payment terms	15 d			
ist reminder payment terms	15 d			
hargeback fee	0.0000	EUR		
nargeback payment terms	15 d	15 d 🔹		
and invoices using this sender				
end invoices using this sender mail address				
end invoice emails per BCC to this mail address				

#### **Description Of The Input Fields:**

Company name: Name of the company as it appears on the invoice.

**Company name (short):** Here you can fill in a short name for the company (optional). If you put a short name here, this short name is printed on the invoice in the address field in the upper right corner instead of the full company name. Please note that the full company name is still printed in the footer of the invoice.

Contact name: Name of contact person or owner.

Street, Zip, City, State, Country, Email, Internet, Telephone, Fax: General address data, this information will be used on the invoice.

**Logo:** Company logo as a file, you only specify the file name here. The file must be located in the directory /usr/local/ispconfig/interface/web/billing/lib/logo/. Only .jpg and .png files are supported. The max. file size is 420 pixels in width and 110 pixels in height.

**CEO name:** name of the CEO (optional).

VAT ID: VAT identification number (optional).

Tax no.: Tax number at the tax office (optional).

Company Register no.: Number in the Commercial Register (optional).

Bank account no., Bank code, Bank name, IBAN and BIC / Swift: Bank account details as they should appear on the footer of the invoice.

**Last invoice number:** Number of last invoice. This number is incremented automatically, you should put this number only when creating a new company or at the beginning of the business year if you use a date in the prefix.

**Invoice number prefix:** Prefix for the invoice number, for example: *RE* or *RE2011*. The invoice number that is visible to the client is combined from the invoice number prefix and the invoice number. Example: Prefix *RE2011* and invoice number *21* results in: *RE20110021*. The invoice number is padded with zeros to 4 digits.

Last refund number, Refund number prefix: Number of the last refund/credit or the prefix for refunds/credits. The functionality is analogous to the *Last invoice number* and *Invoice number prefix* fields.

Last proforma number, Proforma number prefix: Number of the last proforma invoice or the prefix for proforma invoices. The functionality is analogous to the *Last invoice number* and *Invoice number prefix* fields.

PDF invoice template: Determines the design of the PDF file the invoices will be printed on.

Create reminder PDF: This option enables the function to create reminders as PDF file.

Reminder steps: The number of reminder steps that you want to use.

Reminder fee: The reminder fee that the clients get charged.

**Reminder fee from step:** Charge the reminder fee beginning from the step that is defined here.

**Reminder payment terms:** The payment terms that get applied to all payment reminder steps except the last one.

Last reminder payment terms: Payment terms of the final reminder step.

Chargeback fee: The chargeback fee that the client gets charged in case of a chargeback.

Chargeback payment terms: Payment terms for the chargeback fee.

Send invoices using this sender name: The sender name that is used for the invoice emails.

Send invoices using this sender email address: The email address that is used for the

invoice emails.

Send invoices per BCC to this email address: Send outgoing emails by BCC to this address.

# 8.4 Global Settings

Under the menu item *Global settings* you will find the system-wide configuration of the Billing Module.

# Global billing settings

Settings Payment gateways	Cron Settings for Recurring Invoices
Currency	EUR
Invoice directory (optional)	
Show gross prices in Invoice item list (incl. VAT)	
Billing addon revision	REV-16

**Currency:** Name of the currency, you should use the 3- digit currency format, i.e. *USD*, *EUR*, *NOK*, etc.

**Invoice directory (optional):** Path to a server directory where the PDF invoices will be stored. Due to security reasons, this directory should not directly be accessible through a web server. If no directory is specified, the Billing Module uses the directory /usr/local/ispconfig/interface/invoices/

**Show prices in invoice item list with VAT:** Sums the price and the amount added by the VAT in the *sum* column of the invoice item list. The summed price is shown in the eventual invoice no matter if you check this option or not.

