



An end-to-end billing solution

The business landscape is marked by rapid changes and constant evolution.

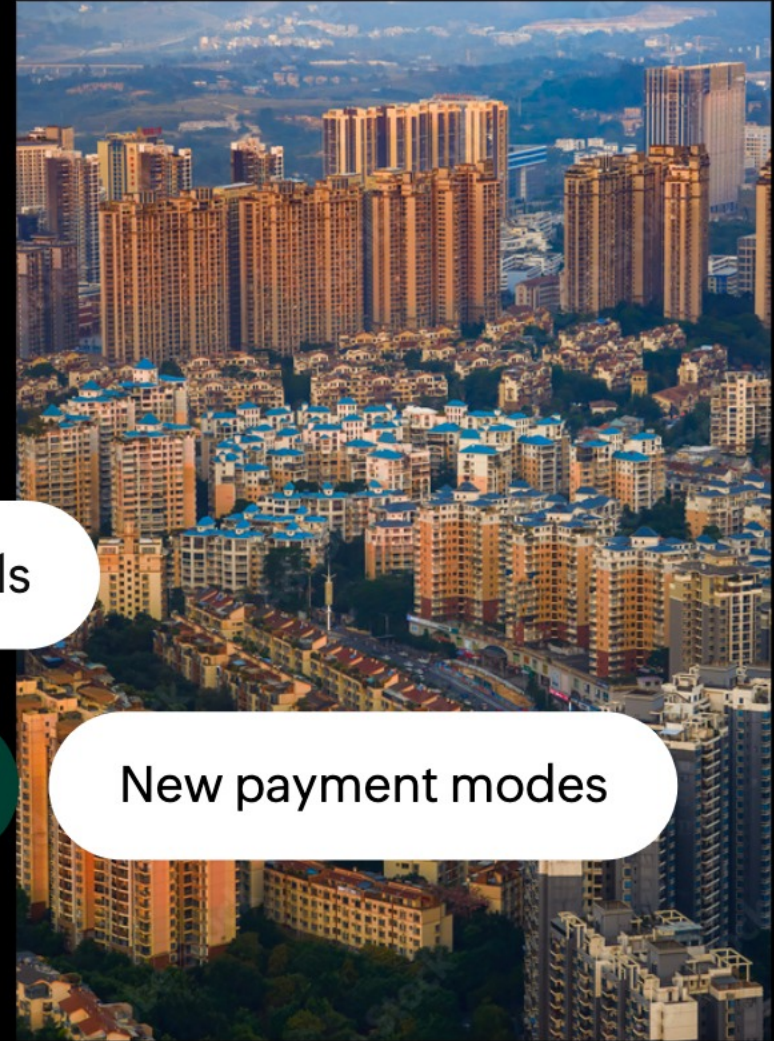
Technology advancements

New pricing models

Customer preferences

Regulatory changes

New payment modes



Businesses need to be agile and responsive to remain competitive in this dynamic environment.



Businesses need to be agile and responsive to remain competitive in this dynamic environment.

Billing processes play a crucial role in adapting to these changes effectively.

**Growing businesses often
navigate through different
billing complexities.**

Lack of operational rigour

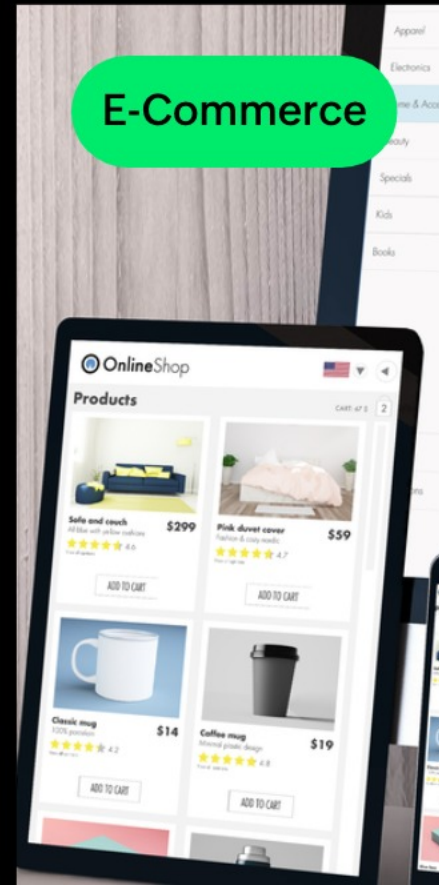
Lack of business insights

Failed payments

Separate invoicing processes

Unscalable billing infrastructure

Different **industries** adopt different billing processes.



