
Client Support & Management

HostBill

Single pane of glass

Benefit from a single pane of glass - unified interface to view and manage all of the services and customers. HostBill provides a centralized means of control with perfect visibility into your resources. Log in once and access all the tools you need to do your job.

Have the whole process streamlined to save time, minimize frustration and unify your organization.

Manage various services from a single dashboard

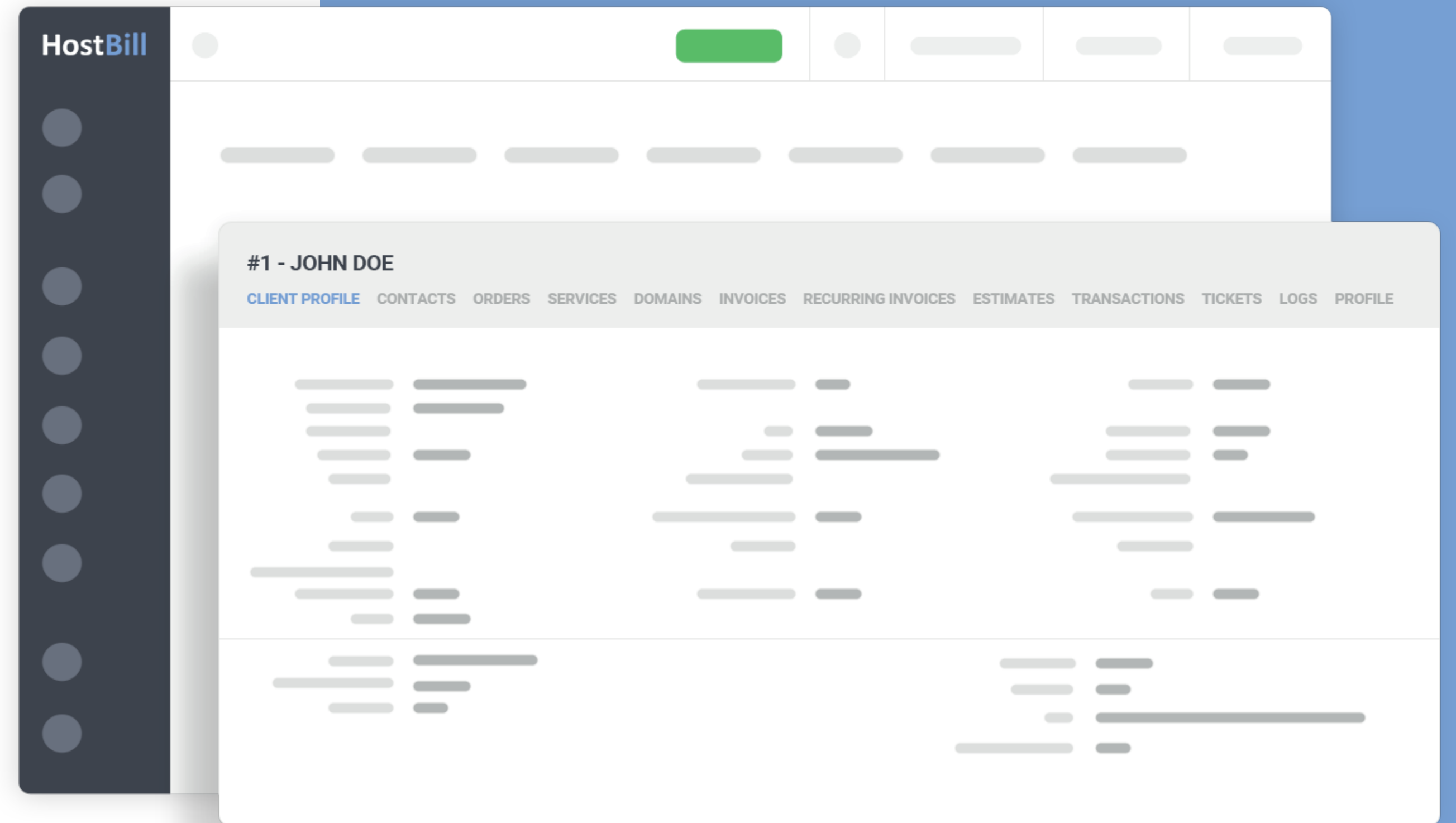
With HostBill you have the ability to manage the whole variety of your services and do all necessary work using one graphical user interface. The unified display on a single screen provides all the metrics and status information required to effectively manage the services. With unified management tools you have the visibility and governance over multiple services, ability to enforce security policies all at once and control the costs - with server/app cost and revenue feature you can set monthly costs of each server connected to HostBill and have the app revenue automatically calculated to easily check which server brings you most profit or loss.

The screenshot displays the HostBill dashboard interface. On the left is a dark sidebar with the 'HostBill' logo and a list of account statuses: ACTIVE (13), PENDING (12), SUSPENDED (0), TERMINATED (1), CANCELLED (2), and FRAUD (4). The main content area features a header with 'ORDERS & ACCOUNTS' and a table with the following columns: #, CLIENT NAME, DOMAIN, SERVICE, PRICE, BILLING, STATUS, and NEXT DUE. The table contains 8 rows of data.

#	CLIENT NAME	DOMAIN	SERVICE	PRICE	BILLING	STATUS	NEXT DUE
23			COLOCATION	\$ 20.00 USD		CANCELLED	
22			4GB CLOUD	\$ 200.00 USD		ACTIVE	
21			SSL CERTIFICATE	\$ 14.00 USD		ACTIVE	
20			PREMIUM HOSTING	\$ 190.00 USD		PENDING	
19			PREMIUM HOSTING	\$ 190.00 USD		CANCELLED	
18			COLOCATION	\$ 20.00 USD		ACTIVE	
17			4GB CLOUD	\$ 250.00 USD		PENDING	
16			COLOCATION	\$ 20.00 USD		ACTIVE	

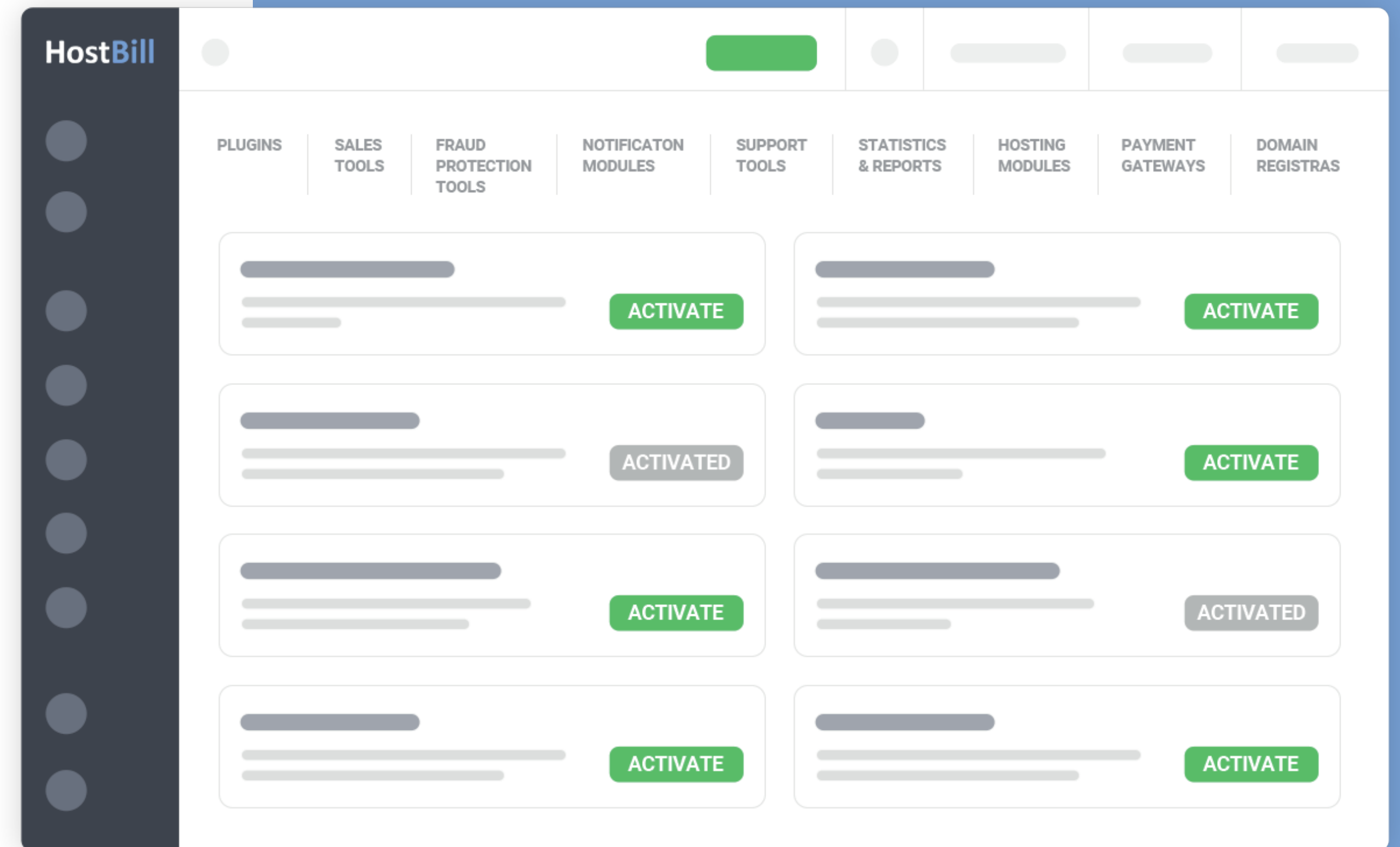
All client information in one place

Have all the necessary client data gathered from multiple applications into a single display. With centralized, service-centric view you can easily know what resources were being used, by whom, how and when. Have the full visibility across the entire business network including affiliates and client contacts, track all client actions thanks to HostBill system logs and quickly create and modify access control.



Independent software with comprehensive set of business tools

Multitude of integrations, plugins, tools and features make HostBill a truly comprehensive solution that has literally anything to get you up and running with your business. It's an all-in-one business software for managing clients, providing customer service and support, billing, invoicing and payment processing and managing services and resources - with many of the processes automated for your convenience.



