

3.009 PayPal Billing Policy

Policy Purpose and Scope

The purpose of this policy is to outline an alternative process for billing PhotoBiz customers via PayPal. This billing method requires pre-approval from the CFO/Controller and should be used only as a last resort method of payment for PhotoBiz customers who have special circumstances. Specifically, customers that may utilize this billing method are outside the US who is having trouble processing the membership charges with their credit cards.

Roles and Responsibilities

CFO/Controller – Responsible for approving alternative billing process via PayPal. Approval of this method will be determined on a case by case basis.

Billing Manager – Once approval has been obtained from the CFO/Controller, the Billing Manager is responsible for initiating contact with the customer regarding the use of the alternative billing method. If the customer agrees, the Billing Manager will be responsible for issuing the invoices and tracking all payments received via PayPal.

Operational Procedures

Identification of Special Circumstances

Special circumstances are identified as part of the regular billing process. Specifically, daily review of the credit card decline report may identify a group of transactions which are declining for a similar purpose. Another means of identifying special circumstances could occur through customer contact when a recurring credit card payment is declined. Examples of special circumstances identified include the following:

- Sun Corp bank located in Australia was not allowing payments to be processed by PhotoBiz. In order to accommodate our Australian customers, we allowed them to be billed via PayPal until the bank problem was resolved.
- A customer from Greece was having difficulty processing their credit card payment due to PhotoBiz not collecting the CVV code from the credit card. This customer was billed via PayPal until a permanent solution is determined.

Once a special circumstance has been identified and confirmed, the CFO/Controller must approve the use of PayPal as an alternative billing method. All correspondence and information is documented in the Ticket System according to the Client's account number.

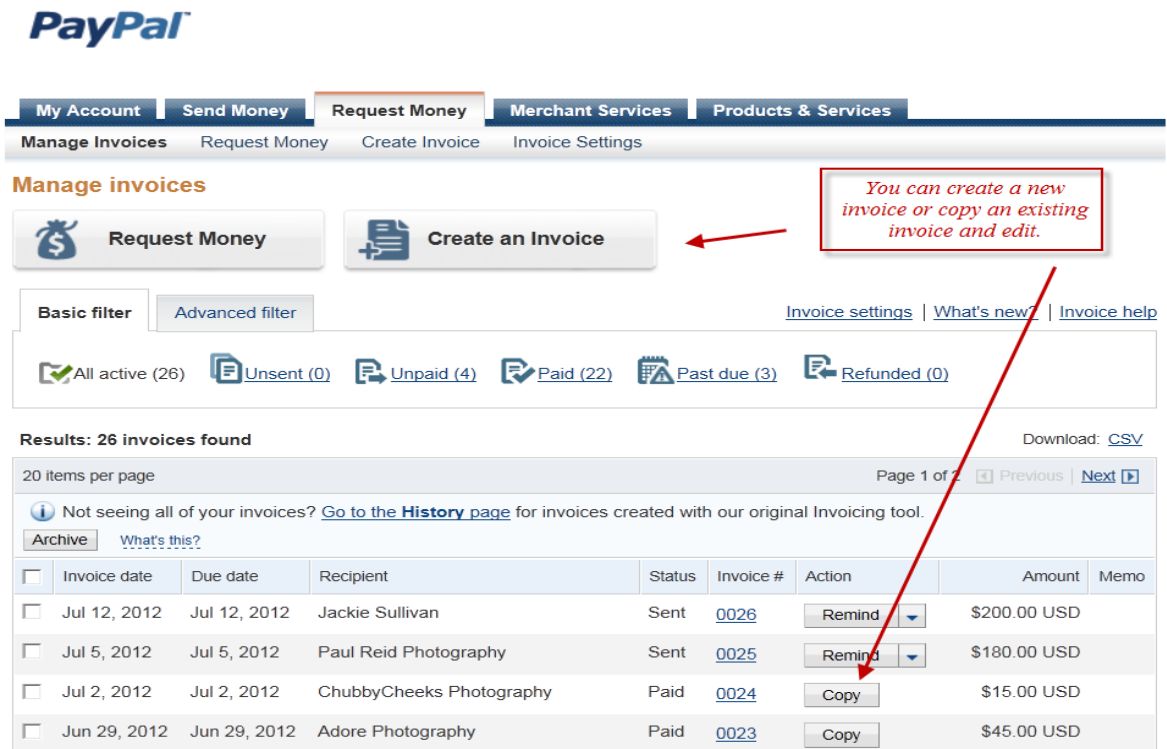
The Billing Manager will then contact the customer to determine if they would be interested in making payment via a PayPal invoice. Agreement from the customer must be obtained prior to any invoicing through PayPal.