**So, you need a comprehensive
solution that is agile and tailored to
your specific needs.**

Introducing

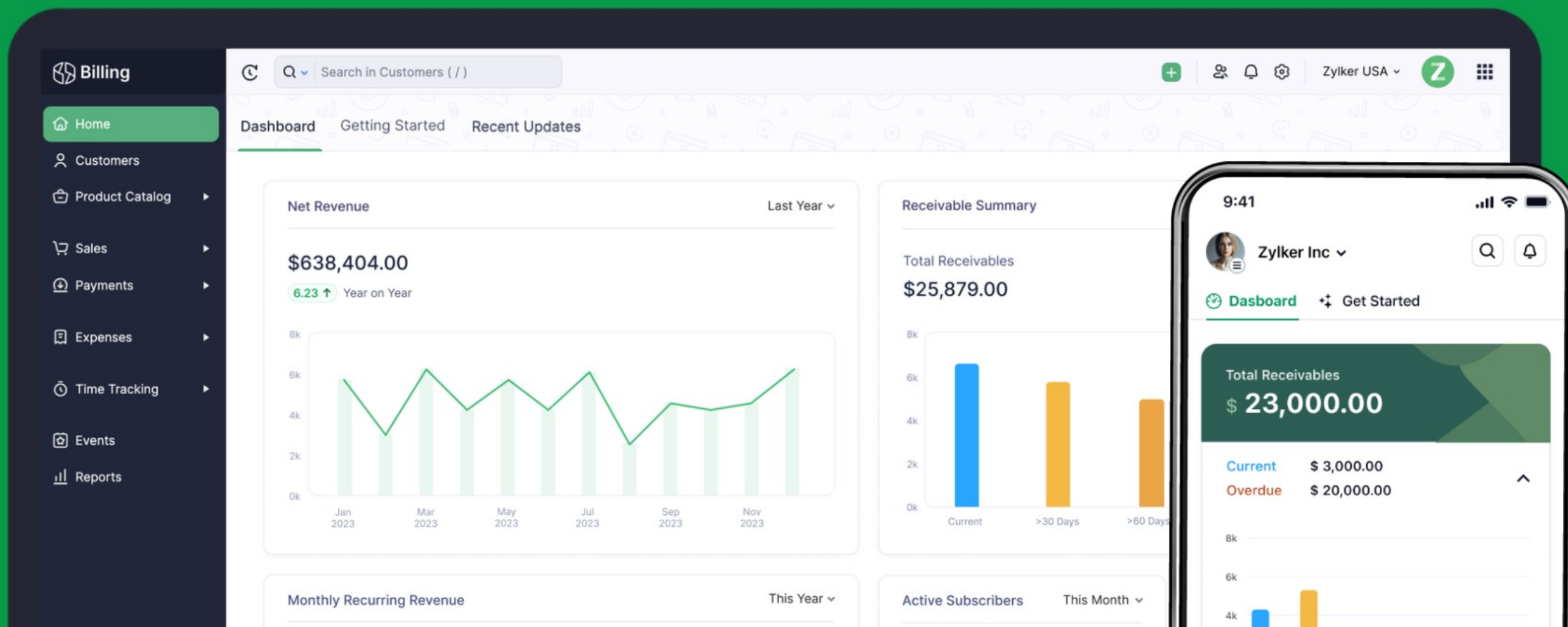


Zoho
Billing

**An end-to-end billing solution for small
and medium-sized businesses.**



Zoho Billing streamlines your entire billing process, making it more intuitive and efficient. It comes with powerful invoicing, billing management, lifecycle automation, and revenue recovery capabilities.