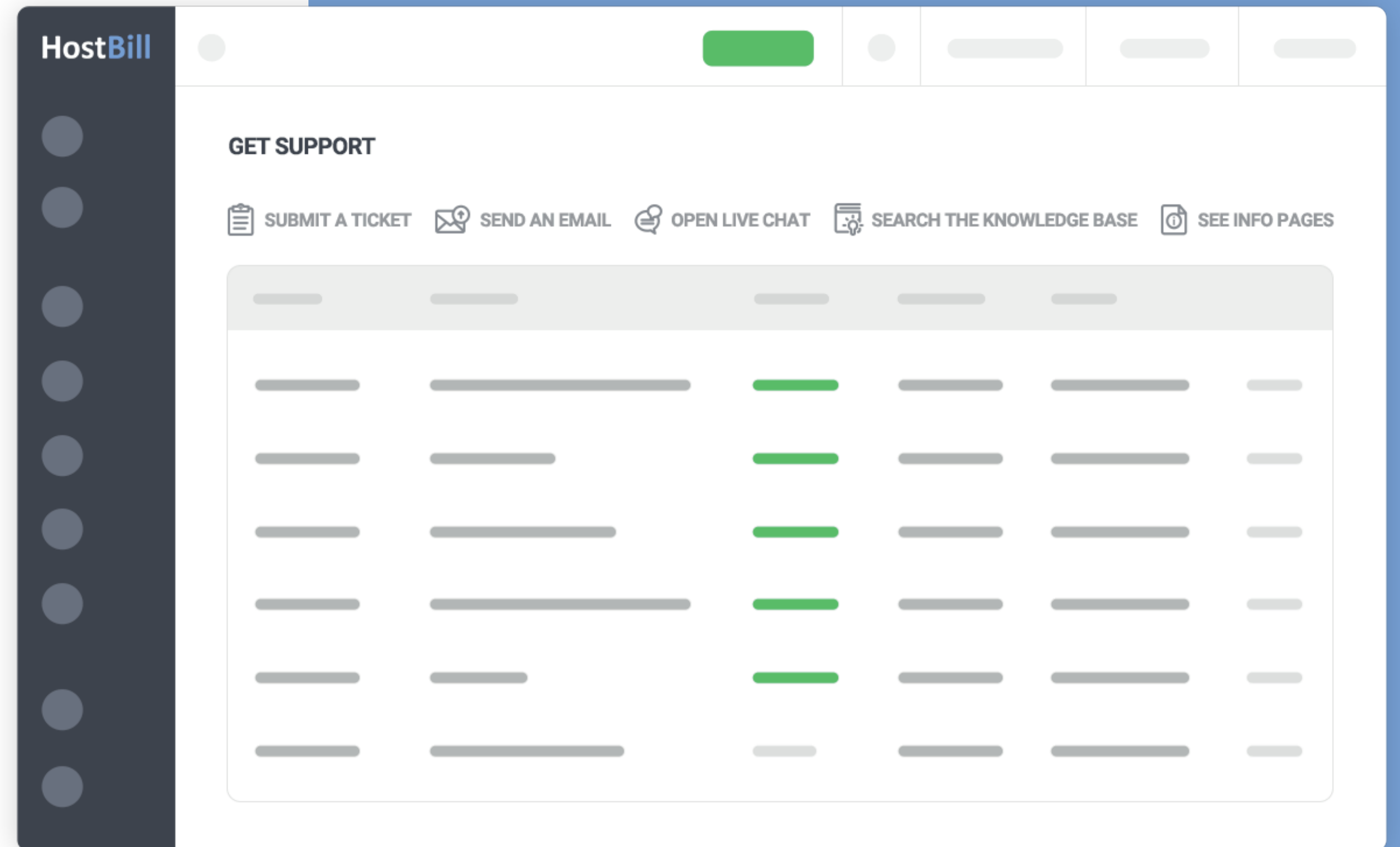
Multi channel support

Providing different methods of communication for your customers to reach you and answering all enquiries with the same level of professionalism and agility is what your customers expect from you. Multi-channel support - offering multiple ways of communications not only increases customer satisfaction and customer retention but also boosts your brand's image and credibility.

At HostBill we give you the opportunity to serve your clients in a variety of ways that are convenient and effective.

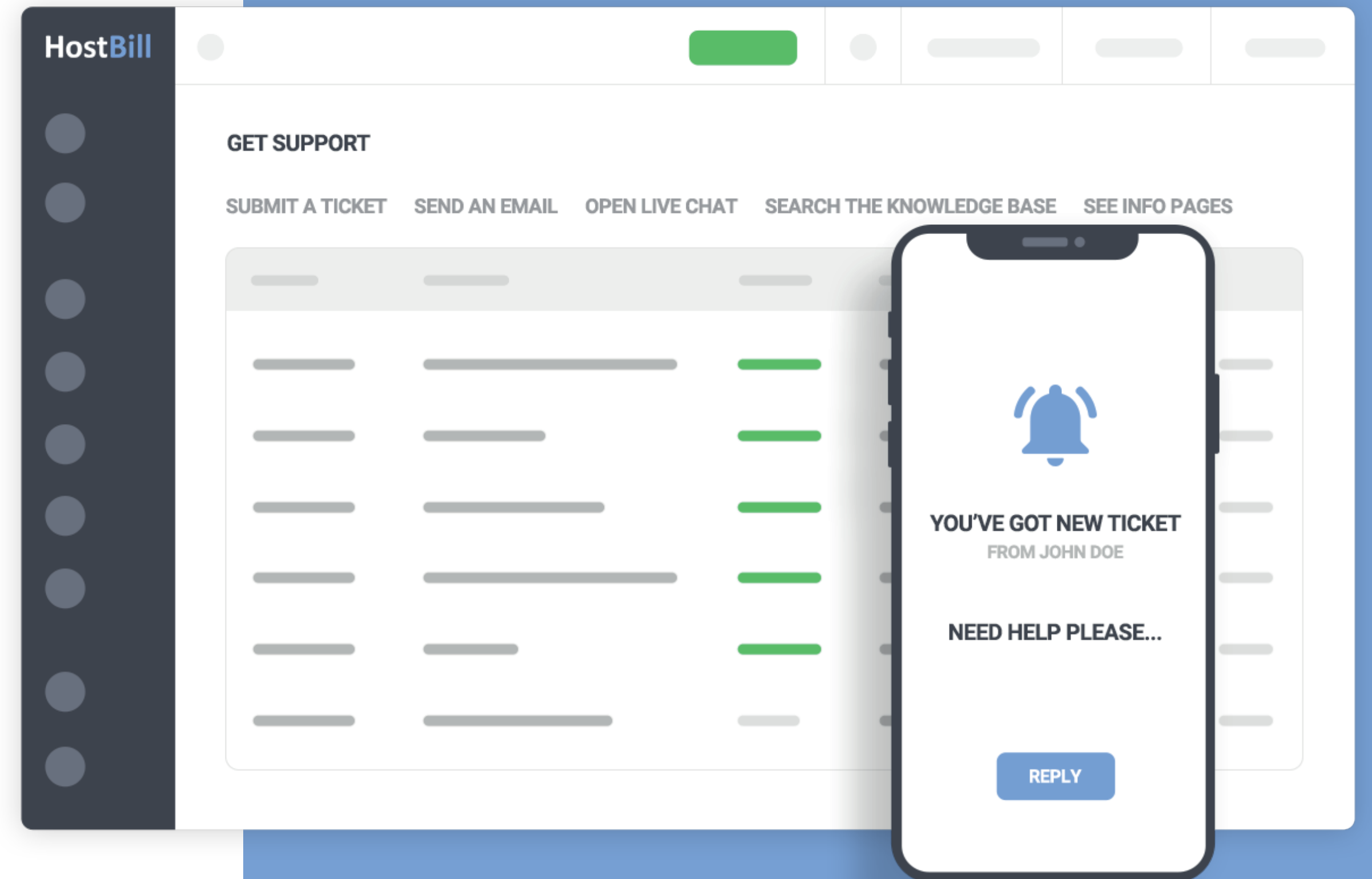
Variety of support channels

With HostBill you can provide your customers with support through our powerful ticketing system integrated with incoming and outgoing emails, use Live Chat to engage website visitors to communicate with you in real-time, so you can assist with purchases and provide live support or offer client self-service through articles in a knowledge-base or info pages. Basically, the idea is to be as customer-centric as possible giving every customer the chance to interact with your company in the channel they prefer.



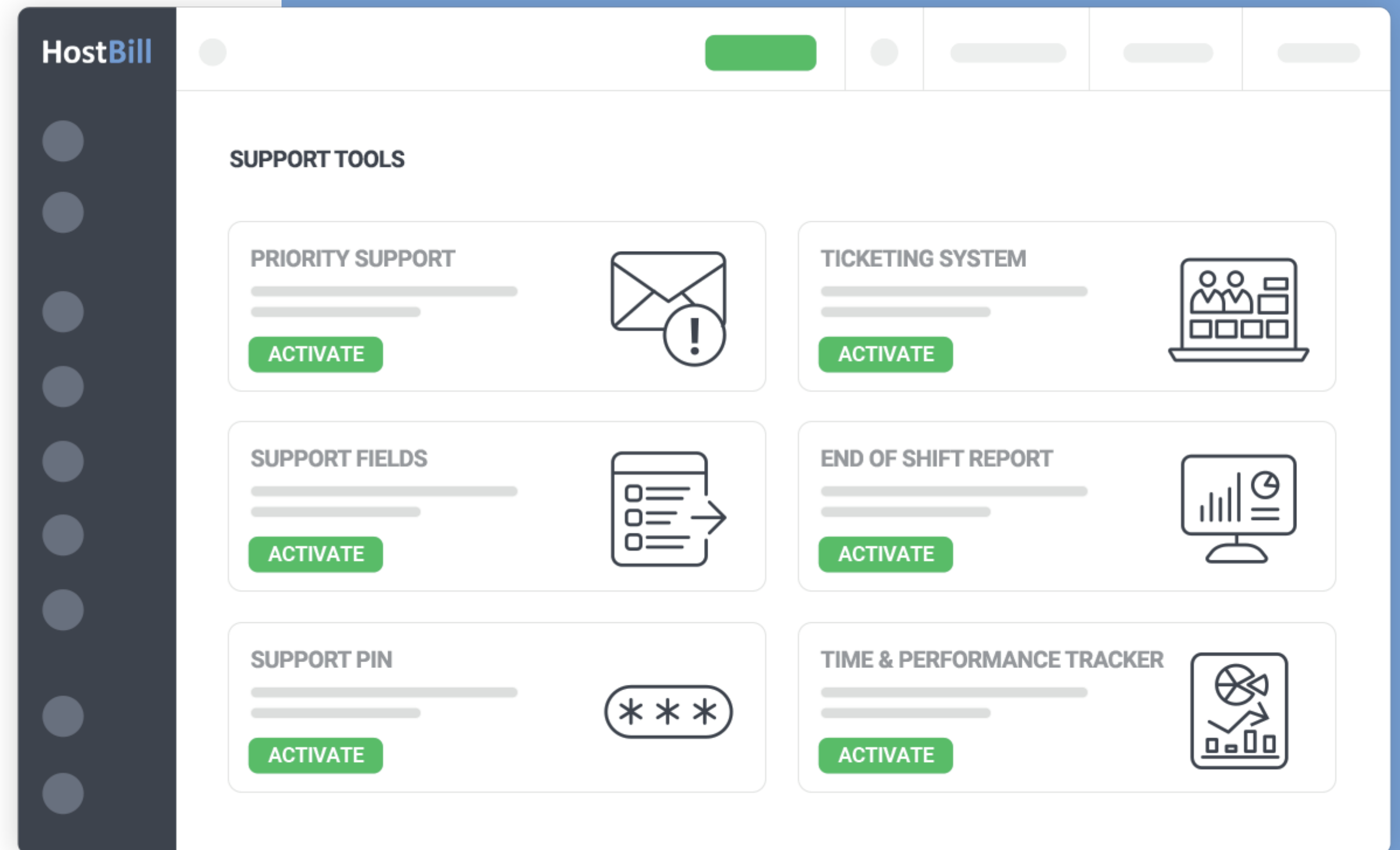
Cohesive and integrated support service

The challenge is not only to be accessible in multiple support channels, but also to deliver consistent and an integrated service quality through these channels. With HostBill customization features you can provide a unified brand experience so that customer can switch between multiple channels yet still experience quality of service. Having everything centralized in a single platform makes it easier for your team to work comfortably, and to deliver quick answers. No need to spend valuable time switching between channels to gather information - everything you need is right here in your HostBill admin area.



