

Customers

The Customers module is used to manage customer accounts, billing configurations, portal access, and integrations.

Important: Customers must first be connected and synchronized with QuickBooks Online before they can be managed in Kwiqli.

Viewing Customers

1. Click the Customers tab.
2. Review the customer list.
3. Use the Search bar to locate a customer by:
 - Customer name
 - Company name
 - Email address
 - Click View beside a customer to open the account.

Dashboard

kwiqli

DashboardCustomersProductsInvoicesSettingsActivity LogsSupportSign Out

Linked Customers

Actions

Search customer ...

Date retrieved time: 1h 19m ago

☐	CUSTOMER NAME	EMAIL	OPEN BALANCE (\$)	AUTO-INVOICE	AUTO-PAY	LAST UPDATED	
☐			\$250.00	☒	☒	2026-05-14 10:33:37	View
☐			\$500.00	☒	☒	2026-04-29 08:38:37	View
☐			\$250.00	☒	☒	2026-05-15 06:12:24	View
☐			\$643.11	☒	☒	2026-05-01 05:30:50	View
☐			\$3.00	☒	☒	2026-04-30 02:04:24	View
☐			\$1,000.00	☒	☒	2026-05-13 22:33:55	View

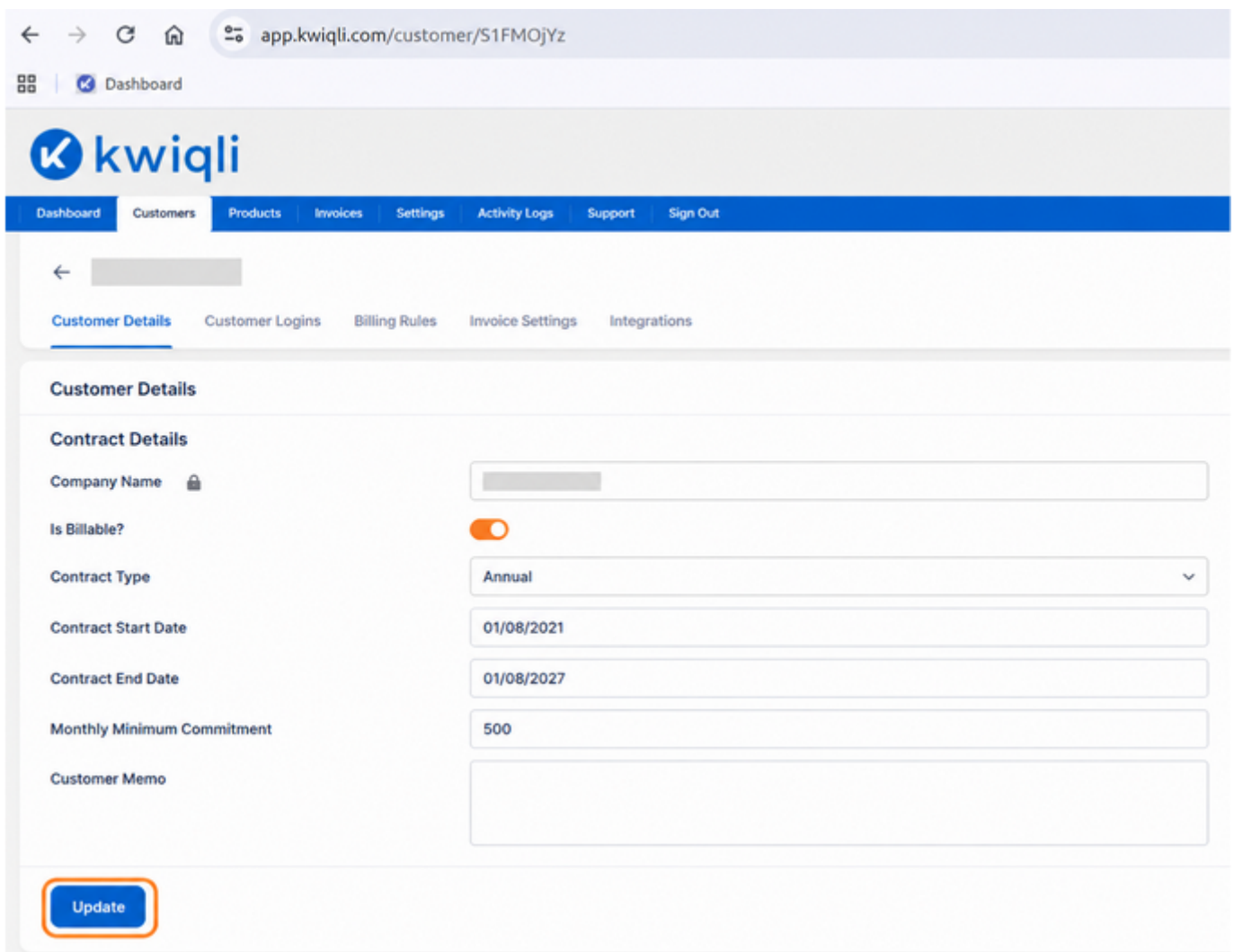
Functions

- View customer balances
- Check Auto-Invoice status
- Check Auto-Pay status
- Review account updates