**Billing addon revision:** This is the version number of the Billing Module. Please include it in support requests, so that we know which version of the software you have installed.

link to payment page (otional)	and a film of the
aypal email	ispconfig@test1id https://www.paypal.com/cgi-bin/webscr
aypal URL	nps.//www.payper.com/cg-on/webaci
aypal notify URL (IPN) supal active	4
EPA CORE: Collection date for one- ff direct debits (TARGET days from late of invoice creation)	6 *
EPA CORE: Collection date for the ist direct debit in case of recurring irect debits (TARGET days from date f involce creation)	6 *
EPA CORE: Collection date for allowing direct debits in case of ecurring direct debits (TARGET days rom date of invoice creation)	a ≠
EPA COR1: Collection date for one- ff direct debits (TARGET days from ate of involce creation)	2 4
EPA COR1: Collection date for the ist direct debit in case of recurring irrect debits (TARGET days from date f involce creation)	2 *
EPA COR1: Collection date for ollowing direct debits in case of ecurring direct debits (TARGET days rom date of invoice creation)	2 *
EPA B2B: Collection date for one-off irrect debits (TARGET days from date f irrvoice creation)	0 -
EVA B2B: Collection date for the isst direct debit in case of recurring irect debits (TARGET days from date f invoice creation)	6 v
EPA B2B: Collection date for allowing direct debits in case of courring direct debits (TARGET days rom date of invoice creation)	3 *
emind clients of signing their SER andate (in the dashboard and per mail)	
end mandate reminder every x lays	7 *
CLIENT_CITY), (CLIENT_STATE), (CLIENT_BANKACCOUNT_NO), (CLIENT_BA ISSUER_COMPANY_NAME), (ISSUER_COMP ISSUER_STREET), (ISSUER_ZIP), (ISSUER_C	СОНТИСТ ИМИЕ, ІСІ.ІНТ. СОНИМУ ИМИЕ, ІСІ.ІНТ. СОНИМУ 16, ІСІ.ІНТ. СОНТИНТИ, ІСІ, ІСІ.ІНТ. ОТ. 16, ІСІ.ІНТ. ТЯТЕТТ, ІСІ.ІНТ. 2007. ОПИТОВ, ІСІ.ІНТ. ТЕЦИЧИОН, ІСІ.ОНТ. ИЛОВІА, ІСІ.ИНТ. ЈАЛА, ІСИ.ИТ. ДИЛА, ІСІ.ИТ. ИТ. 16, ІСІ. 17, СОВ. (ОЦИТ. 30 ИКАСОНТ. УЛИВ, ІСІ.ІНТ. ЗАМ. СОВ. ІС. ІНТ. 3447. МАЛИ САЛИ, ІСИ.ІНТ. ЗАМИСТИКТ, ЗАТИТТ, ІСІ. ТИ, ІБІ.ИНТ. ЗАТИЛ, ІБІЯЦИ. СОНИТИР, ІБІЯЦИ, ТЕЦИЧИСКИ, ІБІЯЦИ ДИЛА, ІБІЯЦИ ДИЛА, ІВІЯЦИ. ПИПАТТ, ІСІ. ТИ, ІБІЯЦИ, ГАПИТ, ІБІЯЦИ, СОНИТИР, ІБІЯЦИ, ТЕЦИЧИСКИ, ІБІЯЦИ, ИЛАЛ, ІБІЯЦИ, ИЛАЛ, ІБІЯЦИ, ІСІ.ІНТ. АЛИКАЦИ, І СОС. П. БЛЯНИ, КОНИЧКИ, ІБІЯЦИ, ІЦИНИЧСКИ, ІБІЯЦИ, ИЛАЛ, ІБІЯЦИ, ИЛАЛ, ІБІЯЦИ, ІМИКА, ІВІЯЦИ, ІМИКАЦИ, ІВІЯЦИ, І СОС. П. БЛЯНИ, КОНИЧКИ, ІБІЯЦИ, ІБІЯЦИ, ГЕЦИЧИСКИ, ІБІЯЦИ, ИЛАЛ, ІБІЯЦИ, ІМИКА, ІБІЯЦИ, ІМИКАЦИ, ІВІЯЦИ, ІМИКАЦИ П. К. СОД. ІБІЯЦИ, КОНИЧКИ, ІБІЯЦИ, ІВИКАТСКИТИТ, АМИ, ІВІЯЦИ, ІМИКАЦИЯ, ТАРТТ, ІБІЯЦИ, ІБІЯЦИ ІВІЦИ, ІМИКАЦИ Л
lessage of the mandate reminder	
CLIENT_CITY), (CLIENT_STATE), (CLIENT_L CLIENT_BANKACCOUNT_OWNER), (CLIENT ISSUER_COMPANY_NAME), (SSUER_COMP ISSUER_STREET), (SSUER ZIP), (ISSUER C	οστιστέ τουση, περιοτή στουποια τουπό, τρεμή το αστουποί τος περιοτή αυτοποιητούς που τη στο τος προγείας τη τ αναγγής τουση τη προτοποιη του που του του του του του του του του του τ

On the tab *Payment gateways*, you will find the settings for the automatic payment page for clients as well as your PayPal settings.