Multiple support tools

The extend core HostBill support functionalities we also offer a range of support plugins. Support PIN plugin simplifies the process of providing phone support, enabling easy client verification during phone support. Priority Support module allows you to sell priority support as recurring service in automated fashion. Support Fields plugin is an addition to HostBill Ticketing System that enables to organize and manage tickets more efficiently and to reduce spam messages. Using Support Fields you can create forms consisting of an unlimited number of fields that your customer needs to go through before submitting the ticket.



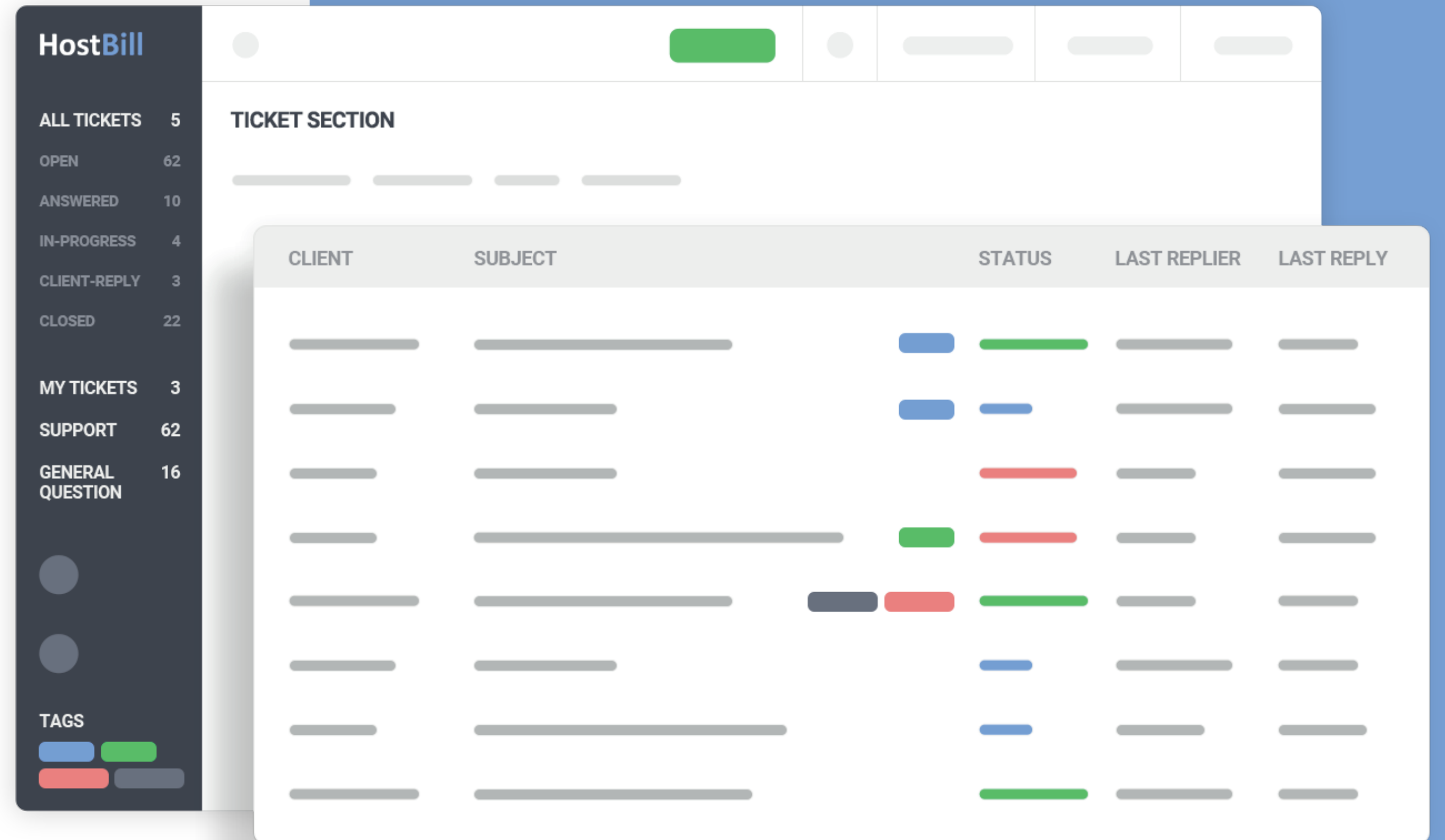
Powerful Ticketing System

Get your support team to be organized, focused, efficient and effective with HostBill flexible and automated helpdesk software. The Ticketing System UI integrates seamlessly into HostBill admin panel ensuring your staff members will have all customer tickets at their fingertips across all HostBill sections. Ticketing System can be used as a channel of communication with both registered and non-registered customers.

The multitude of ticket management features will help you to provide your clients with exceptional customer service while extensive notification system ensure quick response time.

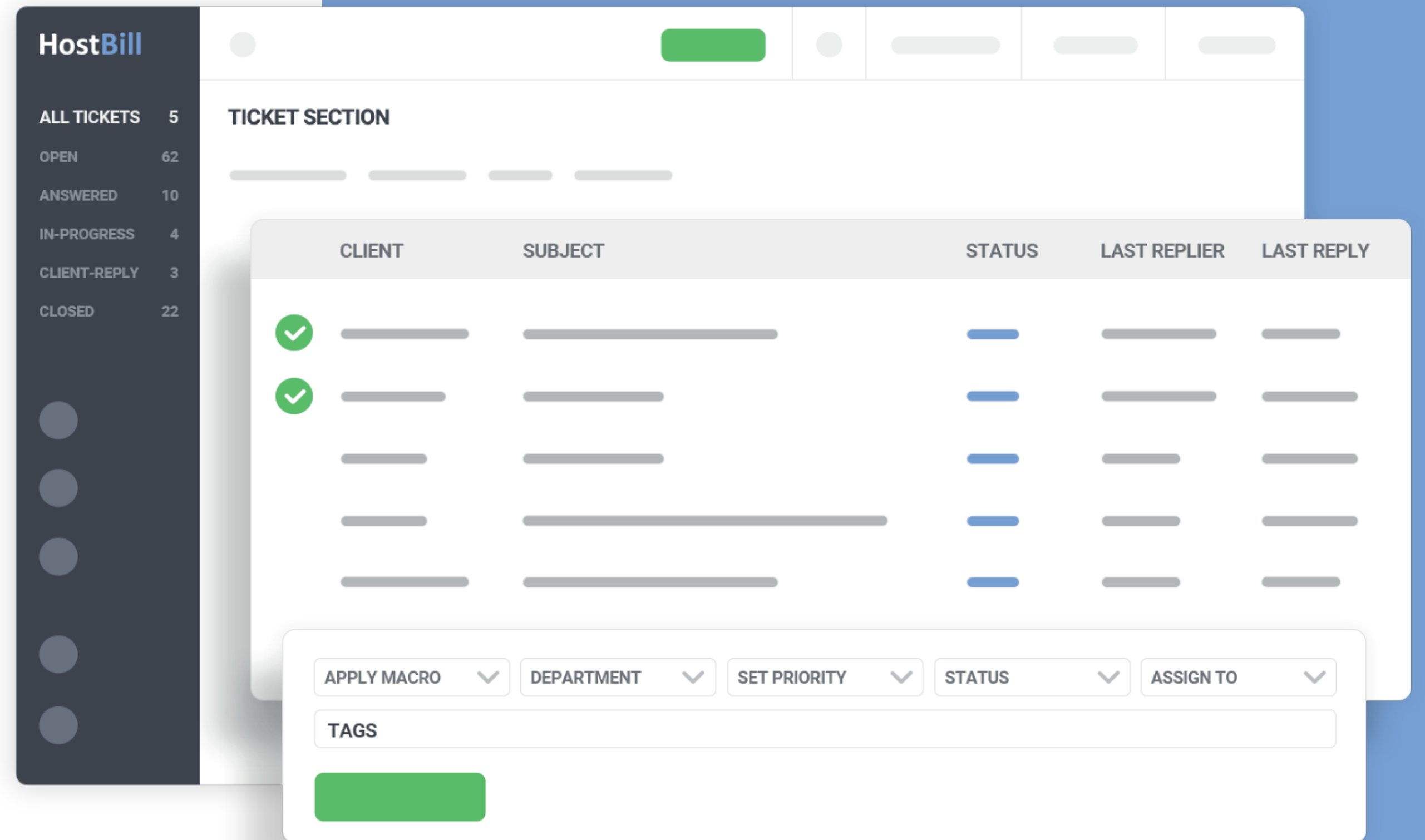
Organizing tickets

Everyone has different methods of work, therefore in HostBill Ticketing System each staff member can create their own custom ticket view to customize the workflow. All support tickets can be easily organised by tags, that enable filtering ticket listing by tag presence or lack of it. Staff members can also search tickets using HostBill smart search feature. Tickets can have different priority levels, assigned by staff or optionally by customer as well and different statuses, that can be customized to fit your industry. You can also create multiple incoming message filters and check support ticket elements for common patterns to teach your ticketing system which support messages to pass through, and which ones to reject.