Core Capabilities

- 1. Easy product management**
- 2. Efficient billing management**
- 3. Convenient payment handling**
- 4. Customer lifecycle management**
- 5. Powerful business insights and analytics**
- 6. Marketplace and integrations**

Core Capabilities

1. Easy product management

2. Efficient billing management

3. Convenient payment handling

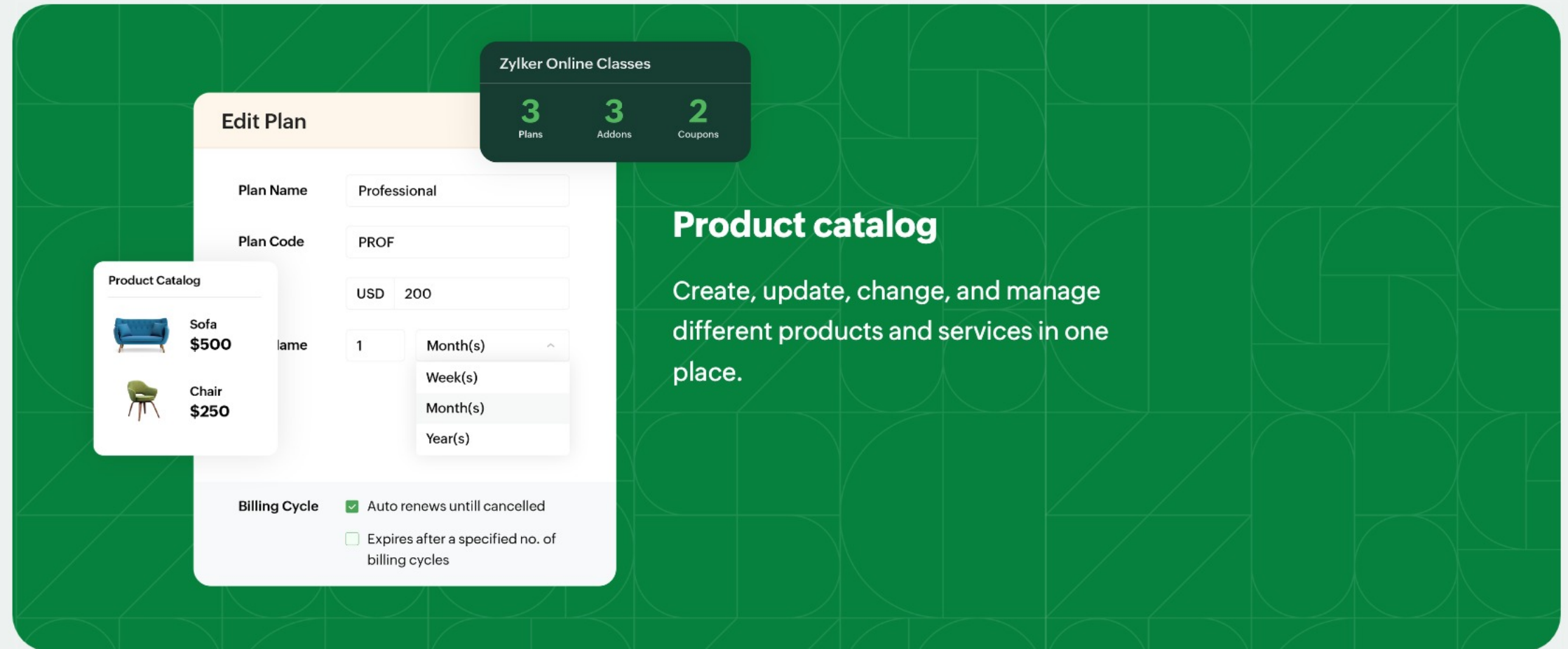
4. Customer lifecycle management

5. Powerful business insights and analytics

6. Marketplace and integrations

1.1. Easy product management

Define your product and service offerings and package them for your customers via subscriptions.



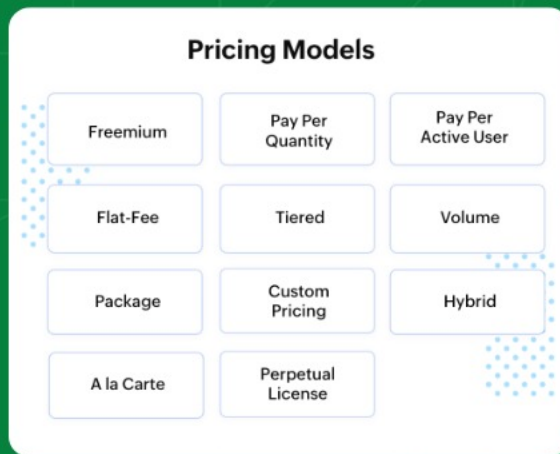
The screenshot displays the 'Zylker Online Classes' management interface. At the top, a dark green header shows 'Zylker Online Classes' with three statistics: 3 Plans, 3 Addons, and 2 Coupons. Below this is the 'Edit Plan' form, which includes fields for Plan Name (Professional), Plan Code (PROF), Price (USD 200), and a dropdown for the Billing Cycle (Month(s), Week(s), Month(s), Year(s)). A 'Product Catalog' overlay is visible on the left, showing two items: a Sofa for \$500 and a Chair for \$250. The 'Billing Cycle' section at the bottom has two options: 'Auto renews untill cancelled' (checked) and 'Expires after a specified no. of billing cycles' (unchecked).

