Remote billing in Zoho Assist

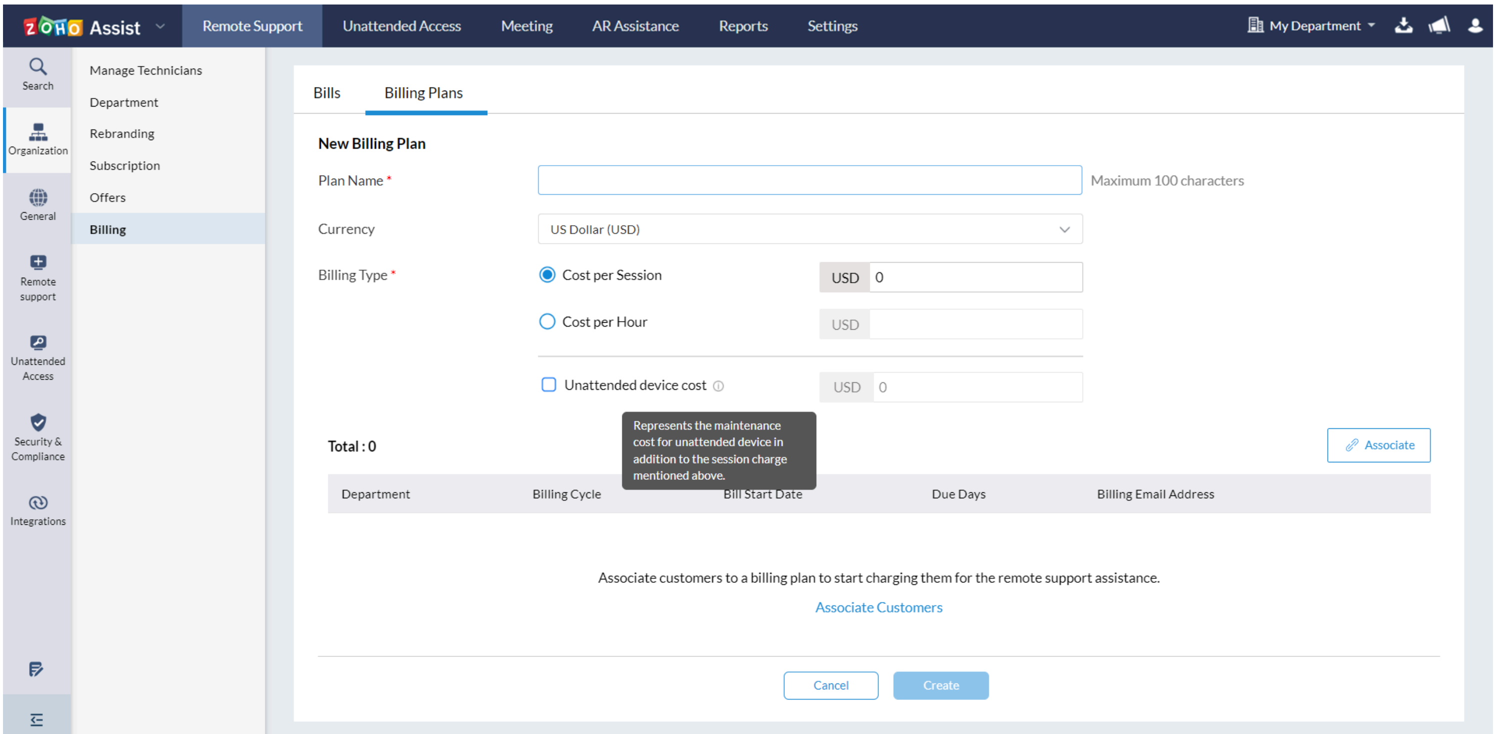
The Billing feature manages periodic customer billing for any remote service a support technicians has provided. This feature allows organization to track and compute bills based on both session count and session hours. For hassle-free automatic billing:

- 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:

