

The guide to Consolidated Billing

The new Consolidated Billing feature is designed to help partners streamline their billing with their customers. It will remove the need for partners to bill customers each month and spend time on payment collection, effectively eliminating a mundane and time consuming task from their day-to-day.

This feature enables partners to set their own subscription fees, invoice customers using their brand and receive funds directly into their bank accounts. Partners will also receive one single invoice from Business Catalyst each month for all of their sites.

Key Features

- Receive one consolidated bill for all your sites
- Ability to set your own subscription fees
- Ability to invoice customers using your brand
- Ability to receive fees directly into your bank account
- Ability for prospects to use your 30-day trial to create, upgrade and pay for sites
- Have the system automatically disable sites to assist in payment collection

Prerequisites

There are a number of prerequisites that partners must meet to in order to use this feature.

- You must be a rebranding partner
- You must have a valid credit card on file so we can automatically charge you for your sites
- You must have an account with one of the following recurring payment gateways: Authorize.net (US), PayPal Website Pro (Global) or eWay (Australia)
- Your merchant account must accept payments using Visa, MasterCard and Amex

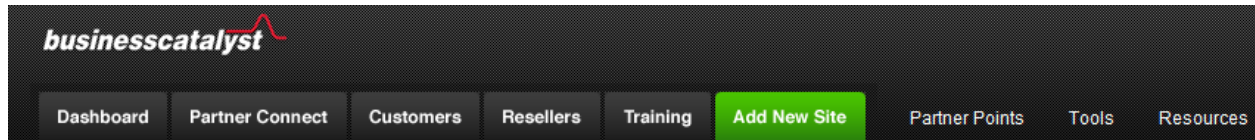
How does it work

Every Business Catalyst partner has access to the Partner Portal, but also every partner has a single free site for the operation of their own website. This free site is a critical component of the Consolidated Billing feature. When you opt for this feature, Business Catalyst will use your free site as the eCommerce engine for the sale of sites to your customers. Your free partner site will also handle all invoicing and payment collection using existing functionality in your site.

In fact this is how Business Catalyst has operated its business to date. We invoice and collect payments from customers via the same functionality that partners have in their free site. With this new feature we are effectively allowing partners to operate a similar business like we have for many years.

Setting up Prices / Plans

When you enable the Consolidated Billing feature we will automatically create a number of products in your free site. You can find these in eCommerce->Products. You will see two products for every plan that Business Catalyst offers. The first product represents the plan for monthly sales, and the other for yearly sales. It's up to you whether you want to allow customers to buy a plan on a yearly basis however plans must be offered on a monthly basis.



Consolidated Billing

Full Solutions

Mini (1-User)	Monthly Fee	All-in-One Full Solution ▼	Setup Fee	-- Don't Offer -- ▼
	Annual Fee	All-in-One Full Solution ▼	Setup Fee	-- Don't Offer -- ▼
Regular (5-User)	Monthly Fee	All-in-One Full Solution ▼	Setup Fee	-- Don't Offer -- ▼
	Annual Fee	All-in-One Full Solution ▼	Setup Fee	-- Don't Offer -- ▼
Super (10-User)	Monthly Fee	All-in-One Full Solution ▼	Setup Fee	-- Don't Offer -- ▼
	Annual Fee	All-in-One Full Solution ▼	Setup Fee	-- Don't Offer -- ▼