Product catalog

Create, update, change, and manage different products and services in one place.

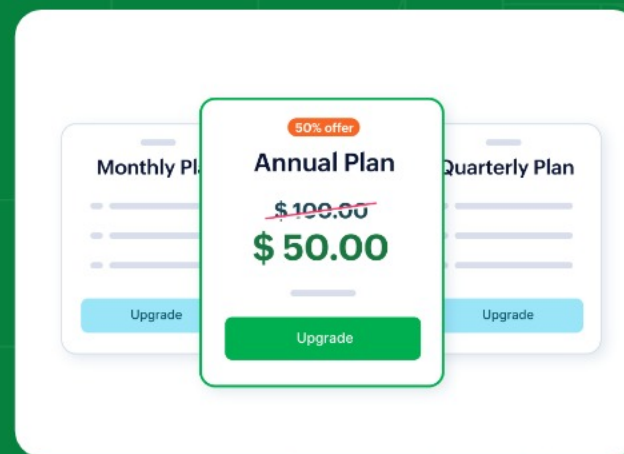
1.2. Multiple pricing models

Accelerate pricing experiments across the globe with wide-ranging pricing models.



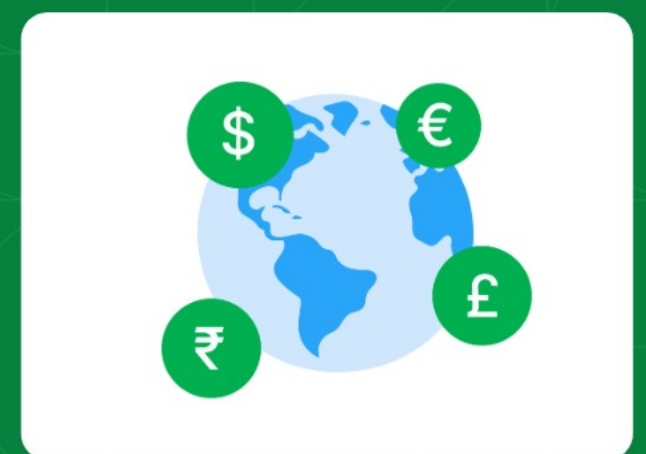
Pricing models

Gain control over the pricing of your products and services.



Offer incentives

Offer discounts, freemium plans, and trials.