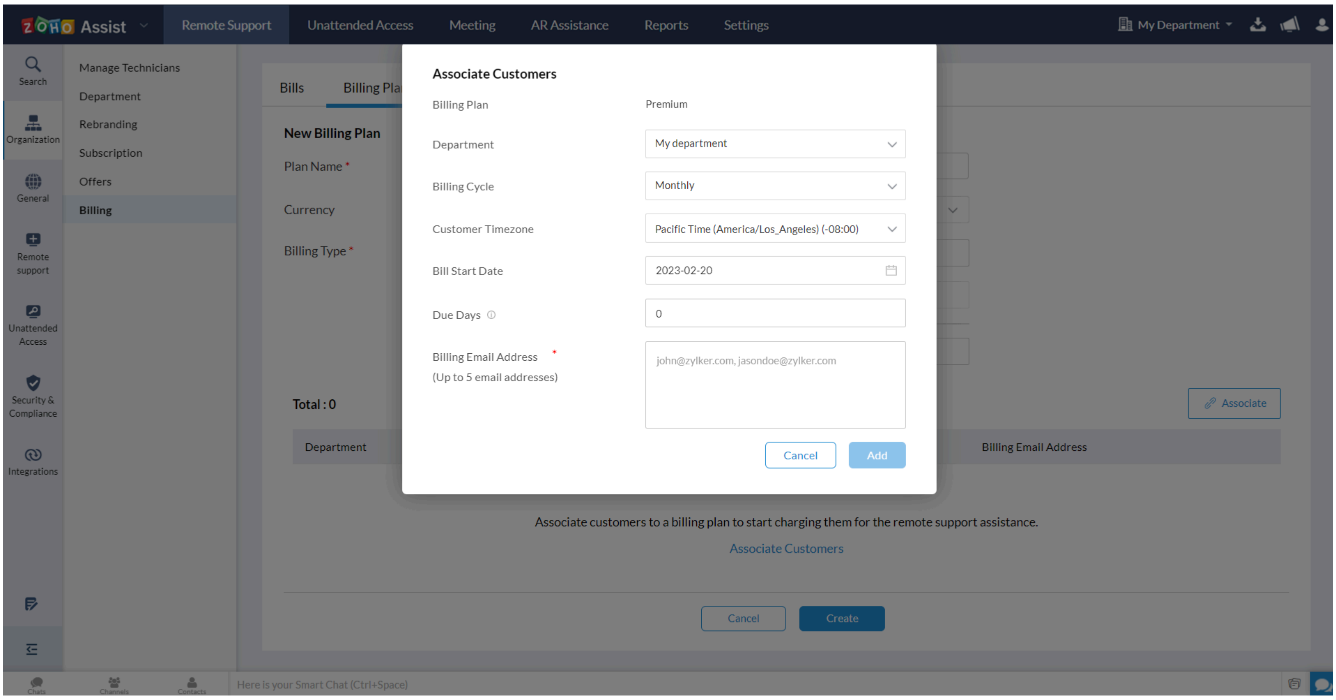
1. Log in to [Zoho Assist](https://assist.zoho.com) using your credentials.
2. Navigate to **Settings**> **Organization**> **Billing**> **Billing Plans** and click **Get Started.**
3. Enter the Plan name and currency, and choose the billing type. The billing type defines the cost per session, cost per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



