



# 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:

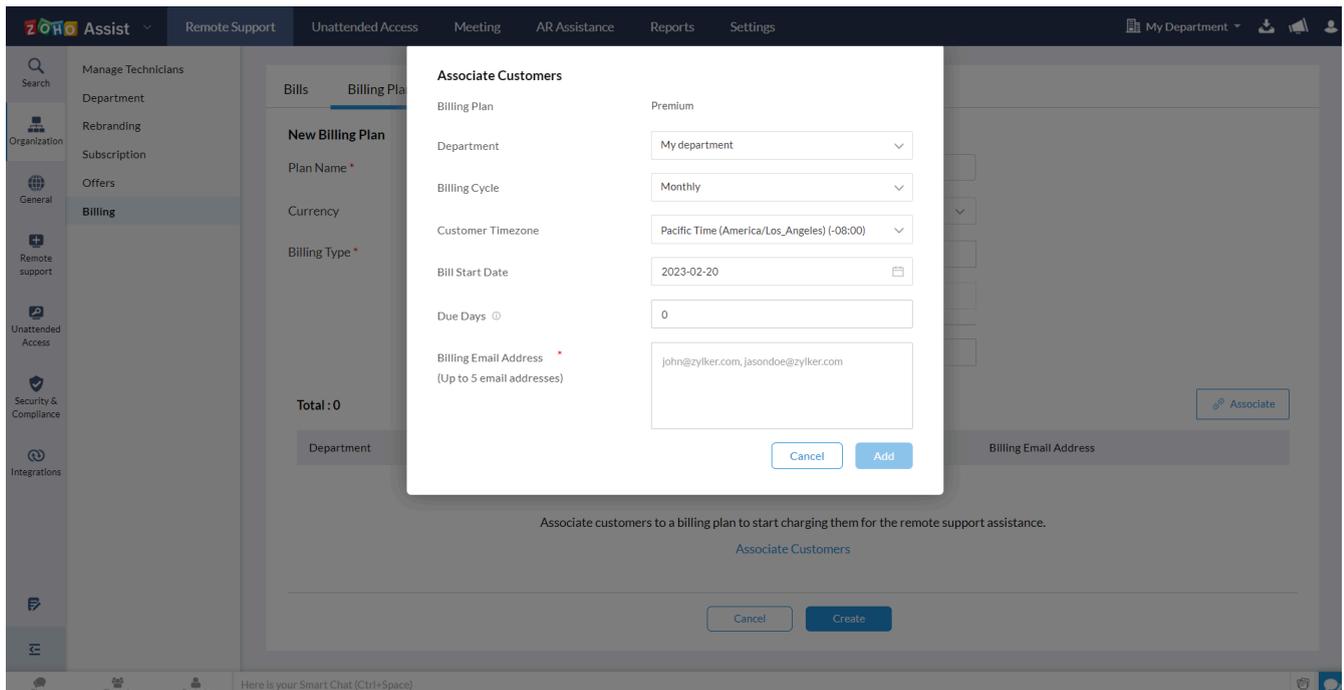
1. Log in to [Zoho Assist](#) using your credentials.
2. Navigate to **Settings**> **Organization**> **Billing**> **Billing Plans** and click **Get Started**.
3. Enter the Plan name and currency, and choose the billing type. The billing type defines the cost per session, cost per hour, and unattended 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.

The screenshot shows the Zoho Assist interface for creating a new billing plan. The top navigation bar includes 'Assist', 'Remote Support', 'Unattended Access', 'Meeting', 'AR Assistance', 'Reports', and 'Settings'. The left sidebar lists various management options, with 'Billing' selected under the 'General' category. The main content area is titled 'Bills' and 'Billing Plans', and contains a 'New Billing Plan' form. The form includes fields for 'Plan Name' (with a 100-character limit), 'Currency' (set to 'US Dollar (USD)'), and 'Billing Type' (with radio buttons for 'Cost per Session', 'Cost per Hour', and 'Unattended device cost'). The 'Total' is currently 0. A tooltip explains that the unattended device cost represents the maintenance cost for unattended devices. Below the form is a table with columns for 'Department', 'Billing Cycle', 'Bill Start Date', 'Due Days', and 'Billing Email Address'. At the bottom, there are 'Cancel' and 'Create' buttons, and a link to 'Associate Customers'.