**Link to the Payment Page:** The ISPConfig Billing Module provides a payment page that clients can use to select a payment provider and make the payment. The URL for this payment page is automatically inserted into invoice emails through the placeholder {*INVOICE\_PAY\_LINK*}. If you do not want to use the payment page provided by the Billing Module, you can specify the URL of your payment page here. This URL will then be used for the placeholder {*INVOICE\_PAY\_LINK*} as well as in the billing plugin in your ISPConfig dashboard.

PayPal Email: Email address of the PayPal account that is used for billing purposes.

**PayPal URL:** This is the URL of the PayPal payment gateway. For real payments the following URL is used:

https://www.paypal.com/cgi-bin/webscr

If you want to test the system using the PayPal Sandbox, please use this URL:

https://www.sandbox.paypal.com/cgi-bin/webscr

PayPal notify URL (IPN): URL to the PayPal IPN script (see 9.1 for a detailed explanation).

**PayPal Active:** Enables the PayPal payment option.

**SEPA Collection days:** Here you can find the detailed settings for the different SEPA modes. The field contains the number of days that the money shall be collected from client after the invoice date.

**Remind clients of signing their SEPA mandate (in the dashboard and per email):** A SEPA mandate requires in Germany that the Mandate gets signed by the client and returned to you. This setting allows you to enable an automatic email reminder until he has returned the signed SEPA mandate.

Send mandate reminder every x days: The reminder interval for the SEPA reminder in days.

Subject of the mandate reminder: The email subject of the reminder email.

Message of the mandate reminder: The email message text of the reminder.

# Global billing settings

Settings	Payment gateways Cron Settings for Recurring Invoices		
Send invoice:	s by email		
Select templ	ate	Standard invoice email	-
Finalize invoi	ces	2	
Create profo	rma invoices		
Dry run			
Active			

The Billing Module is able to create invoices automatically with a nightly cronjob, it's the same function, just automated, that you can find under Recurring > Make invoices. The details of this cronjob can be configured here.

**Send invoices by email:** The newly created invoices will be sent to the client automatically by email when this option is set. This can be overridden for each client in client settings.

Select Template: Select the email template that shell be used for the invoice emails

**Create proforma invoices:** Invoices will be created as proforma invoices when this option is enabled.

Dry run: The system will perform a dry run, no invoices will be created.

Active: This option enables the automatic invoice cronjob.

# 9 SEPA

# 9.1 SEPA-Mandate

A SEPA Mandate is the written permission by the client to charge him by SEPA.

ISPConfig Notice control canel		Client	uis Dis	Q Help	Dref.	<b>B</b> Noritor	Ster	<b>X</b>	VServer		Q Sear	(h	LOGOUT	ALC AUX
Home	SEPA N	Aandat	es											
bashboard .														
Client	Teels													
Add Olient														
Dient Int	Add ner	wrecord												
Invoice	SEPR. Mandat	**												
Drafts	Servi Marian													
invatore	Astim	Type		Client				Mandale Refer		Tiputare Date	lipsed	15	-	
Proforma Involoes			v							_				
Refunds						•						T.		
Reminders		SEFA COR	E Direct Debit	John	Doe inc. :: Je	hn Doe (jehndor	r, C1)	k12345-1		2016-02-06	•	۰ 🖻		
Recurring														
Recurring item							Page 1							
Nake involces							rage 1							
Messages														
Email messages														
Send Involce reminders														
Email templates														
Tools														
Recurring Item Import														
Reset invoice counters														
Settings														
tem template														
Nyment terms														
Company														
Global settings SEPA														

At the menu SEPA > SEPA-Mandate you can find a list of all existing SEPA mandates. A new Mandate can be added by clicking on "Add new record".