To associate customers

To associate now

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

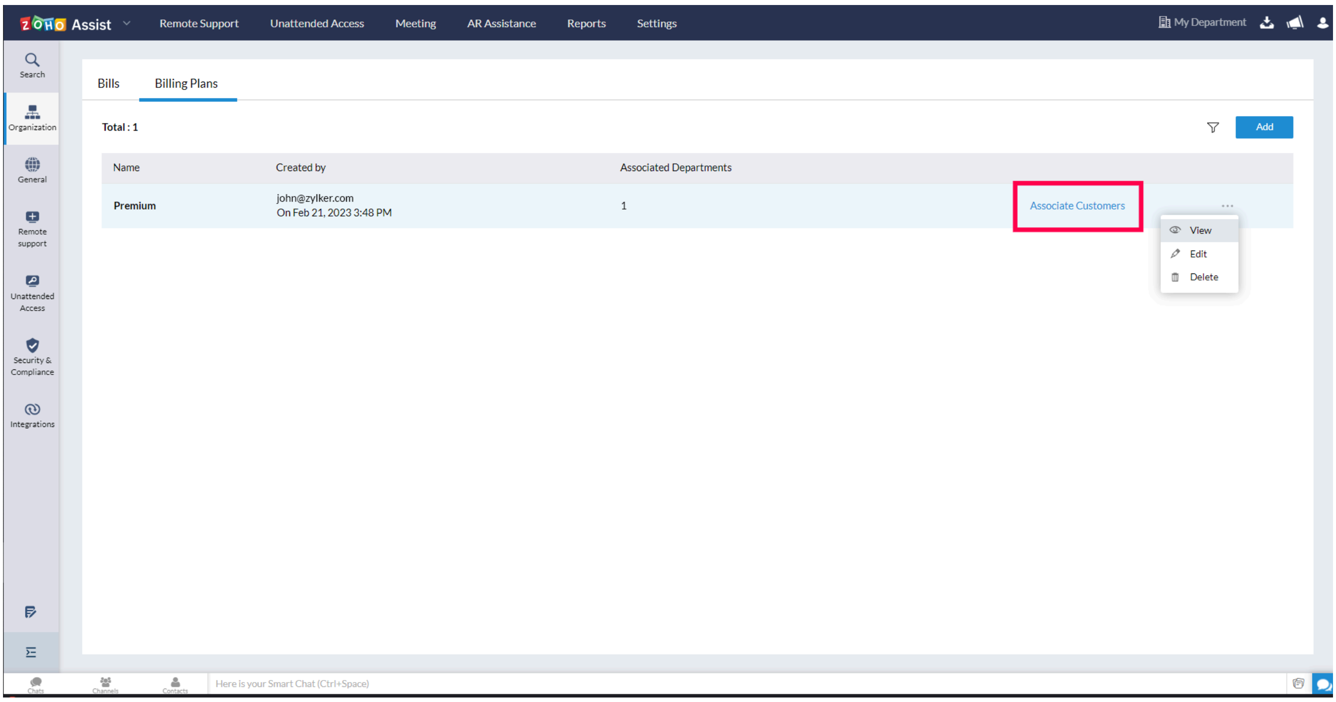


b. Choose **Department**, **Billing Cycle**, **Bill Start Date**, and enter due days and the billing address for the customer. Click **Add**.

c. Click **Create.**

To associate later

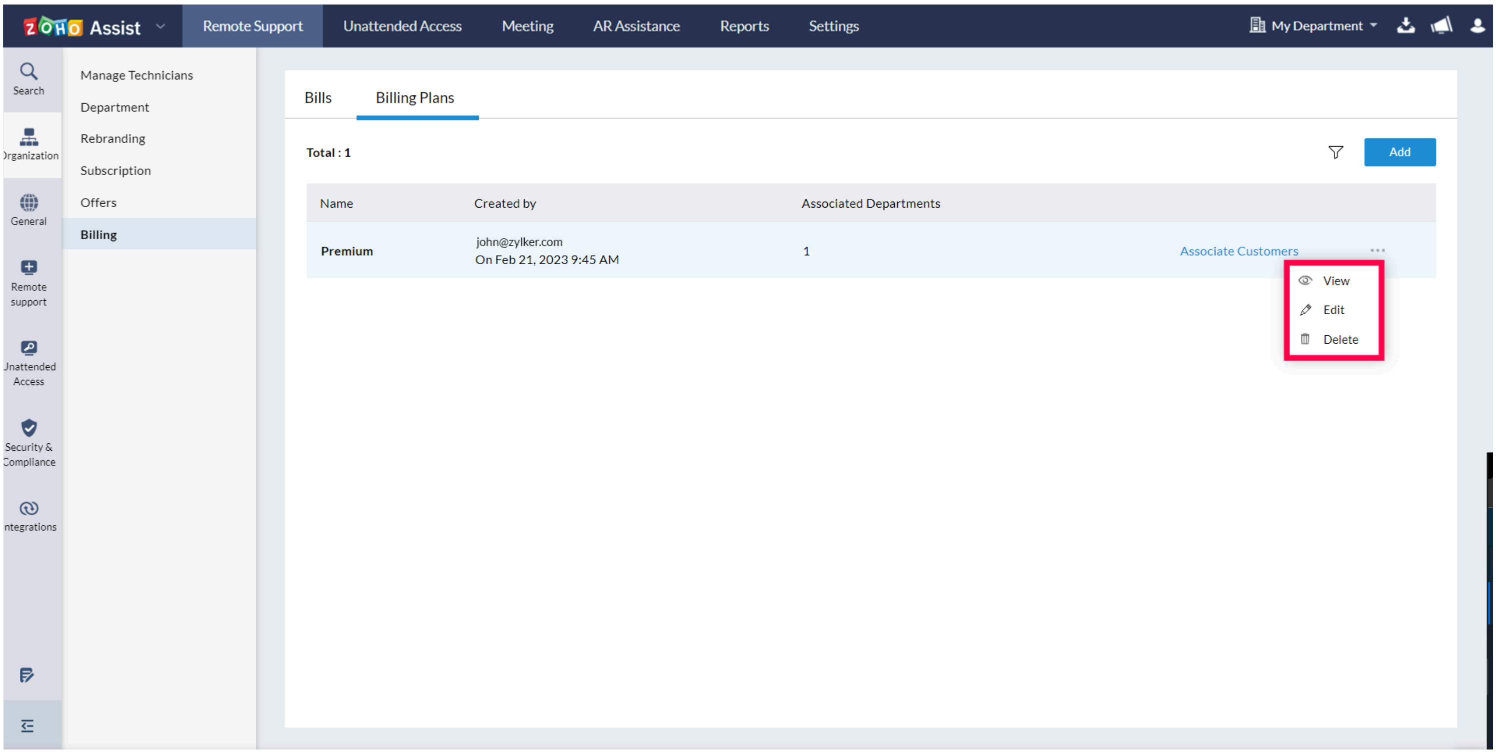
a. Once a billing plan is created, it will be listed under Billing Plans. To associate, click **Associate Customers**.