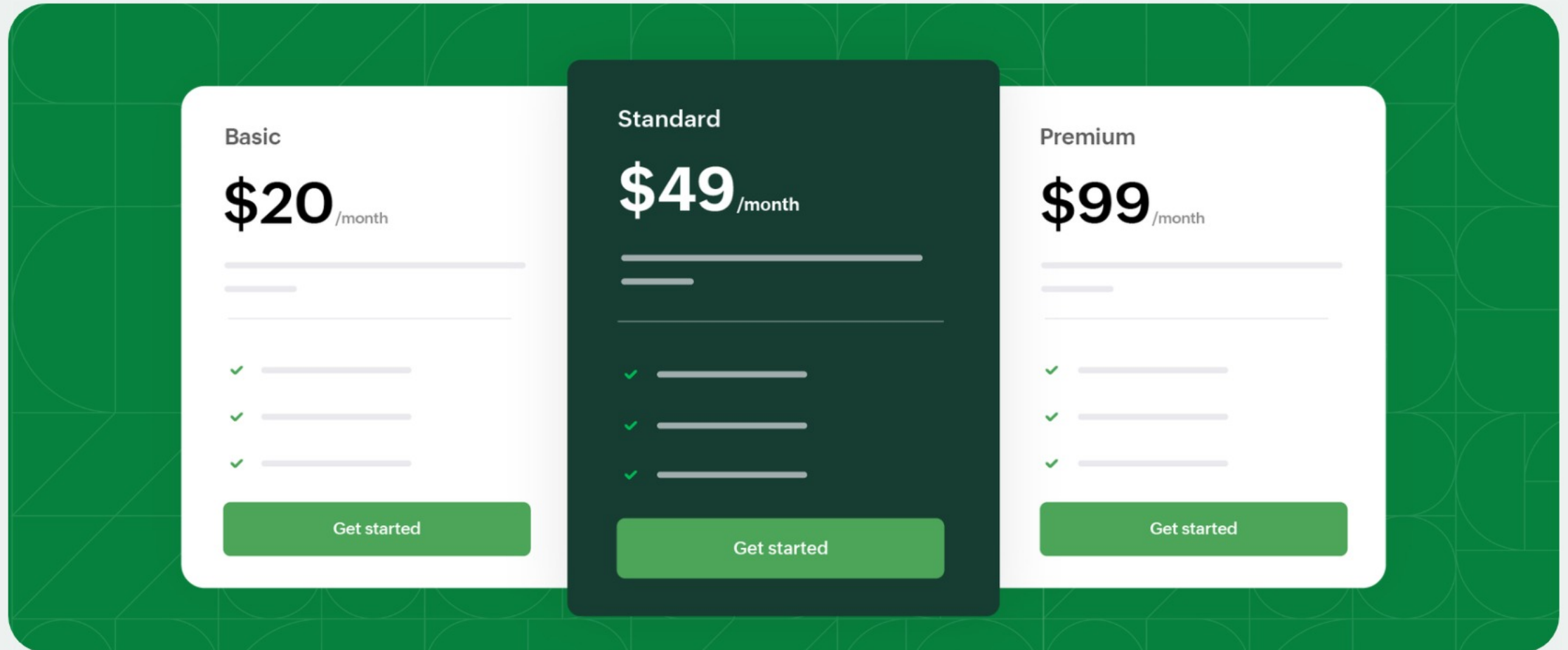


Multi-currency

Sell across borders to customers from different regions.

1.3. Varied pricing plans

Add and manage multiple pricing plans for your product or service.



1.4. Discount management

Create one-time, unlimited, or time-defined coupons to provide discounts and special offers to customers.

Zylker Furnishings

3 Plans 3 Addons 2 Coupons

Add Plan

Plan Name: Furniture Maintenance

Plan Code: MAIN

Currency: USD Amount: 25

Frequency: 6 Duration: Month(s)

