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Genesys Skills Management Automated Install and Upgrade Guide

Salesforce Billing Configuration

4/10/2025

Salesforce Billing Configuration

Follow the procedures below to configure Salesforce billing information from Skills Management.

1. Create **Tenant billing information** from **Tenant Management** page.
2. **Configure Salesforce billing server** details from **Global Settings** page.
3. **Enable Salesforce billing process** from **Global Events** page.

Configuring Tenant Billing Details

When you create a Tenant, you can configure the billing details for the Tenant using **Tenant Management** page. This configuration automatically uploads the billing information of the tenant into Salesforce when the **Salesforce billing process** runs.

To configure Tenant billing details,

1. Login to Skills Management as a Landlord or Tenant Admin.
2. Navigate to **System > Tenant Management**.
3. Click **Edit** for the Tenant that you want to specify the billing details.
For new tenants, you can specify the billing details when you create the Tenant.

Tenant Details	
Tenant Name	Tenant 1
Primary contact	System Admin
Primary Contact Email	SA@email.com
Secondary Contact	
Secondary Contact Email	
Billable	<input checked="" type="checkbox"/>
External Id	
Source Id	
Tier 1 Account Id	
Tier 2 Account Id	
Next	

4. Select the **Billable** check box.
5. Enter values for the following fields:
 - Tier1 Account Id
 - Tier2 AccountId
 - Tier3 Account Id

- External Id
- Source Id

Note: If you have an on premise installation, leave the above fields blank. If you are a cloud customer, enter the account details provided by the Genesys finance team.

6. Click **Next** to save the billing information.