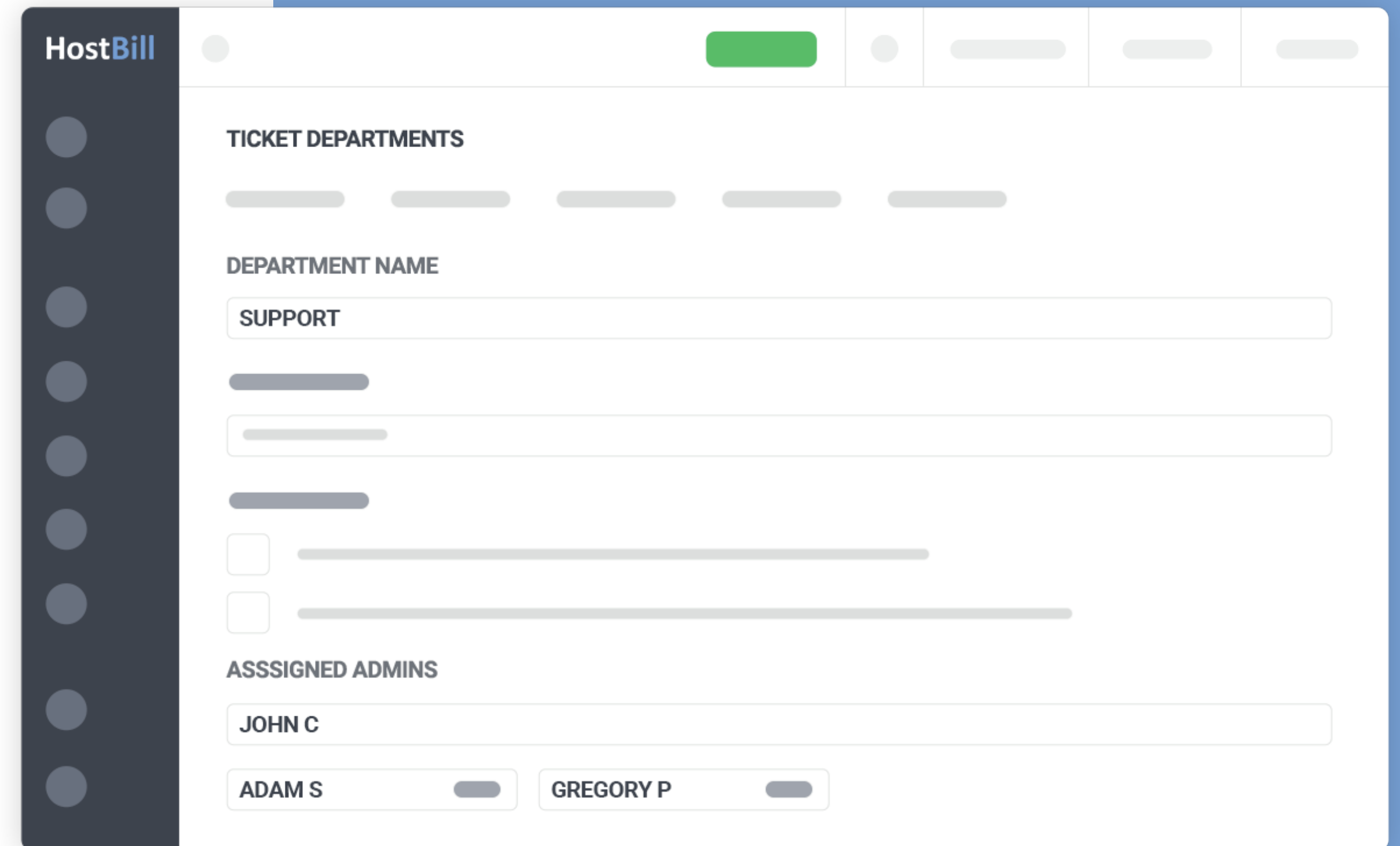
Ticket management

The Ticketing System allows to apply bulk actions to work on multiple similar tickets at once - just select few tickets and apply a macro to them - no need to go through every single ticket to escalate or update it! As certain replies are sent more than once - you can never repeat yourself again - with one click assign predefined reply to ticket, hit 'send' and you're ready for next tickets! Each predefined reply can be stored as macro - create reusable macros so later with one click you can change ticket status, priority, assignments, ticket tags, and share ticket. Each staff member can also have their own custom list of most commonly used macros. Support tickets can be automatically escalated to higher levels if not responded on time. Escalated tickets can then have automatically applied macros. You can also configure certain departments to auto-close support tickets if no actions has been taken.



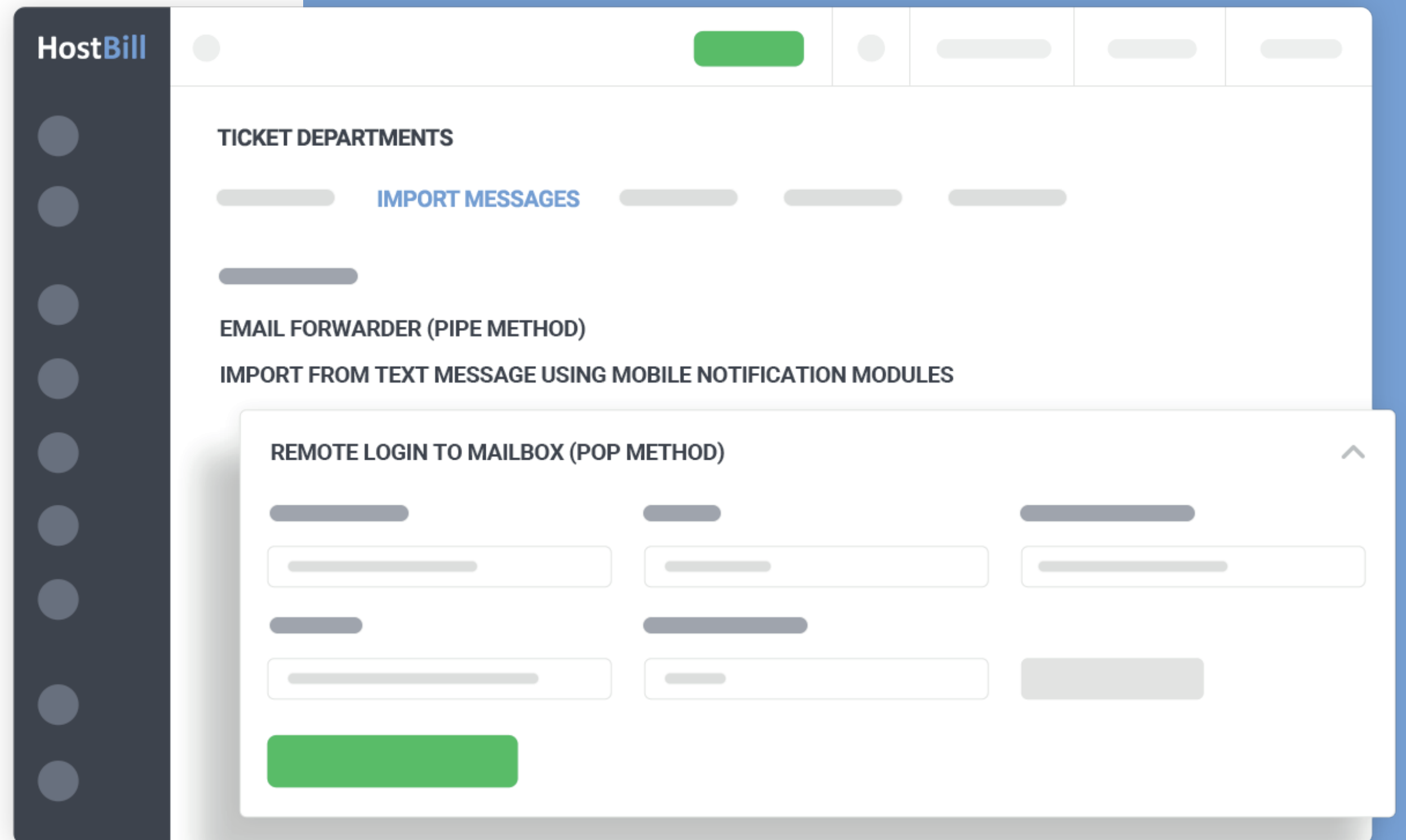
Ticket collaboration

To help you better organize your support team work, with HostBill Ticketing System you can create as many support departments as needed. Each staff member can be assigned to a single or multiple departments. Staff members can also be automatically assigned to work on a thread based on round-robin algorithm. Departments can be accessible through email and/or web-UI only. To improve communication, your staff members can communicate on each ticket thread individually using ticket notes - a mini chat for staff members to work together on ticket. HostBill provides live updates, so if one staff member is working on a certain ticket, all other team members will know about it. All actions taken on the ticket are logged - responses, status changes and more - to give the management ability to supervise ticket history at any given point.



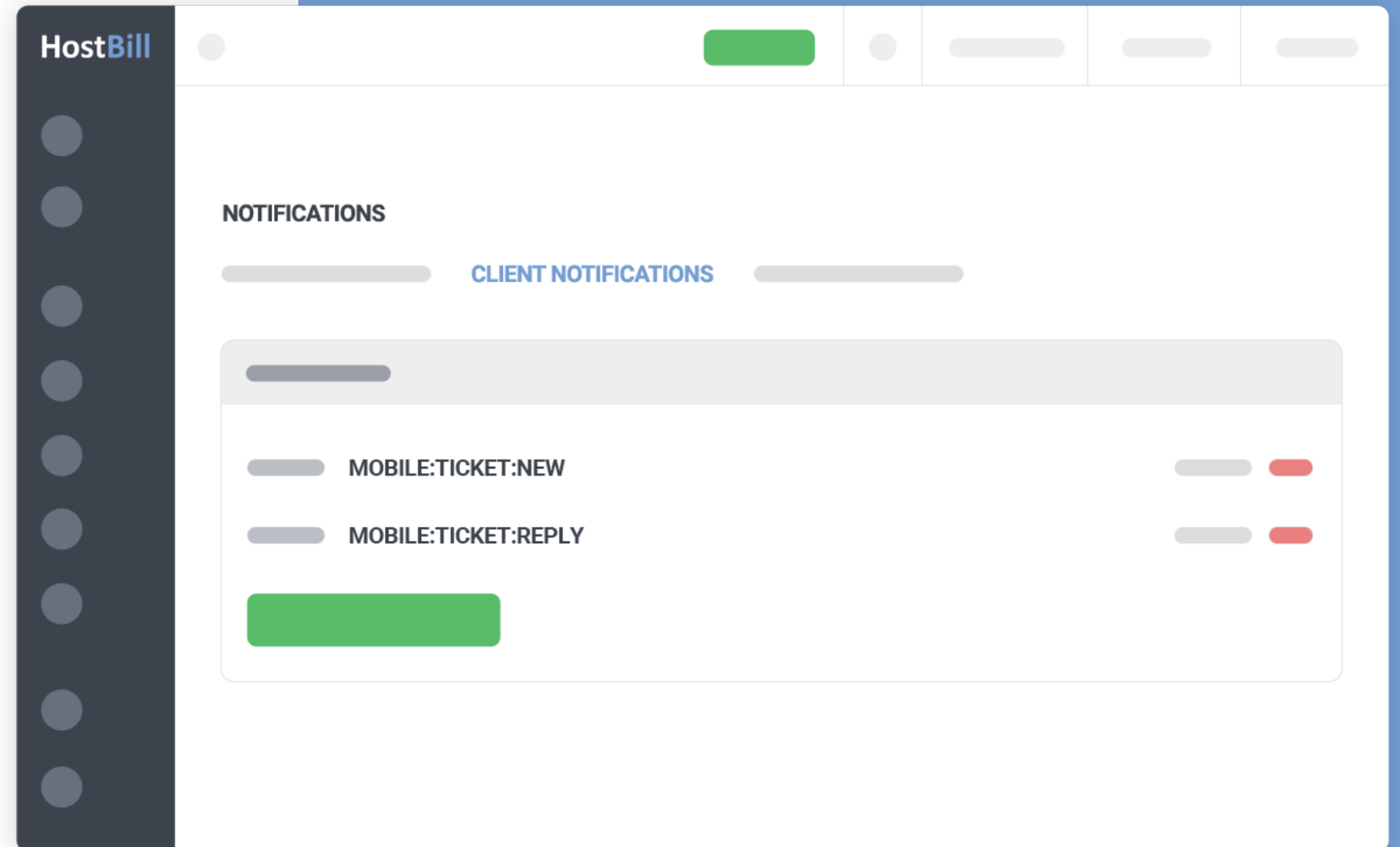
Importing tickets

New tickets can be created by both your customers or your staff inside the ticketing system. You can also enable email import directly from your inbox to fetch support emails and automatically turn them into tickets or ticket replies. Emails can be imported from multiple mailboxes using email forwarding or by allowing ticketing system to log-in to email to fetch messages. All messages imported from your support mailboxes are logged for your future reference. Imported messages turned into tickets can be automatically filtered and scanned to see if a certain ticket macro can be used or to apply predefined response, change ticket priority, status and more. The system also gives you the tool to learn what IP the customer sent the email from and what submission method was used as well as to edit ticket CC list. With our Ticketing System your staff have the opportunity to reply to support tickets virtually from anywhere: tickets can be replied to via email which will be then automatically imported into the system.



