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Genesys Skills Management Automated Install and Upgrade Guide

PureConnect Billing Configuration

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PureConnect Billing Configuration

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

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

Important

You can also configure the PureConnect billing information through the relevant Tenant APIs. For more information on these APIs, see the Swagger API documentation help setup for your organization.

Configuring Tenant Billing details

When you create a Tenant, you can configure the billing details for the Tenant using the **Tenant Management** page. This configuration automatically uploads the billing information of the tenant to an Amazon Web Services (AWS) S3 bucket when the **PureConnect billing process** runs.

To configure Tenant billing details,

1. Login to Skills Management as a Landlord or Tenant Administrator.
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.

The screenshot shows the 'Tenant Details' configuration form. On the left is a sidebar with links: 'Tenant Details' (selected), 'Licence Details', 'Authentication', and 'Setup Admin User'. The main form area contains the following fields:

- Tenant Name: Docs
- Primary contact: Documentation
- Primary Contact Email: docs@genesys.com
- Secondary Contact: (empty)
- Secondary Contact Email: (empty)
- Billable: A dropdown menu with 'None' selected. The dropdown is open, showing 'None', 'Salesforce', and 'PureConnect' (which is circled).
- External ID: (empty)
- Source ID: (empty)
- Tier 1 Account ID: (empty)
- Tier 2 Account ID: (empty)

A 'Next' button is located at the bottom right of the form.

4. On the **Tenant Details** tab, select **PureConnect** from the **Billable** drop down.

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.