# SEPA Mandate

Manu	au	ε.

Save

Company	test corp	-
Client	John Doe inc. :: John Doe (johndoe, C1)	-
Mandate Reference	k12345-1	
Signature Date	2016-02-06 (yyyy-mm-dd)	
Туру	SEPA CORE Direct Debit	-
Type of Payment	recurring	-
Signed		
Active		

Company: Select the company that shall receive the payments.

Client: The client that shall be charged.

Cancel

**Mandate Reference:** The Mandate Reference is a unique number or list of chars that is used to identify this Mandate. You can freely set this Reference or e.g. use the client number of this client. The Mandate Reference will be used in all SEPA transactions to identify the Mandate.

Signature Date: The date when the Mandate was signed.

**Type:** The SEPA Debit type that this Mandate is valid for.

**Type of Payment:** Here you can select if the mandate is a one-time or recurring payment.

**Signed:** This option has to be set as soon as you received the signed Mandate back from your client. This option will also disable the Mandate reminder for this client.

Active: Here you can deactivate a Mandate.

# 9.2 SEPA XML-Export

This menu option is used to create SEPA exports in XML format. These XML files can be used by your ban to import the SEPA debit transactions. These files can also be imported into online banking programs like Starmoney Business or Sfirm. The SEPA exports get created automatically when you add an SEPA invoice with the invoice editor or when you do a

## recurring invoice run.

Company	Date of Export	Туре	Payment Type	Submitted	15 💌
				*	T
test corp	2016-02-28	SEPA CORE Direct Debit		۵	2 오
				× • •	· · · · · ·

Click on the Spreadsheet icon in the list to download the SEPA XML file.

The SEPA XML export can be edited by clicking on the item in the list. The fields are already populated. Here you can exclude invoices from being debited by unchecking the checkbox in front of the invoice record.

# SEPA XML Export

Company	test corp	
Invoice Date	2016-02-05	-
Туре	SEPA CORE Direct Debit	-
Payment Type		-
Name of the Export	test corp :: 2016-02-05 :: :: SEPA CORE	
Invoices		166.60
Submitted to bank?	0	

Company: The company that created the invoices.

Invoice Date: The creation date of the invoices.

Type: The SEPA type of the invoices that are included in this export.

Type of payment: The payment type can be first or recurring.

Name of the export: Every export has a unique name that is generated automatically.

Invoices: List of invoices that get charged by this export.

Submitted to bank: Here you can mark an export as submitted to your bank.

# **10 Advanced Options**

# **10.1 PayPal Connection**

PayPal provides a system for automatic notifications of incoming payments (IPN). The ISPConfig Billing Module provides an interface for these IPN notifications, so that open invoices will automatically be marked as *Paid* on receipt of a payment. The URL for this file is *http://yourserver.tld:8080/billing/payments/paypal/ipn.php*. However, there is one restriction, PayPal sends IPNs only to end points that use port *80* or *443*, but not port *8080*, which is used by ISPConfig.

There are two solutions for this:

**a)** If you run the ISPConfig control panel interface on a dedicated server on port 80 or 443, then you can specify the URL of the *ipn.php* page directly under Global Settings in the field *PayPal* notify URL (*IPN*). For port 80 this is:

http://www.yourdomain.com/billing/payments/paypal/ipn.php

or for port 443:

https://www.yourdomain.com/billing/payments/paypal/ipn.php

The domain www.yourdomain.com must be replaced by the domain that you use to access ISPConfig. This configuration option will come into consideration mainly for large multi-server installations.

**b)** In the second variant a so-called proxy script is used to redirect incoming IPN requests from a normal website to your ISPConfig installation.