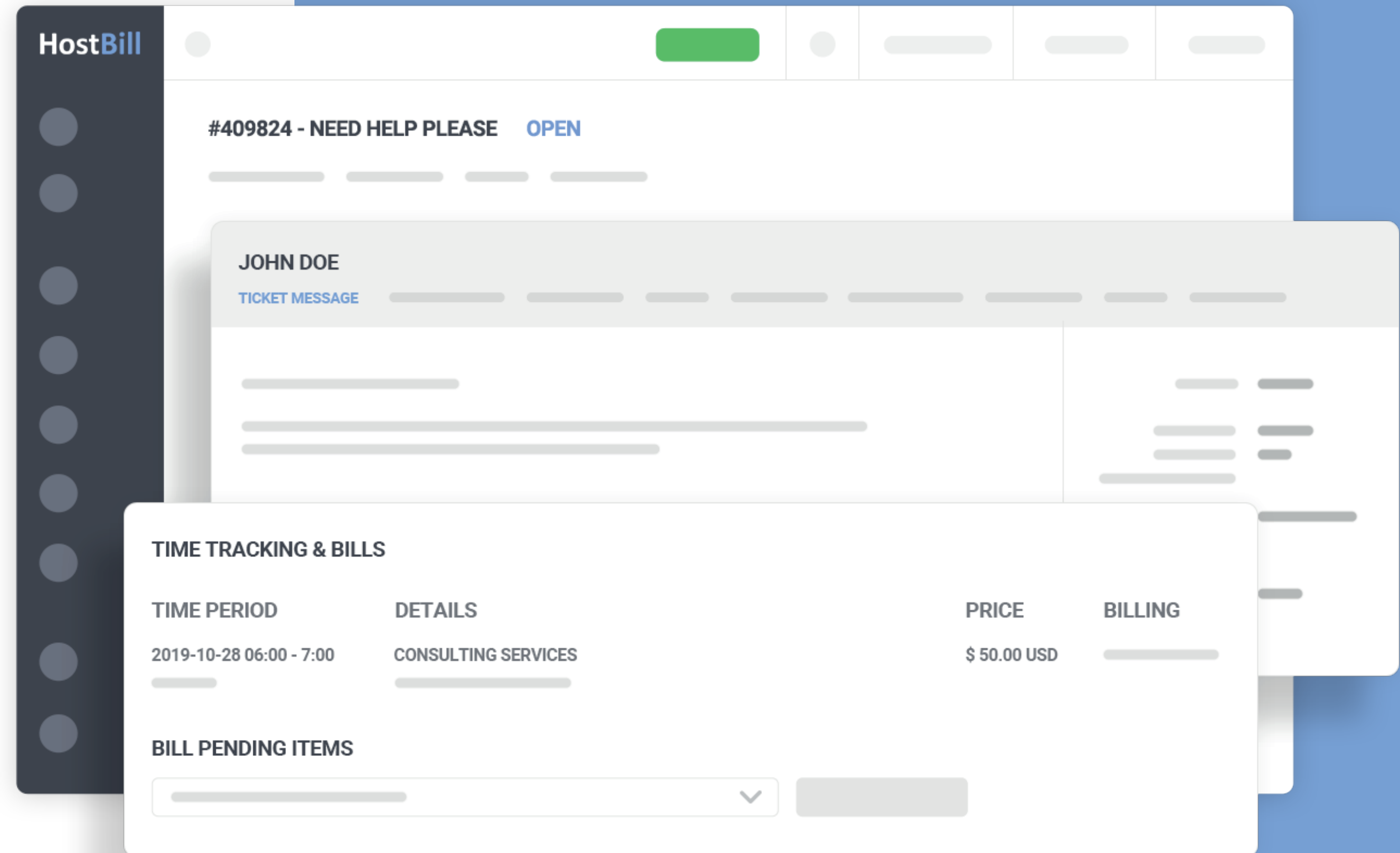
Ticket notifications

Our built-in notification system can notify your staff and/or your customer about new tickets or events in existing tickets that they have access to either via email or on their mobile devices. HostBill also enables notifications directly in your Slack channel or on your desktop. Your staff members can receive notification about all or selected tickets, by subscribing to ticket email notifications.



Ticket billing

If you need to bill your customers for the ticket, you can either send the invoice instantly or add the charge to the next recurring invoice. As different tickets can be billed differently, you can create custom pricing for each task type your support team performs. Additionally, the time spent working on a given ticket can be recorded to enable you to bill accordingly.



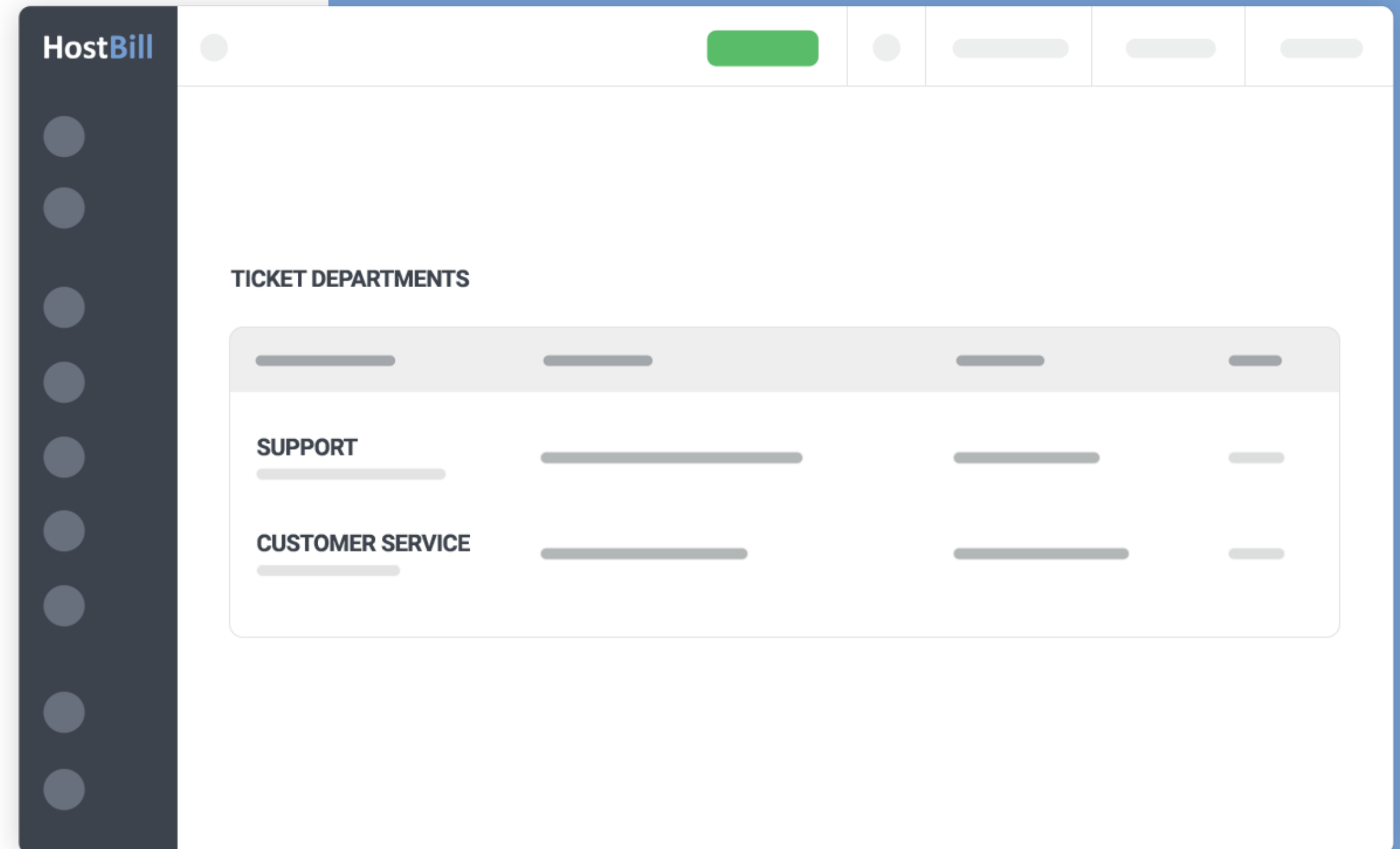
Team - oriented communication

The ability to administer and coordinate your staff, especially when your team is growing, presents many challenges. As we understand the importance of team communication, the ability to effectively delegate tasks and organize your team work, we've designed a number of functionalities to help your workplaces operate smoothly.

Increase the efficiency of your team by proper task delegation and effective communication between team members.