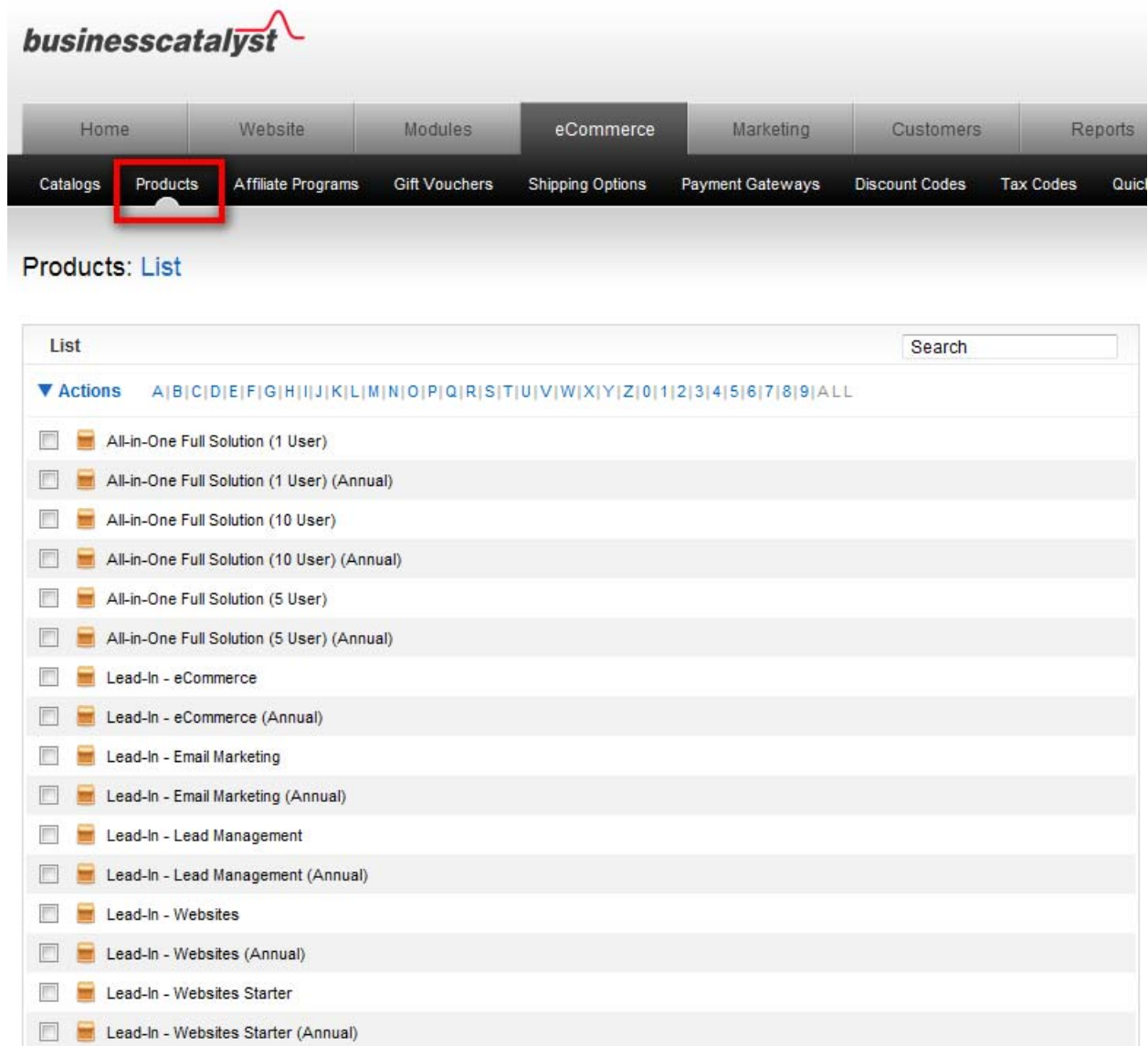
Lead-In's

Websites	Monthly Fee	Lead-In - Websites ▼	Setup Fee	-- Don't Offer -- ▼
	Annual Fee	Lead-In - Websites (Ani) ▼	Setup Fee	-- Don't Offer -- ▼
Websites Starter	Monthly Fee	Lead-In - Websites Star ▼	Setup Fee	-- Don't Offer -- ▼
	Annual Fee	Lead-In - Websites Star ▼	Setup Fee	-- Don't Offer -- ▼
Email Marketing	Monthly Fee	-- Don't Offer -- ▼	Setup Fee	-- Don't Offer -- ▼
	Annual Fee	-- Don't Offer -- ▼	Setup Fee	-- Don't Offer -- ▼
eCommerce	Monthly Fee	Lead-In - eCommerce ▼	Setup Fee	-- Don't Offer -- ▼
	Annual Fee	Lead-In - eCommerce (▼	Setup Fee	-- Don't Offer -- ▼
Lead Management	Monthly Fee	-- Don't Offer -- ▼	Setup Fee	-- Don't Offer -- ▼
	Annual Fee	-- Don't Offer -- ▼	Setup Fee	-- Don't Offer -- ▼

You can also choose which plans you wish to offer for sale to your customers (to see a list of plans please download the latest partner pricing via your Partner Portal->Resources area). For example the full solution is generally offered in a 1, 5 and 10 user configuration. You can choose to offer just the 1 and 5

user plans and not the 10. However you cannot vary the limits on these plans, e.g. you cannot offer a 20-user plan. To configure the list of plans offered please go to Partner Portal->Consolidated Billing section.

When we initialize the list of products in your site, we will automatically assign the default prices for each plan in the currency that we currently charge you, i.e. US or Australian dollars. However if the payment gateway that you have selected (see list of supported gateways above) allows you to process payments in a different currency, e.g. GBP then you can sell plans to your customers in that currency. To take advantage of this feature and sell plans in a different currency please go to eCommerce->Products and assign the relevant price to each plan for the relevant country/currency. You must also ensure that the default URL of your free partner site (Admin->Manage Domains) is set to the same country. It's important to note that when you receive your consolidated bill at the beginning of each month, Business Catalyst will charge you in either US\$ or AU\$ depending on the existing relationship we have with you.