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.



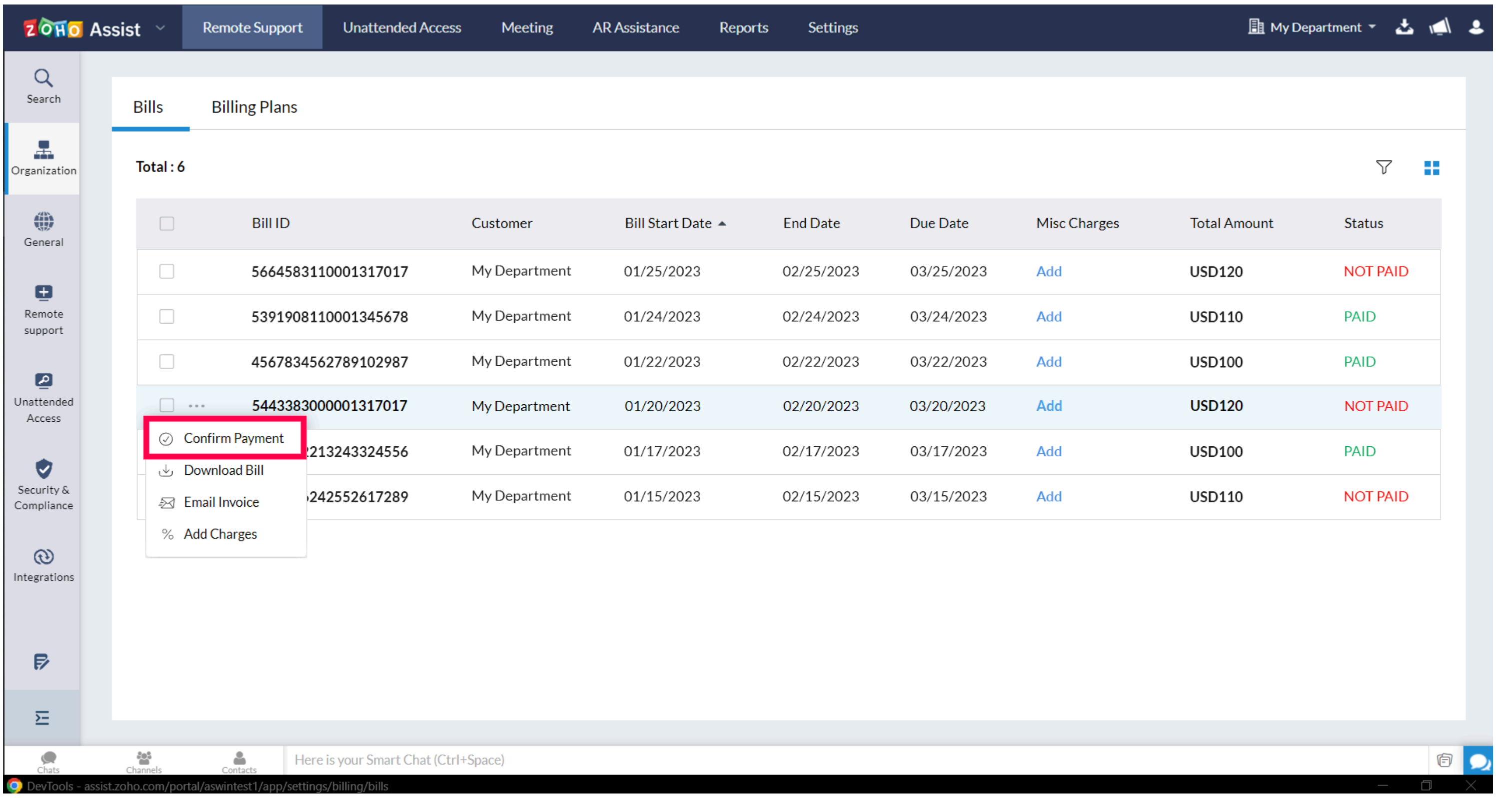
Manage invoices

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

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