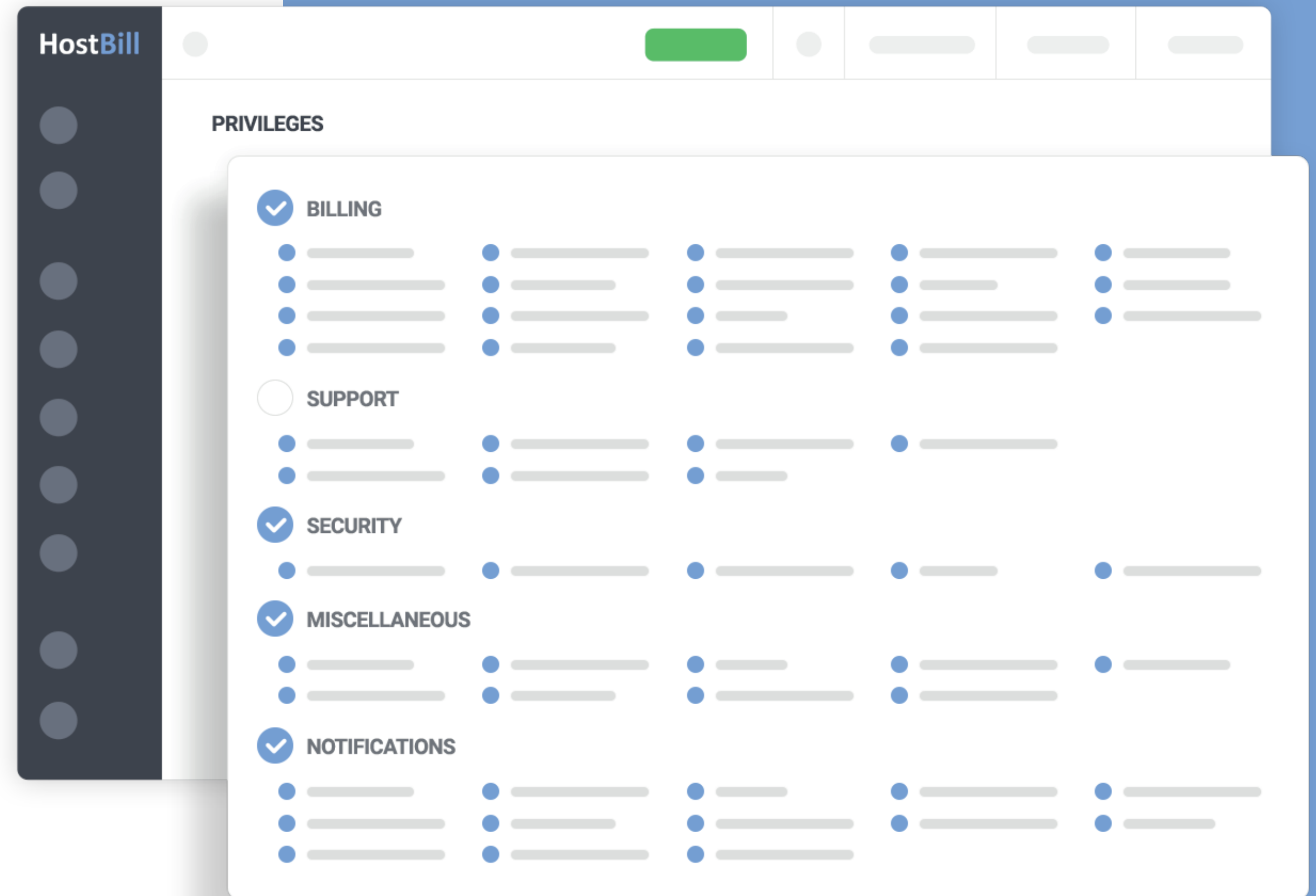
Create multiple departments

To quickly identify support problems and better serve your customers in HostBill you have the ability to create various support departments that focus on solving issues revolving around specific subject. Each department can have its own settings concerning notifications, ticket auto-assignments, setting ticket priority, staff response ratings and more. Divide departments according to their functions (support, billing, pre-sales etc) to better organize your staff and communication with clients!



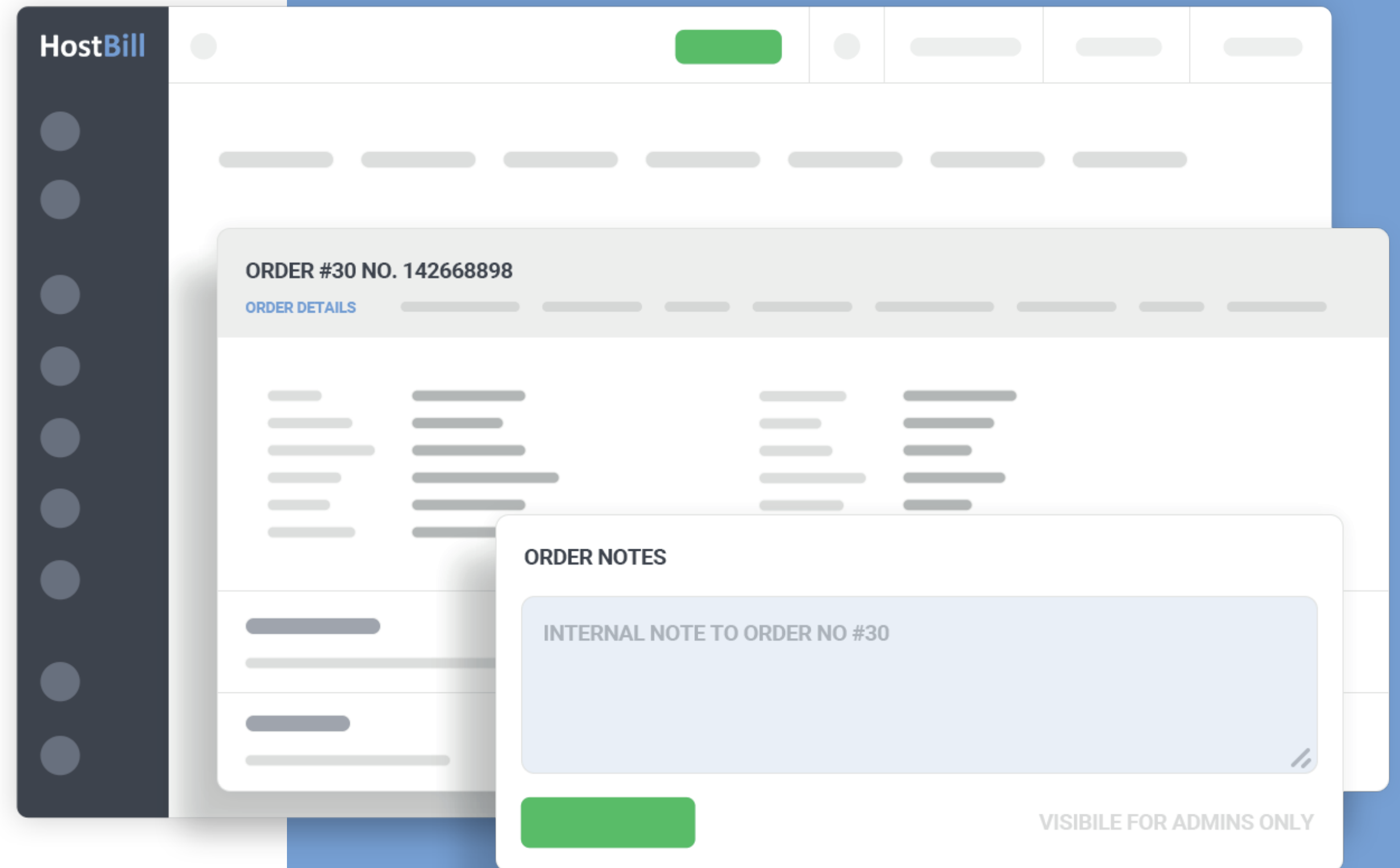
Assign different permission levels to staff teams

In HostBill you can grant your staff members access to different sections and software functionalities. Permission levels can be determined individually for each admin or you can group admins and assign them to the teams with predefined permissions/ACL. Admins assigned to the given team automatically are given the permissions attributed to this team. This way you can easily divide admins into different departments with different permission levels, such as billing team, support team, management team, service team and more.



Effective communication tools

Effective communication is crucial to the team's success. To help your team communicate more efficiently you can use HostBill's internal notes system. In HostBill admin panel you can attach internal notes to literally any part of the project – a specific ticket, account, domain details, invoice, order etc. The notes can be used to explain tasks, describe the progress on task completion or to share ideas. You also have the ability to create internal tickets assigned to the customer but visible only for staff members. This way your staff can start working on a specific issue related with that customer and inform the client only once the problem is solved. Collective work and success lessens the distance between the team's workers and unites the team giving them the feeling that everyone's effort is aimed at the benefit of all.



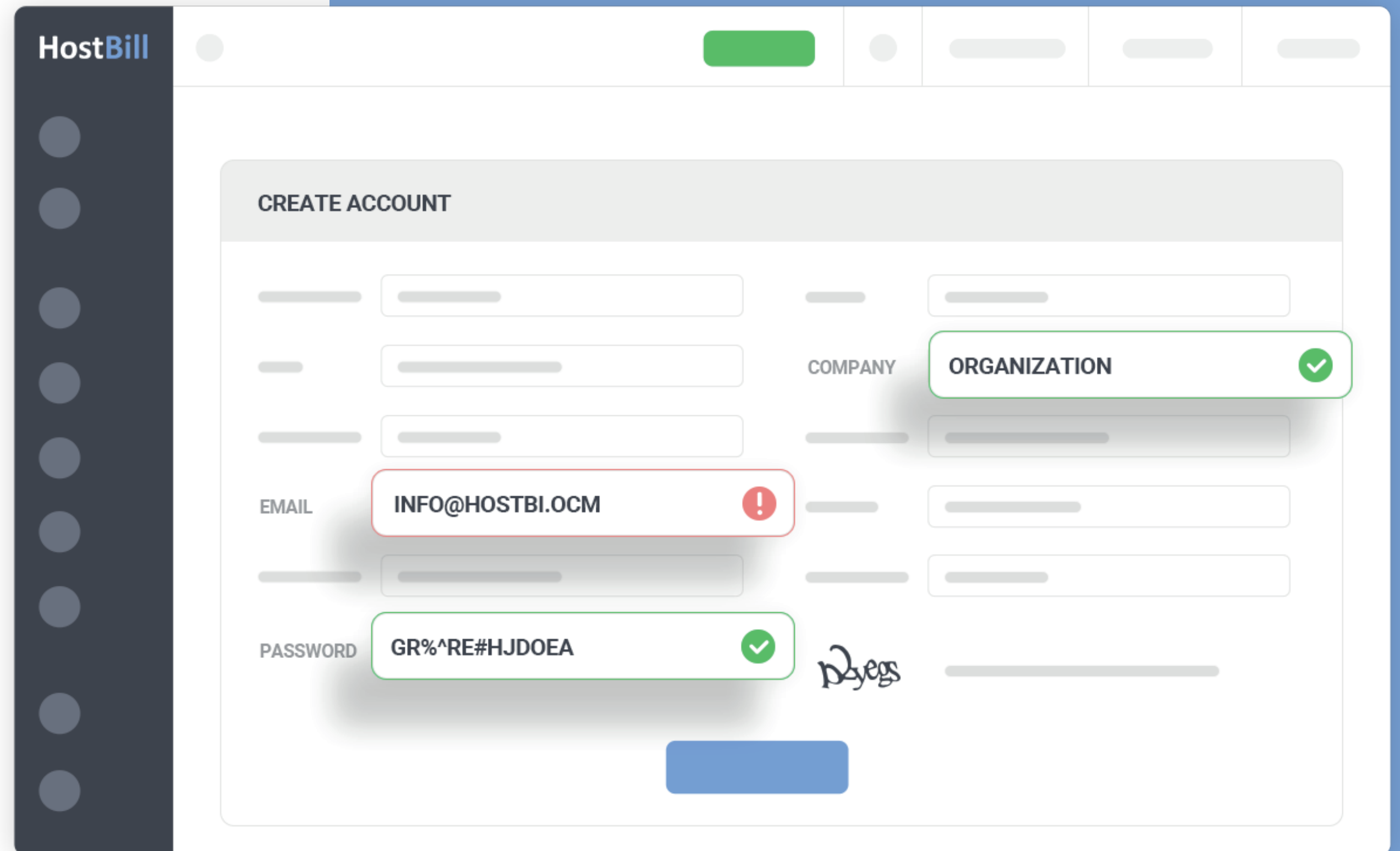
Client management tools

When it comes to client information, every piece of data matters. Organizing and managing valuable information is crucial to understanding clients, establishing business relationships and planning strategies for business growth. Successfully managing clients is an ongoing process, but when done right it can have so many benefits for your business:

increased trust with your team and clients, a growing positive reputation, less stress, and a smoother process for every project you work on.