## To associate customers

## To associate now

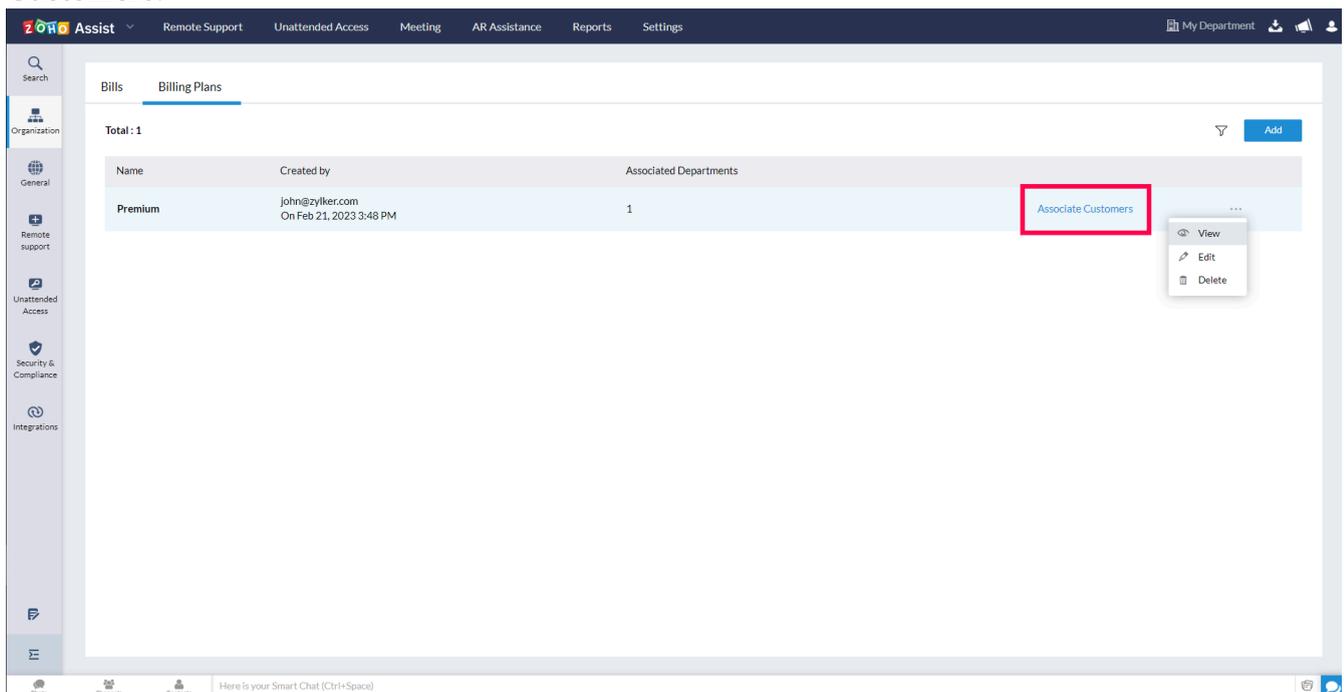
- Click **Associate**. Associate customers window will appear, as shown below.