Customer Details

1. Open a customer profile.
2. Select the Customer Details tab.
3. Update the following information as needed:

- Contract Type
- Contract Start Date
- Contract End Date
- Monthly Minimum Commitment
- Customer Memo
- Enable or disable the Is Billable toggle.
- Click Update to save changes.



The screenshot shows the Kwiqli web application interface. At the top, the browser address bar displays 'app.kwiqli.com/customer/S1FMOjYz'. Below the browser bar is a navigation bar with the Kwiqli logo and a 'Dashboard' link. A secondary navigation bar contains links for 'Dashboard', 'Customers', 'Products', 'Invoices', 'Settings', 'Activity Logs', 'Support', and 'Sign Out'. The 'Customers' section is active, and a sub-navigation bar shows 'Customer Details', 'Customer Logins', 'Billing Rules', 'Invoice Settings', and 'Integrations'. The 'Customer Details' page is titled 'Customer Details' and contains a 'Contract Details' section. This section includes several form fields: 'Company Name' with a lock icon, 'Is Billable?' with an orange toggle switch, 'Contract Type' with a dropdown menu set to 'Annual', 'Contract Start Date' with the value '01/08/2021', 'Contract End Date' with the value '01/08/2027', 'Monthly Minimum Commitment' with the value '500', and 'Customer Memo' with a large text area. At the bottom left of the form, there is a blue 'Update' button with an orange border.

app.kwiqli.com/customer/S1FMOjYz

Dashboard

kwiqli

Dashboard Customers Products Invoices Settings Activity Logs Support Sign Out

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Customer Details Customer Logins Billing Rules Invoice Settings Integrations

Customer Details

Contract Details

Company Name 

Is Billable? 

