

GENESYS

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Genesys Skills Management Automated Install and Upgrade Guide

Salesforce Billing Configuration

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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.

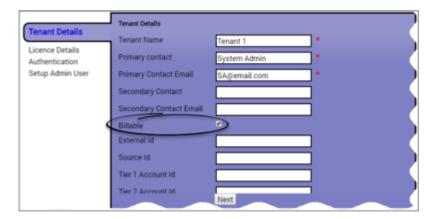
Configuring Tenant Billing Details

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.



- 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.