The screenshot shows the Business Catalyst Partner Portal interface. At the top, the 'businesscatalyst' logo is visible. Below it is a navigation menu with tabs for Home, Website, Modules, eCommerce, Marketing, Customers, and Reports. Under the eCommerce tab, there is a sub-menu with 'Products' highlighted by a red box. Below the navigation, the page title is 'Products: List'. The main content area shows a list of products with a search bar and a filter menu. The filter menu includes 'Actions' and a list of letters from A to Z, along with numbers 0-9 and 'ALL'. The product list contains 18 items, each with a checkbox and a folder icon, representing various 'All-in-One Full Solution' and 'Lead-In' plans for different user counts and durations.

Product Name
All-in-One Full Solution (1 User)
All-in-One Full Solution (1 User) (Annual)
All-in-One Full Solution (10 User)
All-in-One Full Solution (10 User) (Annual)
All-in-One Full Solution (5 User)
All-in-One Full Solution (5 User) (Annual)
Lead-In - eCommerce
Lead-In - eCommerce (Annual)
Lead-In - Email Marketing
Lead-In - Email Marketing (Annual)
Lead-In - Lead Management
Lead-In - Lead Management (Annual)
Lead-In - Websites
Lead-In - Websites (Annual)
Lead-In - Websites Starter
Lead-In - Websites Starter (Annual)

One of the other benefits of the Consolidated Billing is that now you can also choose to charge customers a setup fee for new sites. For example when a customer signs up for a 1-user plan you can essentially charge them:

- US\$49 setup charge
- US\$49 monthly recurring charge

When Business Catalyst charges you for the 1-user plan:

- We won't charge you a setup fee since Business Catalyst does not have a setup fee on any of its plans. You effectively make US\$49 profit.
- We will charge you US\$39 for the 1-user plan. You effectively make \$10 extra profit. You also earn 20% commission on the US\$39/month which is redeemed through the existing process

The screenshot shows the Business Catalyst interface. At the top is the logo 'businesscatalyst' with a red line graph. Below it is a navigation menu with tabs: Home, Website, Modules, eCommerce, Marketing, Customers, and Reports. Under the 'eCommerce' tab, there are sub-tabs: Catalogs, Products, Affiliate Programs, Gift Vouchers, Shipping Options, Payment Gateways, Discount Codes, Tax Codes, and Quick Links. The main content area is titled 'Products: All-in-One Full Solution (1 User)'. Below this is a form titled 'Country Price for Product'. The form has a left sidebar with a scrollable list of countries, where 'US' is selected. To the right of the list are several input fields: 'Country' (dropdown menu showing 'UNITED STATES'), 'Set Pricing for your target audience' (dropdown menu showing 'Consumers'), 'Recommended Retail Price' (text input field with '0.00'), 'Sell Price' (text input field with '39.00'), 'Enable Volume Discount' (checkbox, currently unchecked), and 'Tax Code' (dropdown menu showing 'Not Applicable'). At the bottom of the form are four buttons: 'Save Price' (with a save icon), 'Delete Price' (with a delete icon), 'Back' (with a left arrow icon), and 'Next' (with a right arrow icon).

Setting up your public facing website

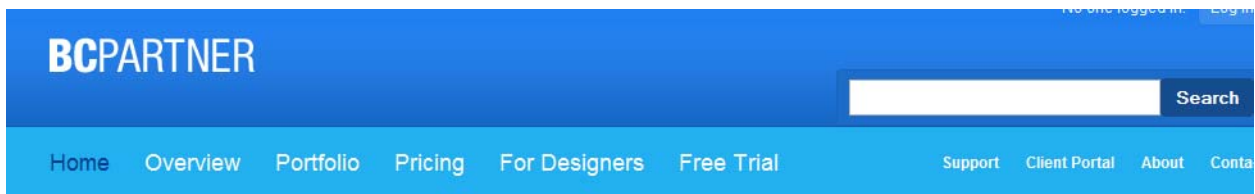
One of the decisions you need to make is which plans do you want to offer to your prospects via your website. Business Catalyst plans are made up of the full solution and a number of lead-in plans. Lead-in plans are effectively a subset of the system which provide prospects an easy upgrade path to the full solution.