Contract Type Annual 

Contract Start Date 01/08/2021

Contract End Date 01/08/2027

Monthly Minimum Commitment 500

Customer Memo

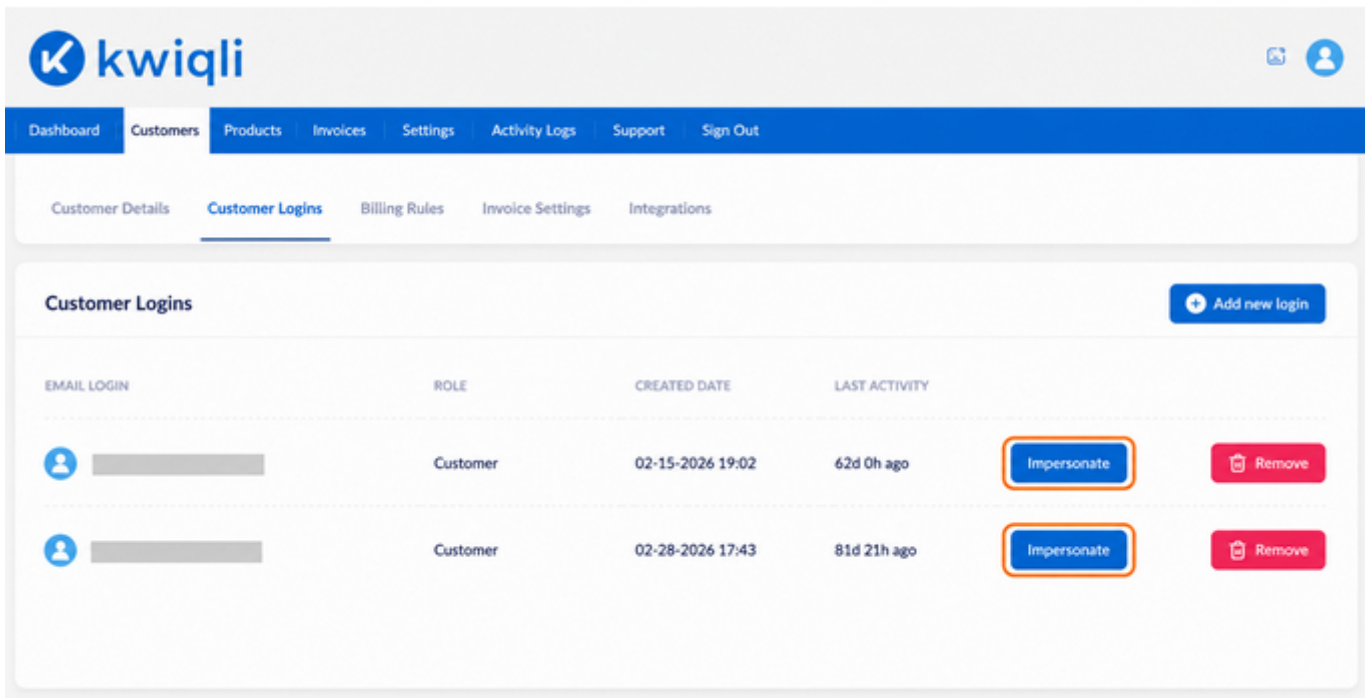
Update

Functions

- Manage customer billing eligibility
 - Store contract details
 - Add internal account notes
-

Customer Logins

1. Open a customer profile.
2. Click the Customer Logins tab.
3. To add a portal user:
 - Click Add New Login
 - Enter the customer email
 - Assign the role
 - Save the login
 - To remove access:
 - Click Remove
 - To troubleshoot customer access:
 - Click Impersonate



Functions

- Manage customer portal access
- Troubleshoot customer accounts
- Monitor portal activity

Billing Rules

1. Open a customer profile.
2. Select the Billing Rules tab.
3. Click Add New Billing Rule.
4. Configure:
 - Product
 - Pricing Type
 - Tiered Pricing
 - Descriptions
 - Save the billing rule.
 - To edit a rule:
 - Click Edit
 - Update the configuration
 - Save changes






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←
Customer Details
Customer Logins
Billing Rules
Invoice Settings
Integrations

Add New Billing Rule

☐	SPECIAL RULE	PRODUCT	DESCRIPTION	PRICING TYPE	RATES	
☐		Call Recording License	[range]	Tier-based	1 - 2500: \$5.000 2501 - 5000: \$4.800 50001 - 10000: \$4.500 10001 - 25000: \$4.200 25001 - 100000: \$4.000	Edit
☐		Chat Connector License	2600Hz	Tier-based	1 - 2500: \$1.000 2501 - 50000: \$0.900 50001 - 10000: \$0.800 10001 - 25000: \$0.720 25001 - 100000: \$0.640	Edit
☐		Operator Connect Express License	2600Hz	Tier-based	1 - 2500: \$0.300 2501 - 50000: \$0.300 50001 - 10000: \$0.300 10001 - 25000: \$0.300 25001 - 100000: \$0.300	Edit
☐		PBX Connector License	2600Hz	Tier-based	1 - 2500: \$1.500 2501 - 50000: \$1.200 50001 - 10000: \$0.900 10001 - 25000: \$0.800 25001 - 100000: \$0.700	Edit
☐		Calling App License	[range]	Tier-based	1 - 2500: \$2.500 2501 - 50000: \$2.200 50001 - 10000: \$2.000 10001 - 25000: \$1.800 25001 - 100000: \$1.500	Edit

Functions

- Automate recurring billing
- Configure tier-based pricing
- Manage usage billing

The screenshot shows the Kwiqli web interface. The top navigation bar includes links for Dashboard, Customers, Products, Invoices, Settings, Activity Logs, Support, and Sign Out. Below this, a sub-navigation bar shows Customer Details, Customer Logins, Billing Rules (which is highlighted), Invoice Settings, and Integrations. The main content area is titled 'Billing Rules' and contains the following fields and controls:

- Rule Condition:** Two radio buttons, 'Default' (selected) and 'Special condition'.
- Product/Item:** A text input field.
- Description:** A text area containing the text: 'Standard pricing tiers for the selected product. Rates apply per quantity range as defined below.'
- Pricing Method:** Two radio buttons, 'Volume-based Pricing' (selected) and 'Tier-based Pricing'.
- Pricing Rules:** A table with three columns: 'Quantity From', 'Quantity To', and 'Rate'.

Quantity From	Quantity To	Rate
1	100000	0

Below the table is a green '+' icon for adding more rules.
- Submit:** A blue button with a white border, highlighted with an orange rectangle.

Understanding Billing Rules

A Billing Rule is an automated billing configuration that tells Kwiqli how and when to charge a customer for a product or service.