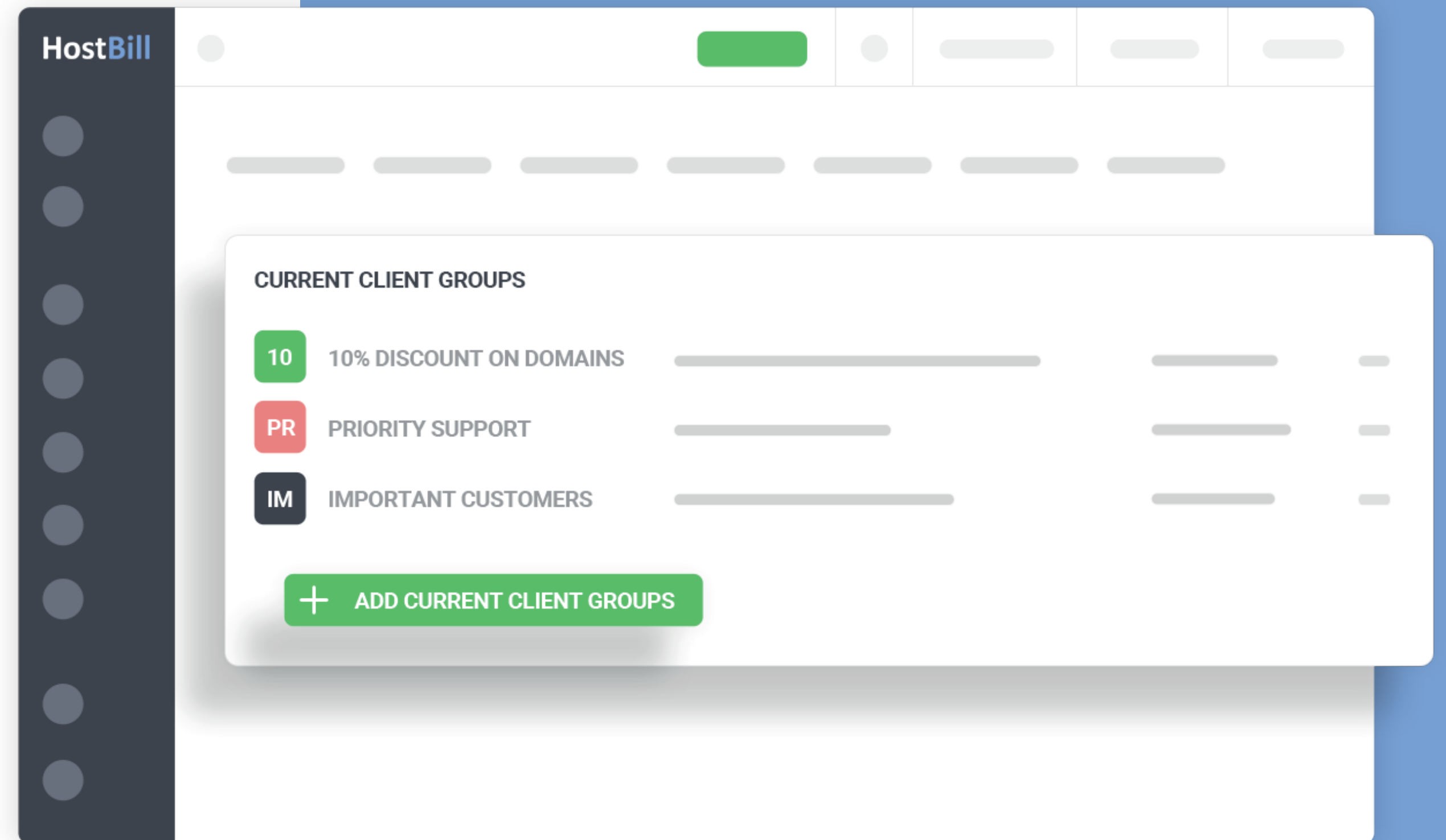
Customize client registration fields

In HostBill you can create customized registration form and define information required upon client signup and stored in client profile. Registration form can be easily created using a range of form fields. The range of options allow you to decide whether or not the field should be editable, displayed on the invoice or visible for client contacts. You can also define fields that will be available only for customers from selected countries and those that can be edited only from admin area. To save you configuration time you can use one of our pre-made field profiles.



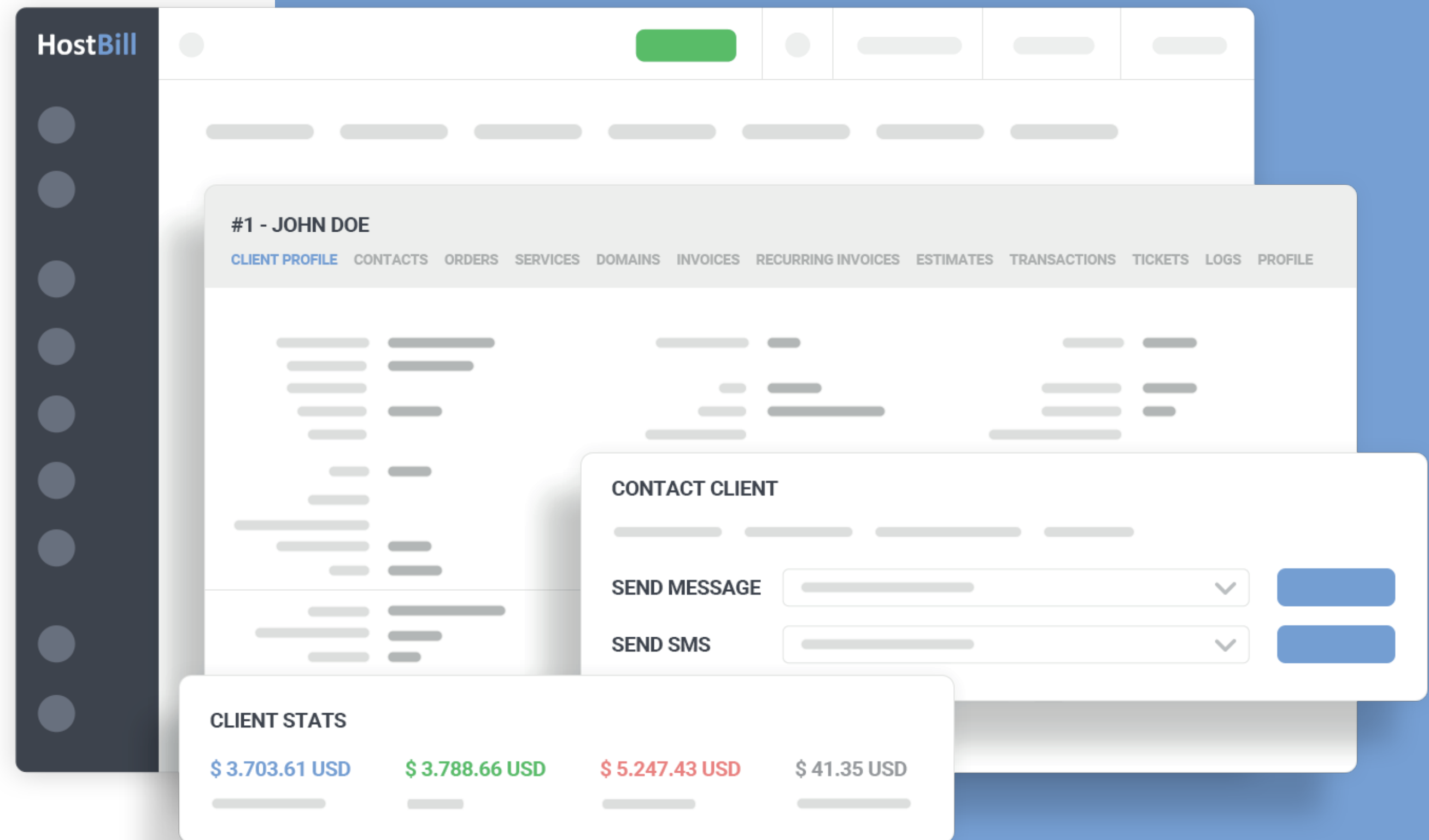
Organize clients into groups

HostBill comes with a handy feature that allows you to organize your customers into groups. This option allows you to select certain group of clients and customize group settings in terms of billing, automation, ordering, support and notifications as well as set group discount, either on specific products or product categories or a 'global' discount applied to all products.



Create comprehensive client profile

Client profile in HostBill unifies all essential client information, including orders, invoices, transactions, services, domains, tickets, contacts, logs and more. To build a complete client profile you also have to ability to attach files, add notes, schedule calendar events. You can also add items to client invoice queue, send notifications and override automation settings.