- Full Solution (All-in-One)
- Lead-in: Websites
- Lead-in: Websites Starter
- Lead-in: Email Marketing
- Lead-in: Lead Management
- Lead-in: eCommerce

Partners are encouraged to offer the Full Solution plan only. By doing this you simplify your website and ensure it clearly articulates what you are selling. It will provide customers with a single option to sign up for a free trial of an online business with your company. From there, free trial customers have the opportunity to automatically upgrade and pay you directly for their sites.

To begin the setup of your public facing website you must first retrieve the URL for your Online Business Builder. You can find this in your Partner Portal->Resources section. It will be in the format of:

<http://yourdomain.com/Signup/OBB.aspx?SPID=XYZ>.



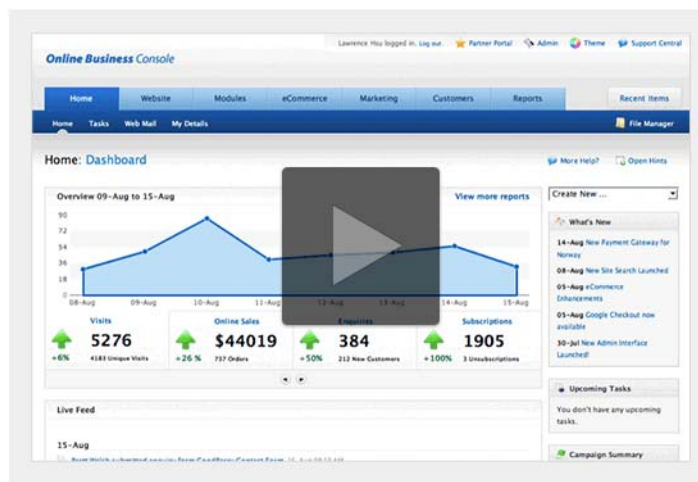
Websites are dead.

It's time for an Online Business. Our hosted and easy-to-use system is designed to meet your specific business needs - allowing you to focus on your goals, not mastering the technology behind it.

Take a Free 30-Day Trial

Now Working with BigCompany! 01-Jun-2009
Recently we pitched BigCompany to become their premier online service provider - and today we heard ..

Welcome to Our New Website! 15-May-2009
Our brand new site has a bunch of exciting new features, including: A Portfolio for you to brow..



When a prospect uses that URL to sign up, they'll automatically receive a full solution site. When they choose to upgrade this site they'll be presented with the various flavors of the full solution, e.g. 1, 5 or 10-user (see above on setting up your prices and plans).



If you however wish to offer customers one or more of the lead-in plans, then you will need to alter the Online Business Builder URL so sites are created based on the correct Lead-in plan at the time of creation. When such a site is upgraded, the only option available is to simply pay for it, i.e. lead-in plans do not come in different flavors and there is no opportunity to upgrade a trial lead-in plan to a full solution or to a different lead-in plan.

To enable the creation of lead-in plans simply append the following to your Online Business Builder URL and link to it from your public facing website.

Lead-in: Websites URL

<http://yourdomain.com/Signup/OBB.aspx?SPID=XYZ&STID=400>

Lead-in: Websites Starter URL

<http://yourdomain.com/Signup/OBB.aspx?SPID=XYZ&STID=410>

Lead-in: Email Marketing URL

<http://yourdomain.com/Signup/OBB.aspx?SPID=XYZ&STID=100>

Lead-in: Lead Management URL

<http://yourdomain.com/Signup/OBB.aspx?SPID=XYZ&STID=200>

Lead-in: eCommerce URL

<http://yourdomain.com/Signup/OBB.aspx?SPID=XYZ&STID=300>

Full Solution URL

<http://yourdomain.com/Signup/OBB.aspx?SPID=XYZ>

CRM / Invoicing / Payment Collection

As prospects sign up for new trial sites we will automatically add them to the Customer section of your free partner site. And when sites are upgraded, the system will automatically create an order for the relevant customer in your free partner site.

You can at any time also view the list of invoices generated for a site via your Partner Portal->Customers section. Simply choose a site to see its billing history.

Cancelling a paid customer site

If a customer contacts you to cancel a subscription you will need to:

- Login to your free partner site
- Go to Customers section and locate this customer
- Go to the Orders section
- Disable recurrence on any recurring invoice
- You may also delete any future dated unpaid invoices
- You will need to contact Business Catalyst so we can cancel this site for you. We will shortly add the ability so partners can cancel sites on Consolidated Billing directly from their Partner Portal.