Billing Rules automatically generate invoice charges based on predefined pricing and billing settings, eliminating the need for manual invoice creation.

Common Uses for Billing Rules

Billing Rules can be used for:

- Recurring monthly services
- Usage-based billing
- Tier-based pricing
- Minimum monthly commitments
- Annual or one-time charges

Example

A customer may be billed monthly for:

- Calling App Licenses
- Call Recording Licenses
- Support Services

Tier-Based Pricing Example

Quantity Range	Price Per Unit
1-2500	\$5.00
2501-5000	\$4.80
5001-10000	\$4.50

How Billing Rules Work

1. Create a Product or Service
2. Assign the Product to a Customer
3. Configure Pricing and Billing Logic
4. Enable Auto-Invoice
5. Kwiqli Automatically Generates Invoice Charges

Benefits of Billing Rules

- Automates recurring billing
- Reduces manual invoicing
- Improves billing accuracy
- Supports tiered and usage pricing

- Simplifies customer billing management

Invoice Settings

1. Open a customer profile.
2. Select the Invoice Settings tab.
3. Configure:

- Invoice Template
- Invoice Date
- Auto-Invoice
- Payment Method
- Click Update after making changes.

The screenshot displays the Kwiqli web interface. At the top, there's a navigation bar with 'Dashboard' and 'Customers' tabs. Below this, a sub-navigation bar shows 'Customer Details', 'Customer Logins', 'Billing Rules', 'Invoice Settings' (which is underlined), and 'Integrations'. The main content area is titled 'Invoice Settings'. It contains two sections: 'Invoice Template' and 'Payment Methods'. The 'Invoice Template' section has three settings: 'Item List' set to 'Detailed Item List (default)', 'Invoice Date' set to 'Day 1 of the month', and 'Auto-Invoice' which is a toggle switch currently turned on. Below these settings is a blue 'Update' button with an orange border. The 'Payment Methods' section has one setting: 'Payment Method' set to 'Nexio'. Below this is another blue 'Update' button with an orange border.

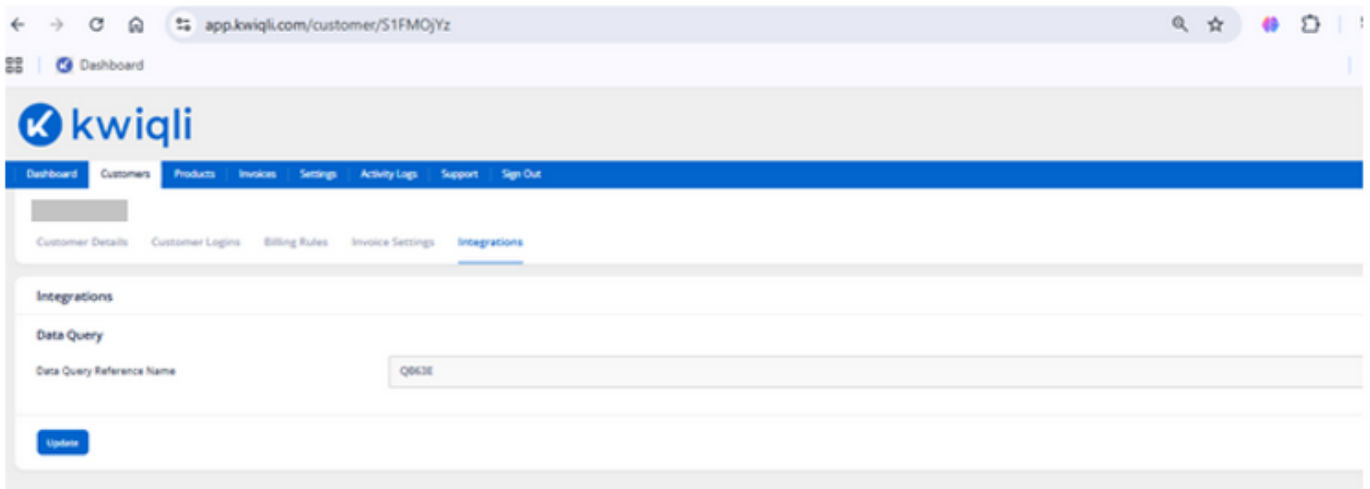
Functions

- Configure customer billing schedules
- Enable automatic invoice generation

- Assign payment gateways

Customer Integrations

1. Open a customer profile.
2. Click the Integrations tab.
3. Enter the customer integration reference or QuickBooks ID.
4. Click Update.



Functions

- Store QuickBooks customer references
- Link external systems
- Configure customer-specific integration

Revision #2

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