Billing Setup

Billing · https://staging.proclock.com/help/kb/managers/billing/billing-setup/

Overview

The **Billing Setup** page in the ProClock Manager admin portal allows administrators to manage billing information and subscription details for their organization. This page is essential for ensuring accurate invoicing, maintaining an active subscription, and managing payment methods. The Billing Setup page is divided into two main sections, accessible via tabs at the top:

- **Billing Info**
- **Subscription**

This guide provides step-by-step instructions for completing each section, answers to common questions, and troubleshooting tips to help you manage your ProClock billing efficiently.

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1. Billing Info Tab

The **Billing Info** tab is the first step in setting up your billing. It is divided into two sections:

- **Billing Contact**
- **Billing Address**

You must complete all required fields in this tab before you can proceed to the Subscription tab.

Billing Contact

Enter the following information for the primary billing contact:

- **First Name** (required)
- **Last Name** (required)
- **Email** (required)

- **Company Name** (required)
- **Phone** (required)

Tip: Ensure the email address is valid and monitored, as all billing communications will be sent here.

Billing Address

Provide your organization's billing address:

- **Address** (required)
- **Address 2** (optional)
- **City** (required)
- **State** (required)
- **Zip Code** (required)

Saving Your Information

After entering all required information, click the **green disk icon** in the upper-right corner to save your changes.You must save your billing info before you can access the Subscription tab.

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2. Subscription Tab

The **Subscription** tab allows you to view plan options, manage your payment method, and monitor your subscription status.

Plan Information

On the **left side** of the Subscription tab, you will see details and pricing for the available ProClock plans.

Payment Information

On the **right side**, enter your payment details:

- **Name** (as it appears on the credit card)
- **Credit Card Number**

Note: Ensure your payment information is accurate to avoid interruptions in service.

Subscription Status

Directly above the payment entry fields, you will see your current subscription status:

- **Your subscription is active!** (green icon)
- **Your subscription is no longer active.** (red icon)
- **Cancelled: {date}** (if the subscription was previously active)

If you wish to cancel your subscription, click the **CANCEL SUBSCRIPTION** link in red text.

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3. Understanding ProClock Billing

- **ProClock is billed as a monthly subscription.**
- Invoices are generated at the end of each billing cycle, based on the number of **active employees** during that cycle.
- **Active employees** are those assigned a Pay Rate of: Weekly, Bi-Weekly, Semi-Monthly, or Monthly.
- **Non-active employees** are those assigned a Pay Rate of: Terminated or Inactive.

Tip: To avoid charges for seasonal or temporary employees, set their Pay Rate to **Inactive** in their profile.

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4. Frequently Asked Questions (FAQs)

Q: How do I update my billing contact or address?

A: Navigate to the Billing Info tab, update the necessary fields, and click the green disk icon to save.

Q: What happens if my payment fails?

A: If your payment fails, your subscription status will change to “no longer active.” Update your payment information and save to restore service.

Q: How do I avoid being billed for inactive or seasonal employees?

A: Change their Pay Rate to “Inactive” in their employee profile before the billing cycle ends.

Q: Can I cancel my subscription at any time?

A: Yes, click the CANCEL SUBSCRIPTION link in the Subscription tab. Your status will update to “Cancelled: {date}.”

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5. Troubleshooting

Issue: Unable to Save Billing Info

- **Step 1:** Ensure all required fields are filled out (marked as required above).
- **Step 2:** Check for typos or invalid email/phone formats.
- **Step 3:** Click the green disk icon to save. If the icon is greyed out, review the form for missing information.

Issue: Payment Not Processing

- **Step 1:** Verify that the credit card number and name are entered correctly.
- **Step 2:** Ensure the card is not expired and has sufficient funds.
- **Step 3:** Try a different card if the issue persists.

Issue: Subscription Status Shows “No Longer Active”

- **Step 1:** Check your payment information for accuracy.
- **Step 2:** Update and save your payment details.
- **Step 3:** If the issue continues, contact your card provider or try another payment method.

Issue: Being Billed for Inactive Employees

- **Step 1:** Review employee profiles and ensure Pay Rate is set to “Inactive” for all non-active employees before the billing cycle ends.
- **Step 2:** Save any changes made to employee profiles.