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Invoicing Process

The Billing Manager accesses the PhotoBiz PayPal account to generate the invoice prior to the customers' billing dates. The following steps are taken when generating an invoice via the PayPal account.

- From the main menu, select the Request Money icon. This will redirect you to the Manage Invoices screen.
- Once at the Manage Invoices screen, invoices can be generated by creating a new invoice or copying an old invoice. For efficiency purposes, copying an existing invoice and changing the necessary billing information is generally acceptable.



PayPal

My Account | Send Money | **Request Money** | Merchant Services | Products & Services

Manage Invoices | Request Money | Create Invoice | Invoice Settings

Manage invoices

Request Money **Create an Invoice**

Basic filter | Advanced filter | Invoice settings | What's new? | Invoice help

☒ All active (26) ☐ Unsent (0) ☐ Unpaid (4) ☐ Paid (22) ☐ Past due (3) ☐ Refunded (0)

Results: 26 invoices found Download: [CSV](#)

20 items per page Page 1 of 2 [Previous](#) [Next](#)

Not seeing all of your invoices? [Go to the History page](#) for invoices created with our original Invoicing tool.


[Archive](#) [What's this?](#)

<input type="checkbox"/>	Invoice date	Due date	Recipient	Status	Invoice #	Action	Amount	Memo
<input type="checkbox"/>	Jul 12, 2012	Jul 12, 2012	Jackie Sullivan	Sent	0026	Remind	\$200.00 USD	
<input type="checkbox"/>	Jul 5, 2012	Jul 5, 2012	Paul Reid Photography	Sent	0025	Remind	\$180.00 USD	
<input type="checkbox"/>	Jul 2, 2012	Jul 2, 2012	ChubbyCheeks Photography	Paid	0024	Copy	\$15.00 USD	
<input type="checkbox"/>	Jun 29, 2012	Jun 29, 2012	Adore Photography	Paid	0023	Copy	\$45.00 USD	

- Select edit to input the correct billing information in the copied invoice, select preview to review the invoice for accuracy. If all the information is correct, print a copy of the invoice for the billing records and then click on “Send” to send the invoice to the customer. The invoice will have an embedded link for the customer to follow to pay their invoice via PayPal.

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Test Sample Invoice


INVOICE

Photobiz.com
Billing & Member Services
516 W Friendly Ave
Greensboro, NC 27401
United States

Phone: 866-463-7620
pbizpaypal@photobiz.com

Bill To
billing@photobiz.com
Debra Britton
Britton Photography
Account # 100-11133

Invoice number	0001
Invoice date	5/30/2012
Payment terms	Due on receipt
Due date	5/30/2012

Description	Quantity	Unit price	Amount
PhotoBiz Membership - Copper Plan - 200 Images	1	\$15.00	\$15.00
<div style="display: flex; justify-content: space-between;"> <div style="width: 55%;"> <p>Note to recipient If you need further assistance, please do not hesitate to contact us.</p> <p>We are passionate about providing you with the best customer service possible.</p> <p>PhotoBiz Billing Team</p> <p>Toll Free - 866-463-7620 Worldwide Toll Free (Skype) - +1 866-463-7620</p> </div> <div style="width: 40%; text-align: right;"> <p>Subtotal</p> <p>\$15.00</p> </div> </div>			
Total			\$15.00 USD

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Receiving Payments

Review Manage Invoices to determine if an invoice is paid. Also an email confirmation will be sent when an invoice is paid. The CFO/Controller receives an email notification from PayPal. The CFO/Controller forwards the email notification to the Billing Manager for updating of the billing records. The Billing Manager notes on the invoice copy that the invoice was paid and updates the client's account in the PhotoBiz Billing System (Intranet). The Billing Manager will manually set the customer's account to active once the payment is made.

<input type="checkbox"/>	May 30, 2012	May 30, 2012	Debra Britton	Paid	0001	Copy	\$15.00 USD
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Non Payment Procedure

Membership payment must be made within 5 days of receiving the initial invoice. A second invoice is sent 3 days after the initial invoice. If payment is not made by the customer, the account will be placed on Notify1 and the account will follow the regular process for non-payment. (See section 3.4 for details regarding the regular process for non-payment.)

Documentation

Each account that is billed using PayPal has a specific ticket number to track all correspondence, PayPal payments and activity. Each PayPal membership payment is documented in the "Old Data" on each account in the billing system. Also, a spreadsheet is maintained in Google Docs that details invoice dates, payments, account numbers and ticket numbers.

Google Doc: Australian Clients with Billing Issues

<https://docs.google.com/spreadsheet/ccc?key=0AmHt2MvRFuvqdDNtRVBrCHlnWnFrdExqeDNCN1BhbEE>