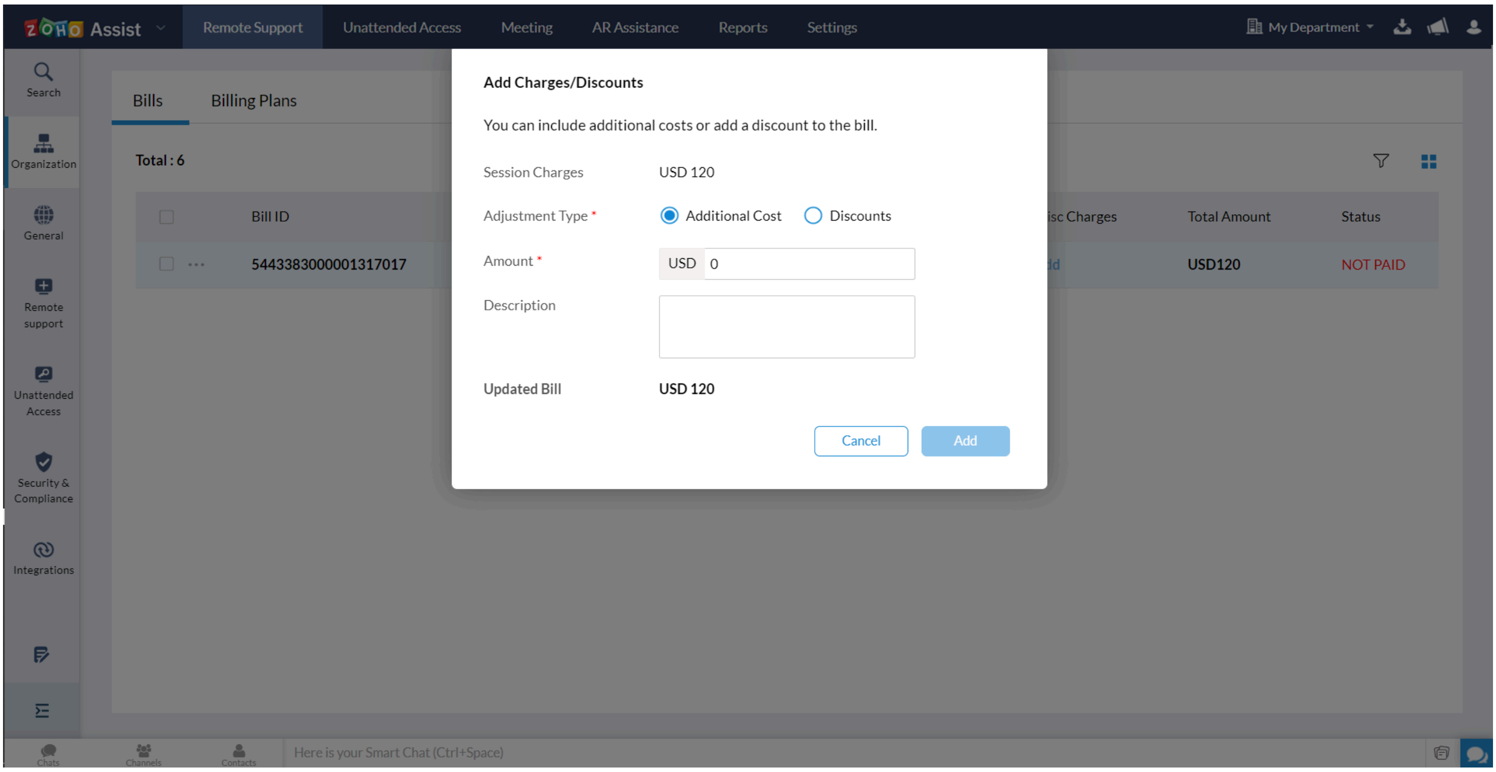
To change the payment status

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**.



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.**