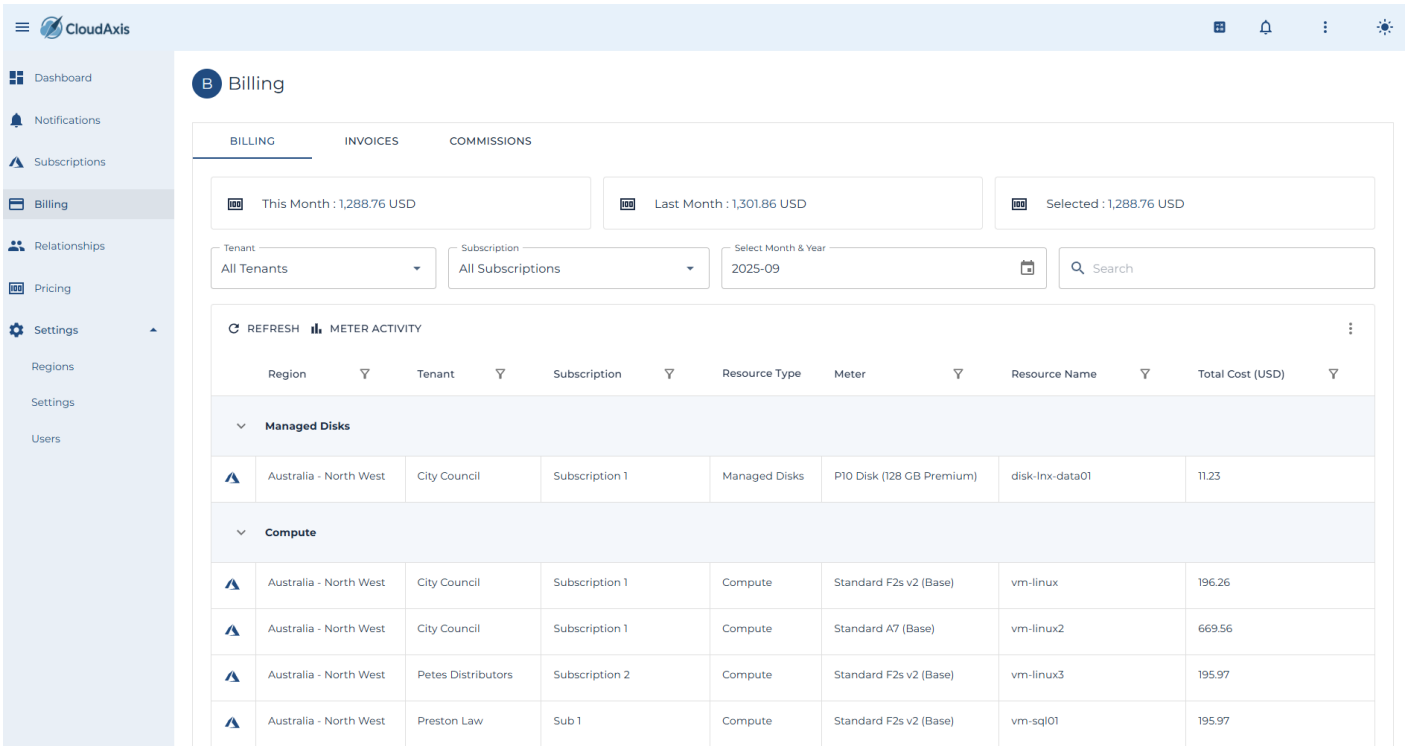
Billing Management

Purpose

Manage invoicing and commission processing in the CMS.
Invoices capture tenant consumption and apply pricing rules.
Commissions remunerate partners and distributors based on consumption.



Permission Level

Platform Administrator
Distributor Administrator (limited to own scope)
Partner Administrator (limited to own scope)

Generate Invoices

Purpose
Create invoices for a billing period.

Steps

1. Go to Administration → Billing → Invoices.
2. Select **Generate**.
3. Choose Billing Period (e.g. month).

4. Select Tenant(s) or run for all.
5. Confirm generation.

View Invoice

Purpose
Review invoice details before issuing to tenants.

Steps

1. Go to Administration → Billing → Invoices.
2. Select the invoice.
3. Review consumption, pricing, discounts, and totals.
4. Verify currency and payment terms.

Issue Invoice

Purpose
Move invoice from preview to issued.

Steps

1. Go to Administration → Billing → Invoices.
2. Open the preview invoice.
3. Select **Issue**.
4. Confirm.

Email Invoice

Purpose
Send an issued invoice to tenant billing contacts.

Steps

1. Go to Administration → Billing → Invoices.
2. Select the invoice.
3. Choose **Email Invoice**.
4. Confirm.

Store Invoice in Azure Stack

Purpose
Upload invoices to configured Azure Stack storage.

Steps

1. Ensure “Store Invoices in Azure Storage” is enabled under System Settings → Invoices.
2. Generate or Issue an invoice.
3. Verify invoice appears in the storage account.

Delete an Invoice

Purpose
Remove an invoice (typically in preview status).

Steps

1. Go to Administration → Billing → Invoices.
2. Select the invoice.
3. Choose **Delete**.
4. Confirm.

Commission Management

Purpose

Calculate and review commissions for partners and distributors.

Configure Commission Rates

Purpose
Set commission tiers based on consumption.

Steps

1. Go to Administration → Billing → Commissions → Rates.
2. Select Distributor or Partner.
3. Add one or more Tiers: From Amount, To Amount, Percentage.
4. Save.

Generate Commission Summary

Purpose
Produce commission calculations for a billing period.

Steps

1. Go to Administration → Billing → Commissions.
2. Select **Generate Summary**.
3. Choose Period (month or year).
4. Confirm.

View Commission Summary

Purpose
Review commission results for a distributor or partner.

Steps

1. Go to Administration → Billing → Commissions.
2. Select the entity.
3. Review calculated totals and tier application.

Export Commission Data

Purpose
Download commission summaries for financial reporting.

Steps

1. Go to Administration → Billing → Commissions.
2. Select **Export**.
3. Choose format (CSV, Excel, etc.).
4. Confirm.

Revision #1
Created 21 September 2025 13:04:21 by AutoBot
Updated 21 September 2025 13:06:23 by AutoBot