## **Example:**

You operate a website under the URL <a href="http://www.yourdomain.com">http://www.yourdomain.com</a>. The ISPConfig control panel is only accessible via <a href="http://www.yourdomain.com">www.yourdomain.com</a>. Now put the following proxy script in the root directory of your website so that it can be accessed via the URL <a href="http://www.yourdomain.com/ipnproxy.php">http://www.yourdomain.com/ipnproxy.php</a>:

```
<?php
$url = 'http://www.yourdomain.com:8080/billing/payments/paypal/ipn.php';
$fields = $ POST;
if (count ( $fields )> 0) {
//url-ify the data for the POST
foreach ( $fields as $key => $value ) {
$fields_string .= $key . '=' . $value . '&';
}
rtrim ( $fields_string, '&' );
//open connection
$ch = curl_init ();
//set the url, number of POST vars, POST data
curl_setopt ( $ch, CURLOPT_URL, $url );
curl_setopt ( $ch, CURLOPT_POST, count ( $fields ) );
curl_setopt ( $ch, CURLOPT_POSTFIELDS, $fields_string );
// Uncomment the following option if you use a self signed ssl certificate
// curl_setopt($ch, CURLOPT_SSL_VERIFYPEER, false);
//execute post
$result = curl exec ( $ch );
//close connection
curl_close ( $ch );
}
?>
```

Please change the domain www.yourdomain.com in the script so that it matches your domain. On the server where this script is installed, the PHP cURL extension must be installed. On Debian and Ubuntu it can be installed with the command:

apt-get install php5-curl

Then log into ISPConfig and fill in the URL of this script in the field PayPal Notify URL (IPN) under Settings > Global Settings, e.g. http://www.yourdomain.com/ipnproxy.php.

## And this is how it works:

If a payment is made through PayPal, the ISPConfig Billing Module passes the URL http://www.yourdomain.com/ipnproxy.php on to PayPal as the IPN end point. For all events
that relate to this payment, PayPal will then contact the script
http://www.yourdomain.com/ipnproxy.php which forwards the request directly to the
ISPConfig IPN script at the URL

http://www.yourdomain.com:8080/billing/payments/paypal/ipn.php.

# **10.2 Dashboard Plugins**

The ISPConfig Billing Module provides 3 dashboard plugins which can be activated on the client dashboard. The dashlets can be activated under System > Interface > Main config.

## Rechnungen

The ISPConfig Billing Module integrates the invoices of a client in the ISPConfig Dashboard.

Welcome John Doe



#### Invoices

Invoice No.	Date	Amount	Status	
IV20110007 (Invoice)	2016-02- 28	14.76 EUR	Unpaid [pay now]	Z
RF20110002 (Refund)	2016-02- 05	-166.60 EUR	Not refunded	
IV20110006 (Invoice)	2016-02- 05		Unpaid [pay now]	Z

#### Website Harddisk Quota

Domain / Website	Used space	Soft limit	Hard limit
test.int	80 KB	unlimited	unlimited

#### Mailbox Quota

Email Address	Name	Used Space	Quota			
No email accounts found.						

Through the dashboard plugin the invoices can be downloaded as a PDF. When using the automatic payment feature, the payment page can be accessed directly from the dashboard.

## My Data

The client can view and alter his address details with the My data dashlet.

## My Data

Company name	John Doe inc.
Contact name	John Doe
Street	Mainstreet 12
ZIP	12345
City	Mycity
	[Edit]

## The "Edit" link opens the user detail form.

### My Data

Company name	John Doe inc.	
Title		
Contact name*	John Doe	
Customer No.	C1	
Street	Mainstreet 12	
ZIP	12345	
City	Mycity	
State		
Country	United States	-
Telephone		
Mobile		
Fax		
Email	john@john-doe-inc.tld	
Internet	http://	
ICQ		
VAT ID		
Company/Entrepreneur ID		
Bank account owner		
Bank account no.		
Bank code		
Bank name		
IBAN		
BIC / Swift		
PayPal Email		

## My Products

The dashlet "My products" shows the active products of the client. A product that is listed here can be found in the list of the recurring items in the billing module.

# **My Products**

Name	Price	Next Invoice	
john-doe- inc.tld	7.38 EUR	2016-02-05	[Edit]

A click on the Edit link opens the detail view which allows product up- and downgrades and ordering of addons and the cancellation of products.

# Product

Product Details Up-/Dov	vngrade Addons Cancellation
ltem (name)	john-doe-inc.tld
Quantity	1
Price	6.20 EUR
One-time Setup Fee	0.00 EUR
VAT	19.00 %
Recurs every	12 months
Туре	domain
Next payment	2016-02-05
Start date	2016-02-05

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