Billing Cycle: ☒ Auto renews until cancelled
☐ Expires after a specified no. of

Product Catalog

- Sofa \$500
- Chair \$250

Core Capabilities

1. Easy product management

2. Efficient billing management

3. Convenient payment handling

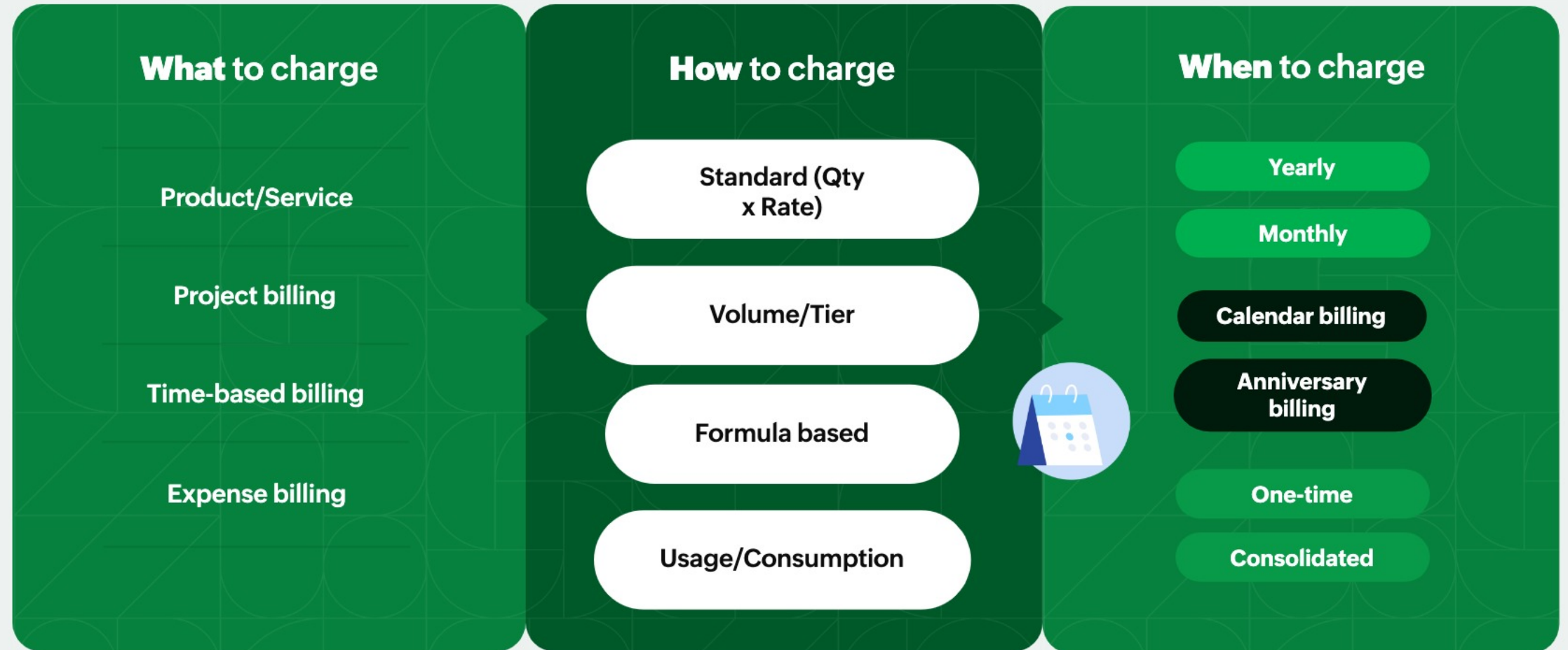
4. Customer lifecycle management

5. Powerful business insights and analytics

6. Marketplace and integrations