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

## To associate later

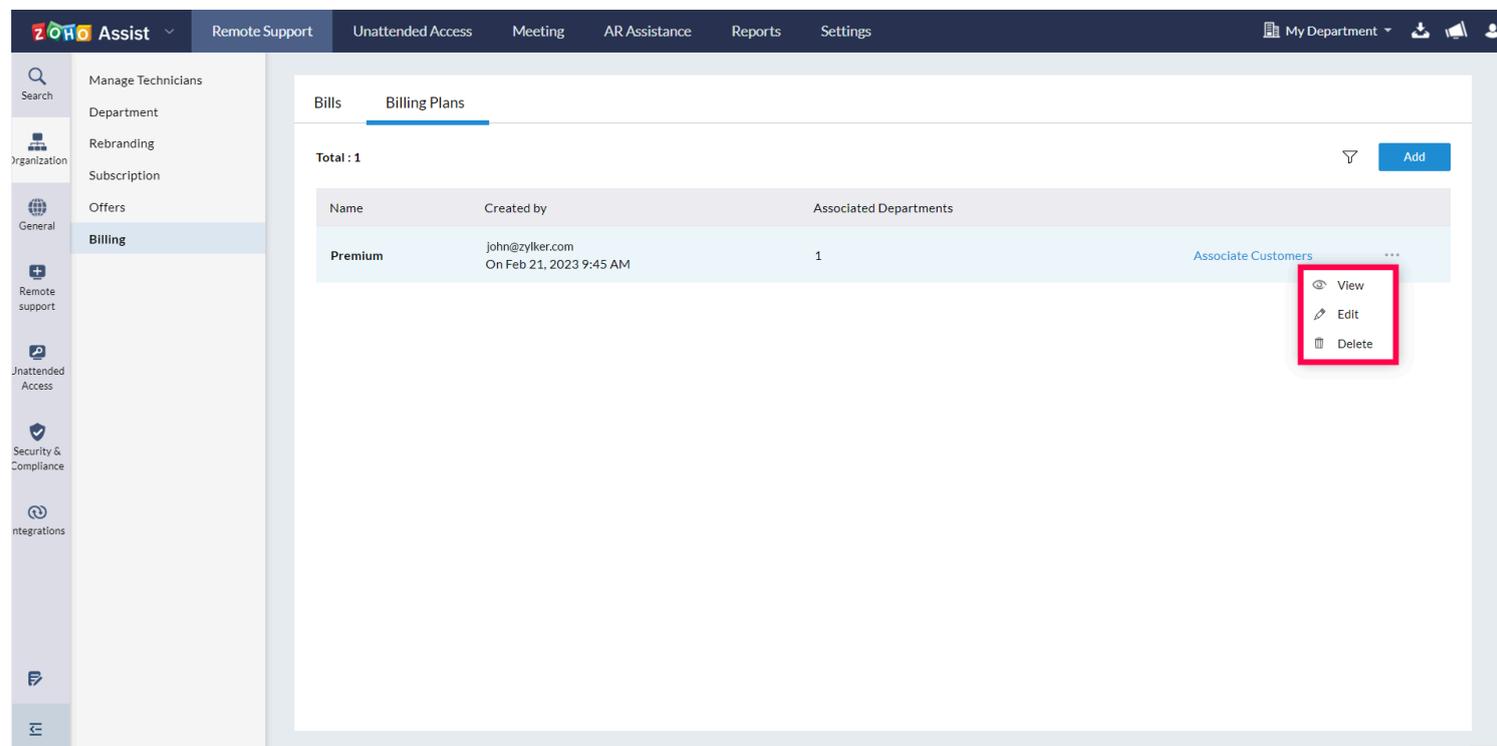
- Once a billing plan is created, it will be listed under Billing Plans. To associate, click **Associate Customers**.



- 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.



