

Remote billing in Zoho Assist

The Billing feature manages periodic customer billing for any remote service a support technicians has provided. This feature allows organization to track and compute bills based on both session count and session hours. For hassle-free automatic billing:

- Create a billing plan
- Associate customers to the billing plan

To create a billing plan

Based on the services provided, create a unique billing plan to associate with individual customer. To create a billing plan:

- 1. Log in to Zoho Assist using your credentials.
- 2. Navigate to **Settings> Organization> Billing> Billing Plans** and click **Get Started.**
- 3. Enter the Plan name and currency, and choose the billing type. The billing type defines the cost per session, cost per hour, and unattended device cost.
- 4. Define your rate as cost per hour or per session count in the billing plan.
- 5. You can either associate the billing plan with the customer now or later.

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To associate customers

a. Click Associate. Associate customers window will appear, as shown below.

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© Integrations		Department	Associate custome	rs to a billing plan to start charging them for the remote support assistance. Associate Customers Cancel Create Create	
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- b. Choose **Department**, **Billing Cycle**, **Bill Start Date**, and enter due days and the billing address for the customer. Click **Add**.
- c. Click **Create.**

To associate later

a. Once a billing plan is created, it will be listed under Billing Plans. To associate, click **Associate Customers**.

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- b. Choose **Department**, **Billing Cycle**, **Bill Start Date**, and enter due days and the billing address for the customer.
- c. Click Add.

To view, edit and delete the Billing plan

You can view, modify the plan details and delete the billing plan by clicking three dots icon and choosing **View**, **Edit** and **Delete** respectively.

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Manage invoices

You can organize and manage auto-generated bills, and set up customer invoicing cycles after associating a plan with a customer. You can also:

- Change the payment status
- Make adjustments (additional charges /discounts)
- Download and mail the bill

To change the payment status

Bills are listed along with their charge details and billing status, under **Bills** tab as shown in the image below. To change the payment status, click on the three dots icon and select **Confirm Payment**.

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Remote support		5391908	8110001345678	My Department	01/24/2023		02/24/2023	03/24/2023	Add	USD110	PAID	
		4567834	4562789102987	My Department	01/22/2023		02/22/2023	03/22/2023	Add	USD100	PAID	
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۲	Ø	Confirm Payment	213243324556	My Department	01/17/2023		02/17/2023	03/17/2023	Add	USD100	PAID	
Security & Compliance	~	Email Invoice	242552617289	My Department	01/15/2023		02/15/2023	03/15/2023	Add	USD110	NOT PAID	
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To make adjustments

- You can adjust the total session charge by adding charges or discounts to any bill listed. To do this, click the three dots icon and select **Add Charges**.
- A window will appear, as shown below. Choose the adjustment type and enter a value. Click **Add** to include the adjustment value in the total session charge.

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To download and mail the bill

To download or mail a bill, click the three dots icon and select either **Download Bill** or **Email Invoice.**

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General			Bill ID		Customer	Bill Start Date	•	End Date	Due Date	Misc Charges	Total Amount	Status		
			5664583	110001317017	My Department	01/25/2023		02/25/2023	03/25/2023	Add	USD120	NOT PAID		
Remote support			5391908	110001345678	My Department	01/24/2023		02/24/2023	03/24/2023	Add	USD110	PAID		
			4567834	562789102987	My Department	01/22/2023		02/22/2023	03/22/2023	Add	USD100	PAID		
Unattended Access			5443383	000001317017	My Department	01/20/2023		02/20/2023	03/20/2023	Add	USD120	NOT PAID		
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