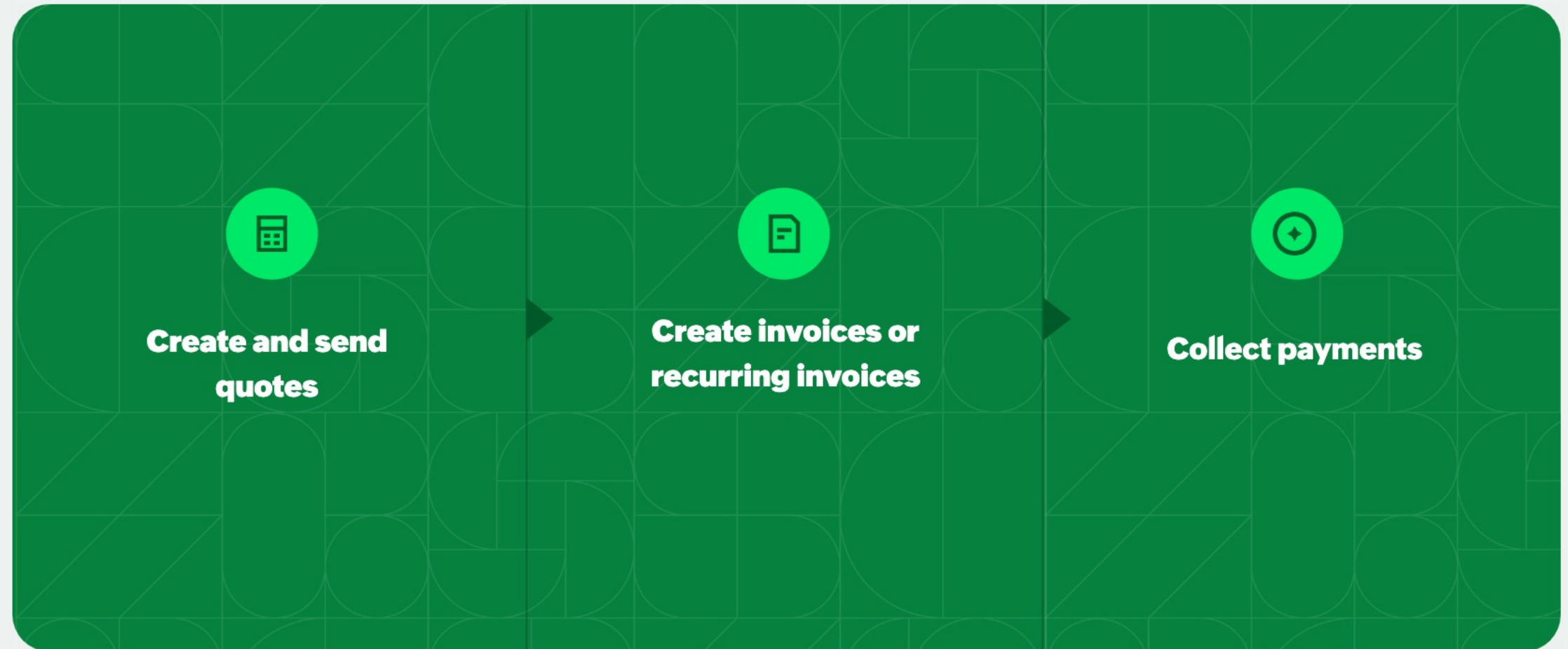
2.1. Efficient billing management

Manage billing operations with complete flexibility in monetizing offerings.



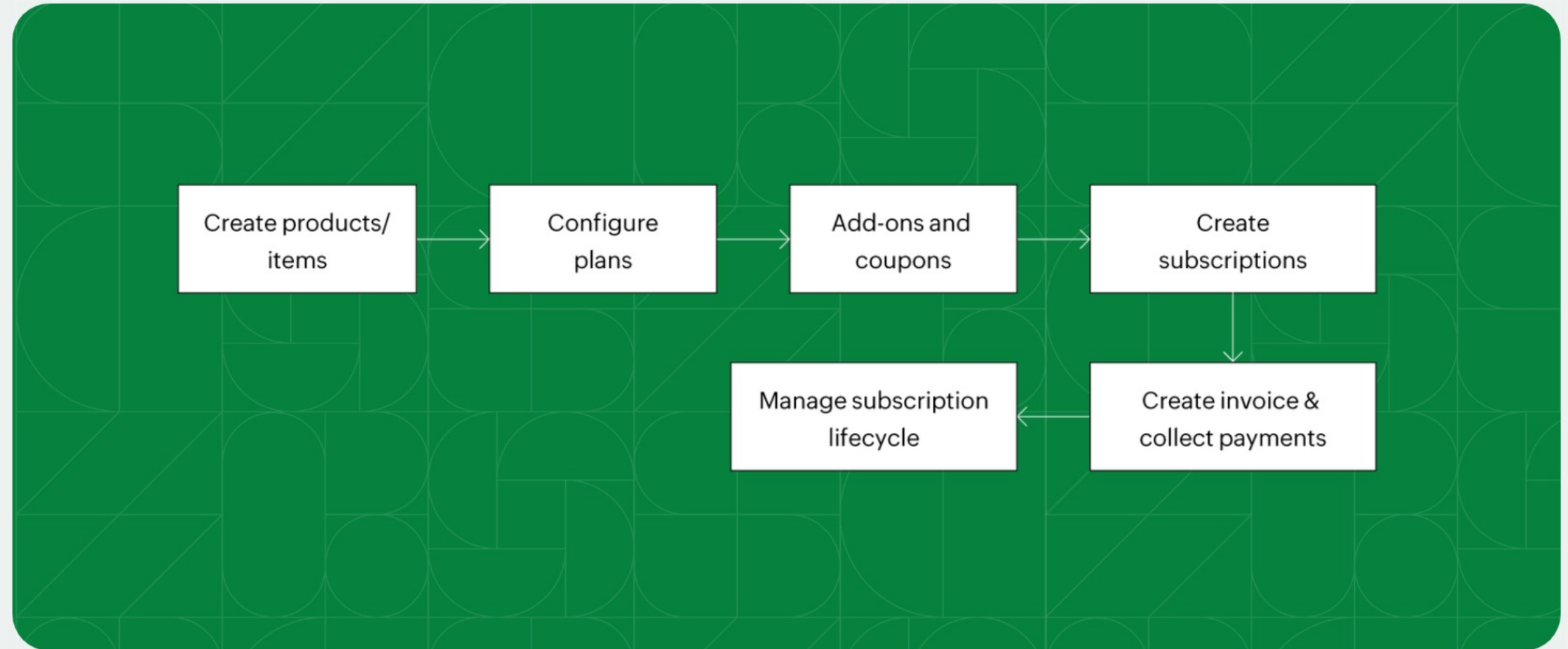
2.2. One-time and recurring billing

Generate professional invoices for one-time products or services. Set up automated recurring billing for subscription-based businesses.