The screenshot shows the 'Order Details' page with the following fields:

- Recurring Status:** Enabled (highlighted with a red box)
- Cycle Type:** Monthly
- Next Invoice Date:** 01-Oct-2009
- End of Recurrence:** 31-Oct-2020
- Direct Debit:** Credit Card
- Direct Debit Days:** 0
- Card Type:** Visa
- Name on Card:** Clive Owens
- Card Number:** 4506*****3432
- Expiry Date:** 07 / 2010
- CCV:** (empty)
- Process Now** button

A red box at the bottom left contains the text: "Disable to stop new orders being created". A red arrow points from this box to the 'Recurring Status' dropdown menu.

Understanding billing frequency

It's important that you understand how recurring invoices work and what timing is used for their generation and payment collection.

- Site upgraded today will generate a new invoice with today's date as the invoice date
- Recurring orders will always recur 14-days before the next invoice date (see recurrence tab), i.e. an order with a monthly recurrence that has an invoice date of 1-Sep, will recur on 16-Sep. A new invoice is created with an invoice date of 1-Oct. This is emailed to your customer so they

have an opportunity to review it (you can contact Business Catalyst so we disable recurring invoices being emailed to customer. This can lead to higher retention rates).

- The new invoice will automatically be charged on 1-Oct (see recurrence tab->Direct Debit days). If payment cannot be processed, you will receive an email, however the system will not reprocess the payment again. You can go to the recurrence tab of any order and try and reprocess it.

Suspending customer sites

The system will automatically disable the Administration area of the website if an invoice is not paid within 7-days of the Invoice Date. When the Administration area is disabled, customers who login will be presented with a list of outstanding invoices and the ability to make payment. A successful payment will automatically re-enable the site. Customers can also choose to use the entered credit card details for any future invoices.

If payment cannot be collected after 4-weeks, then the entire site is disabled. This includes the actual site content, any email accounts and the Administration area. It's important to note that recurring invoices will continue to recur and it's up to you to manually stop them. Business Catalyst will also continue to charge you regardless of whether the site is disabled or not. It's imperative that you notify Business Catalyst to cancel a site as we do not provide refunds.

Updating credit card details

If a customer contacts you to update their credit card details, then you will need to login to your free partner site and retrieve this customer's record via the Customers section. You will then need to add the new credit card details to any 1) recurring invoices, 2) unpaid invoices. Please note that you need to use your secure URL (https://) to add/update credit card details. You can locate your secure URL via Admin->Manage Domains.

The screenshot shows the 'Order Details' page with several tabs: Details, Payments, Commissions, Recurrence/Direct Debit (selected), Related Files, Workflows, Misc, and Tasks. The 'Recurrence/Direct Debit' section contains the following fields:

- Recurring Status: Enabled
- Cycle Type: Monthly
- Next Invoice Date: 01-Oct-2009
- End Reoccurrence: 31-Oct-2020
- Direct Debit: Credit Card
- Direct Debit Days: 0
- Card Type: Visa
- Name on Card: Clive Owens
- Card Number: 4506*****3432
- Expiry Date: 07 / 2010
- CCV: [empty]
- Process Now button

A red box highlights the credit card details section, and a red arrow points from a text box to it. The text box contains the following instructions:

Update and save order.
If you wish to also charge card, click "Process Now" then save order.

Testing

If you are going to offer 30-day trials on your website and allow customers to automatically upgrade and pay for those, then it's important that you fully test the entire process.

Here's a summary of the steps for setting up and testing:

- Get an account with a supported payment gateway and add this to your free partner site
- Go to your Partner Portal and enable Consolidated Billing
- Provide valid credit card details so we can charge you each month for the sites you have on Consolidated Billing
- We will populate your free partner site with all the plans with default prices
- Login to your free partner site and update prices for any of your plans
- Using Partner Portal->Consolidated Billing choose which plans you wish to offer (we encourage partners to only offer the full solution)
- Add a link to your public facing website so prospects can easily signup and create 30-day trial sites
- You should create a trial site and login to it
- Click on the "Upgrade" button (top-right) to see the relevant prices displayed
- You can optionally go ahead and upgrade/pay for a site and then void the transaction via your payment gateway interface in order to have gone through the complete process, although this last step is not required.

Thing you should be aware of

- All existing sites that are not billed using Consolidated Billing will continue to be billed in the old manner. There are no plans to migrate existing sites to the new billing method in 2009.
- 30-Days notice is required for all site cancellations. No refunds will be issued.
- If a customer purchases a plan on a yearly basis, then Business Catalyst will charge you the yearly fee for that plan. However if a customer subsequently cancels the site and you provide a refund to them, we will not provide a refund to you.
- Excess charges for a site (e.g. sending excess newsletters) are currently not a part of this new feature. Customers will be billed for those as they have in the past

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