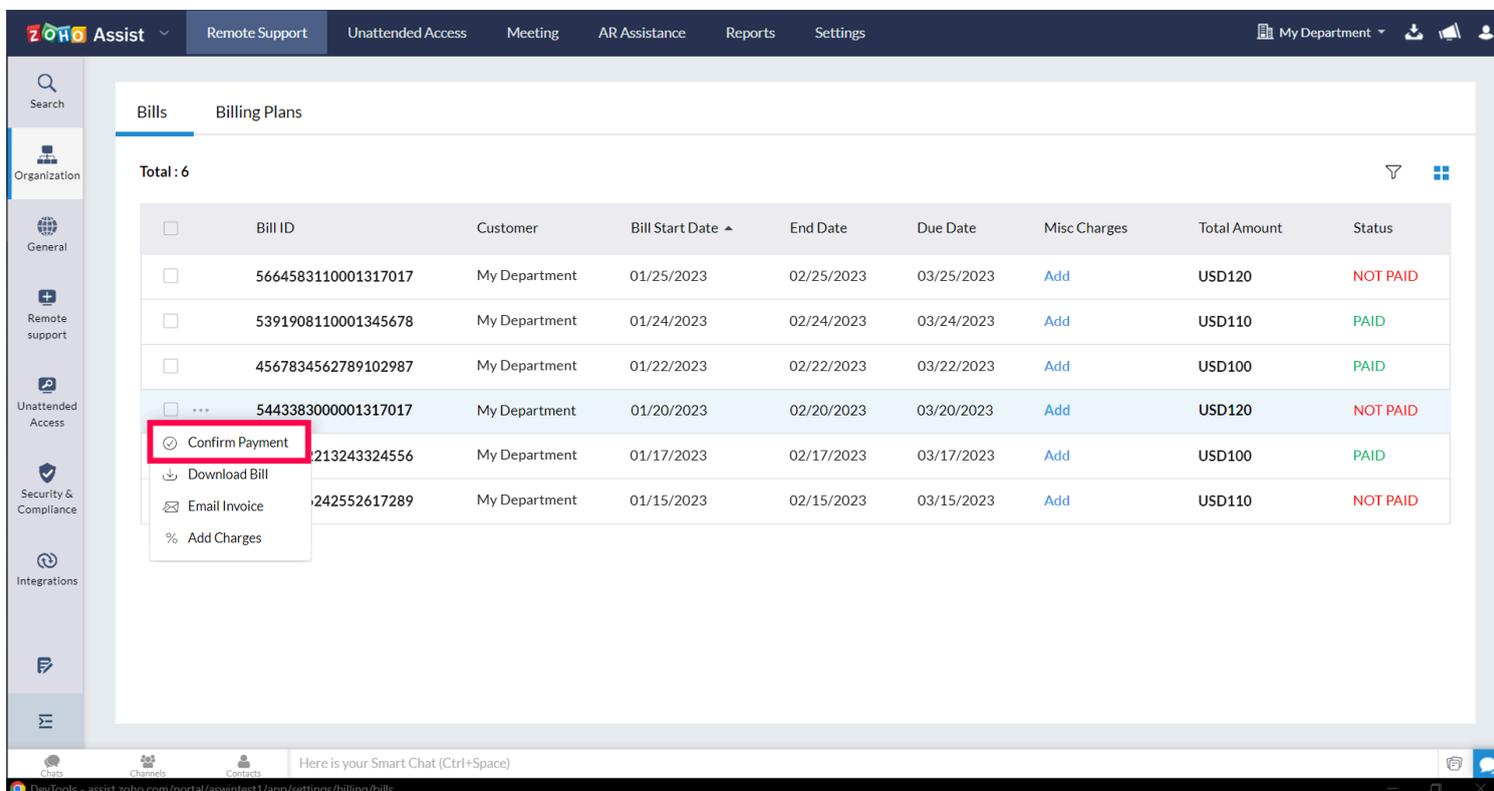
### ***Manage invoices***

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

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

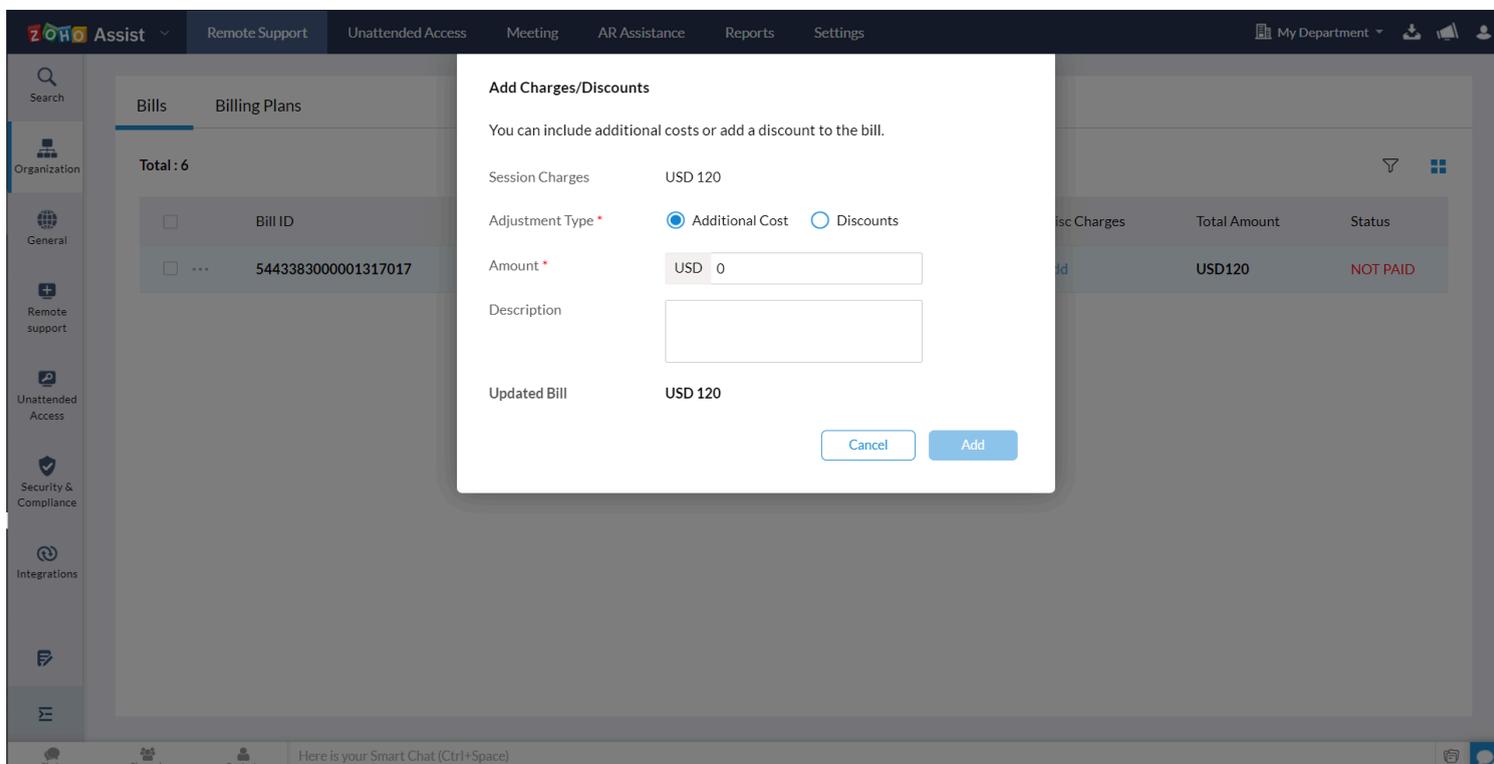
### ***To change the payment status***

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**.



## 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.



## 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**.

The screenshot shows the Zoho Assist Billing interface. The top navigation bar includes 'Zoho Assist', 'Remote Support', 'Unattended Access', 'Meeting', 'AR Assistance', 'Reports', and 'Settings'. The left sidebar contains navigation options: Search, Organization, General, Remote support, Unattended Access, Security & Compliance, and Integrations. The main content area is titled 'Bills' and 'Billing Plans', showing a 'Total: 6' count. A table lists bills with columns for Bill ID, Customer, Bill Start Date, End Date, Due Date, Misc Charges, Total Amount, and Status. A context menu is open over the bill with ID 213243324556, showing options: Confirm Payment, Download Bill, Email Invoice, and Add Charges. The 'Download Bill' and 'Email Invoice' options are highlighted with a red box.

Bill ID	Customer	Bill Start Date	End Date	Due Date	Misc Charges	Total Amount	Status
5664583110001317017	My Department	01/25/2023	02/25/2023	03/25/2023	Add	USD120	NOT PAID
5391908110001345678	My Department	01/24/2023	02/24/2023	03/24/2023	Add	USD110	PAID
4567834562789102987	My Department	01/22/2023	02/22/2023	03/22/2023	Add	USD100	PAID
544338300001317017	My Department	01/20/2023	02/20/2023	03/20/2023	Add	USD120	NOT PAID
213243324556	My Department	01/17/2023	02/17/2023	03/17/2023	Add	USD100	PAID
242552617289	My Department	01/15/2023	02/15/2023	03/15/2023	Add	USD110	NOT PAID