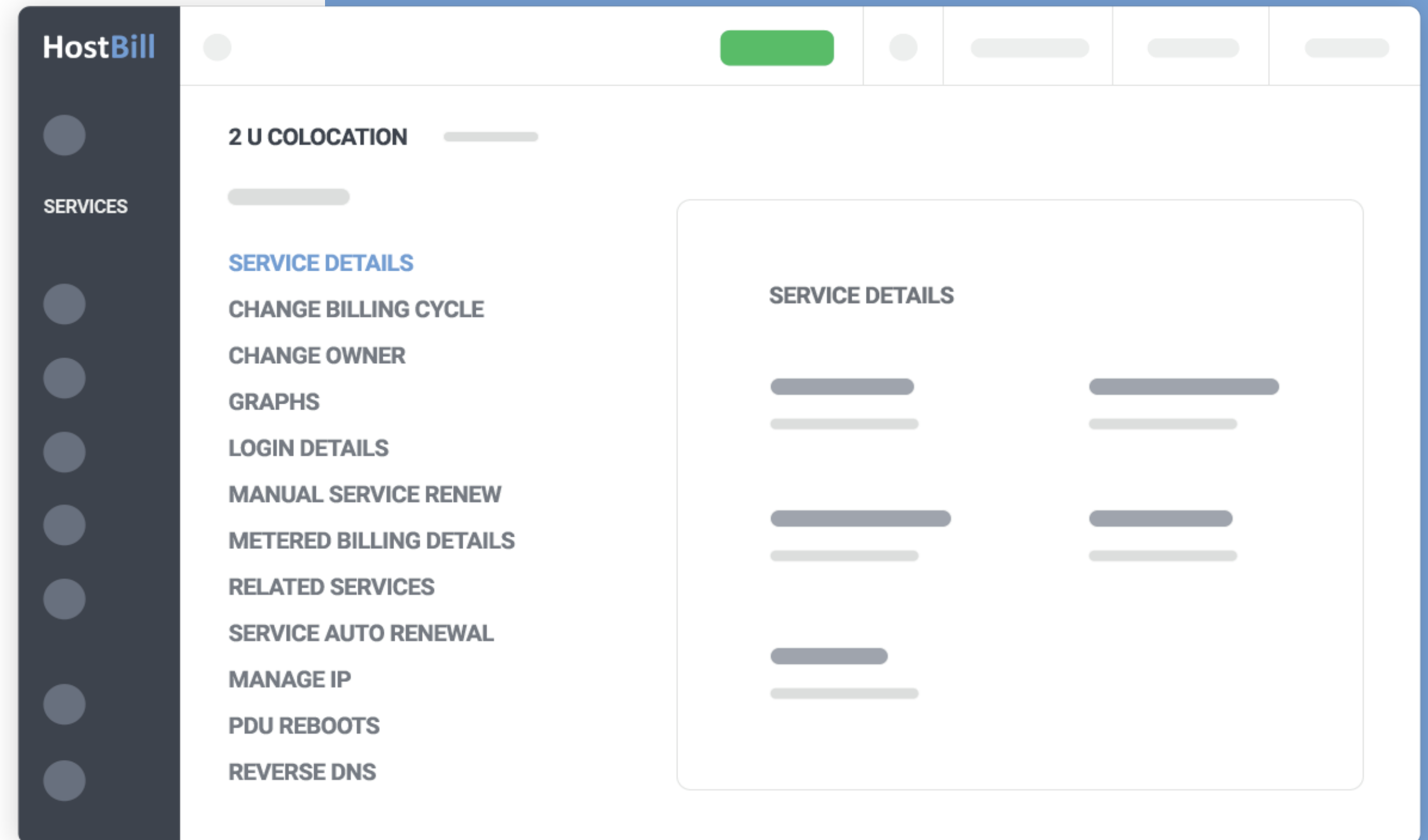
Features under control

The difficulty of working with clients is to set a trustworthy relationship yet with clearly defined rules and boundaries. With HostBill you can give your clients the ability to manage their services in a limited or more broad role. Have full control over what your clients have access to when they log in to your client panel - grant access to certain elements and functionalities and hide what clients don't exactly need to see.

Provide personalized access, satisfy your users and stay in control.

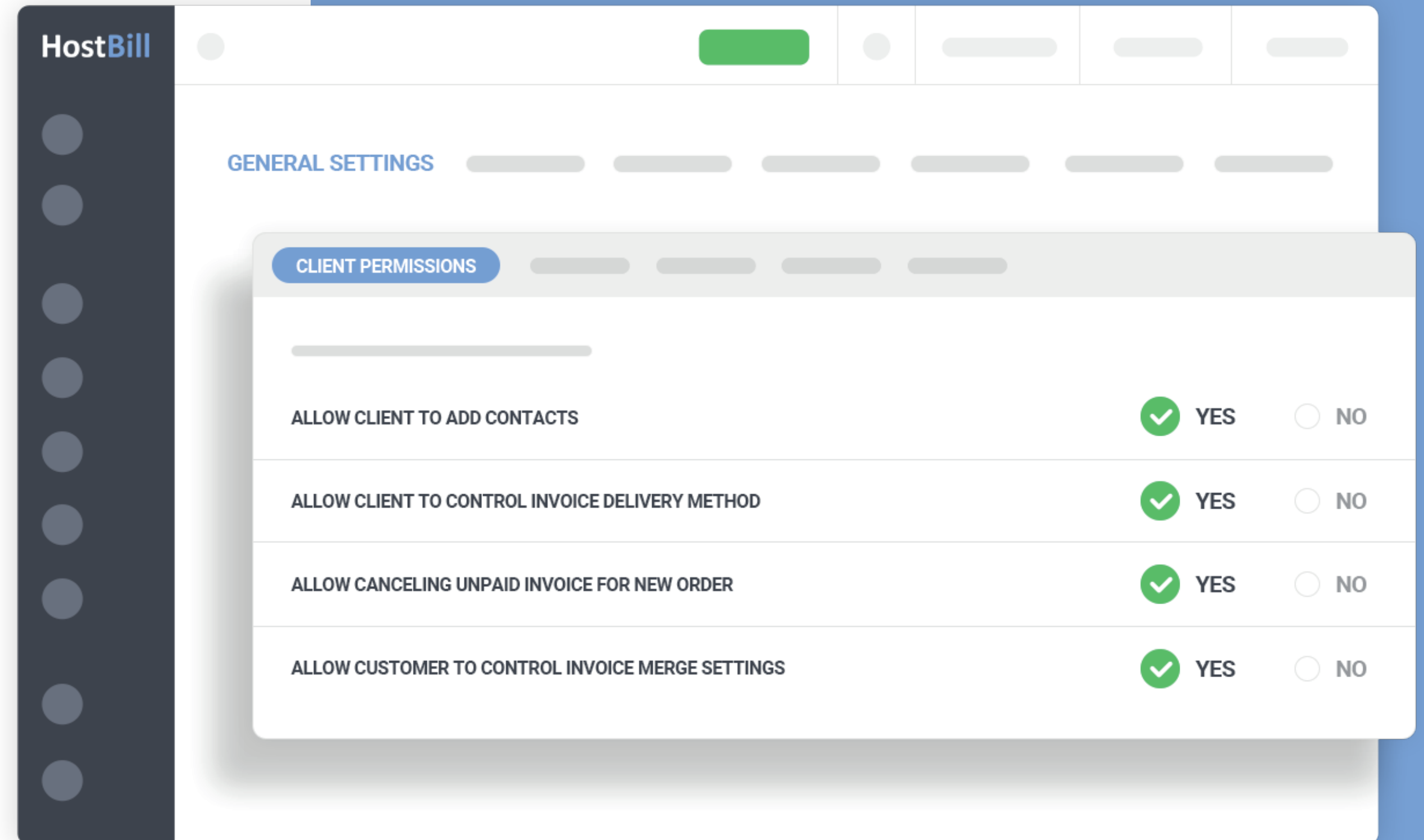
Control service management function access

Control what features customers will have access to in the client portal when managing their services. Client Functions availability can differ depending on the product type and module connected. You can allow customers to manually change billing cycle, control if the service will automatically generate renewal invoices, manually renew (issue invoice) sooner for a given service, list related services, display login credentials, display graphs, change ownership of the service and more. HostBill also enables you to control function appearance in the client portal.



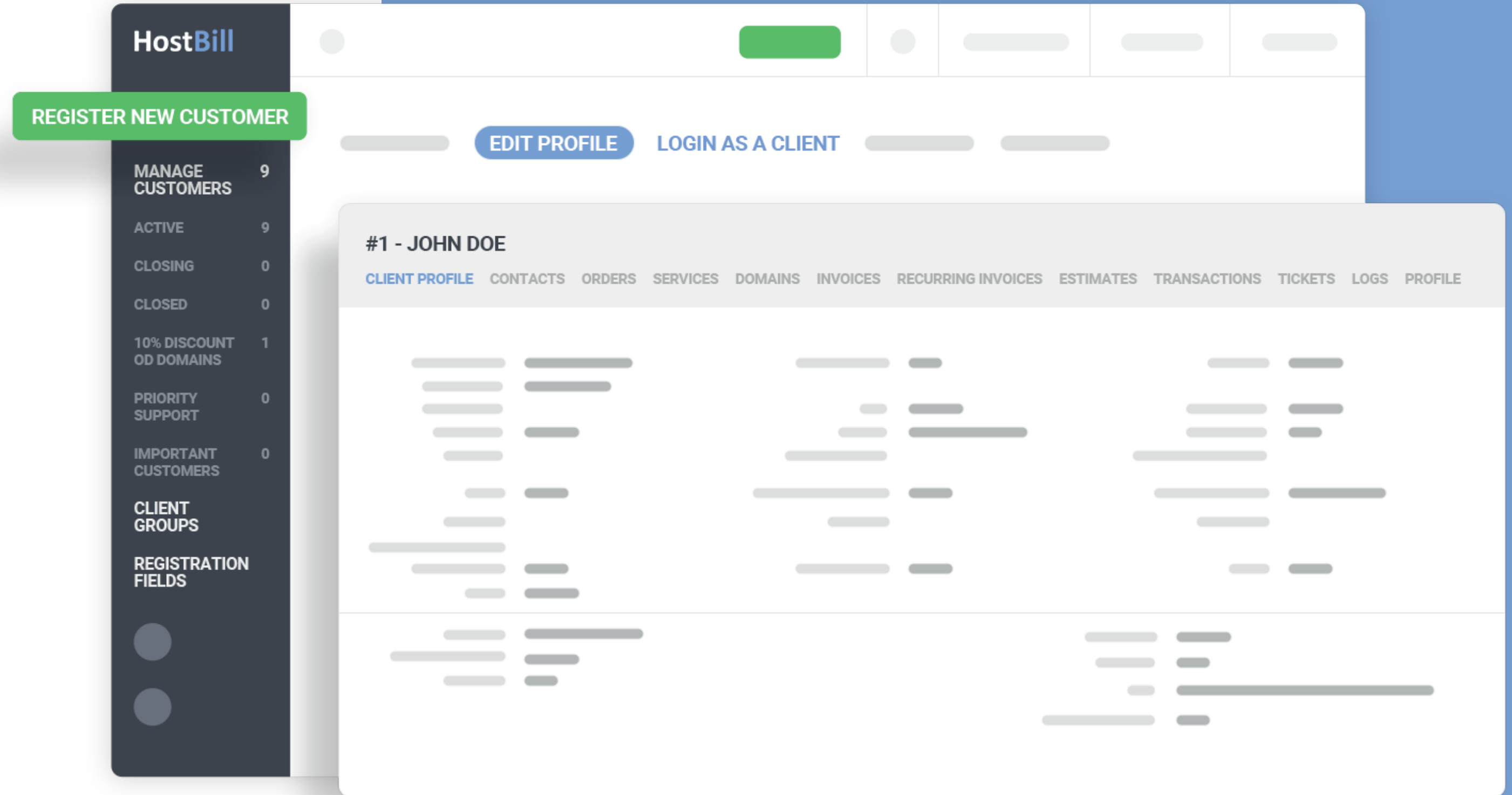
Set different client privileges

In HostBill, set of configurable permissions enable you to decide whether or not to allow clients to perform certain actions such as cancel unpaid invoices, cancel service with unpaid invoice, control invoice merge settings, control automatic credit application, add contacts, view credit log, display canceled or terminated services, set IP access rules, manage ssh keys and more.



Full control over client profile

Admin area grants full access to client profile enabling staff members with relevant level of privileges to browse and edit client information, perform certain actions on behalf of the client and even log in as a client to view the client area from the point of view of the customer, giving you all valuable client information.



Contact

Should you have any questions please contact us at <https://hostbillapp.com/contactus/>

HostBill