2.3. Subscription billing

Regulate the process by any subscription change such as an upgrade, downgrade, renewal, suspension, and more.



2.3. Subscription billing

Automate proration and bill clients based on their prorated usage.

The screenshot displays a web interface for managing subscription plans. The main form is titled "Edit Plan" and contains the following fields:

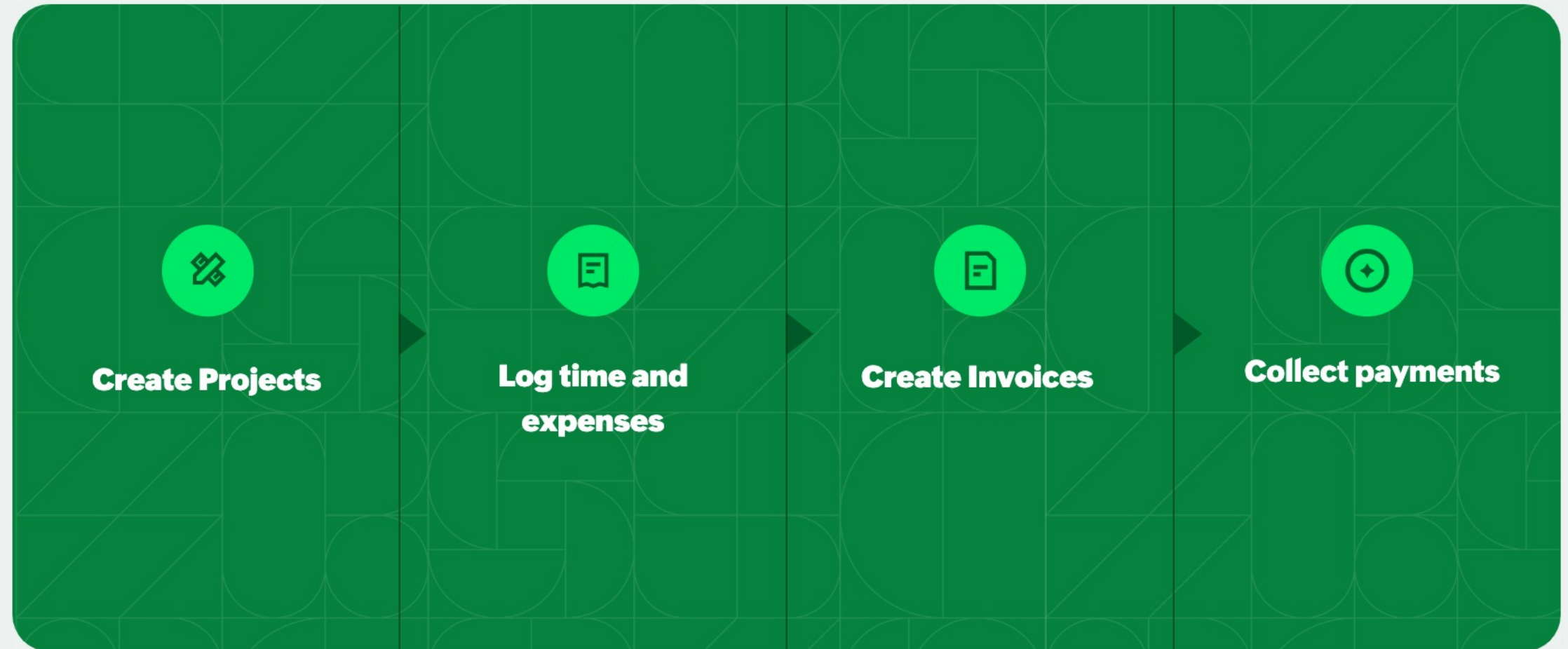
- Plan Name:** Professional
- Plan Code:** PROF
- Price:** USD 200
- Plan Name:** 1 (with a dropdown menu showing options: Week(s), Month(s) [highlighted], Year(s))
- Billing Cycle:** ☒ Auto renews untill cancelled, ☐ Expires after a specified no. of billing cycles

An overlay titled "Automatic Proration" is shown, detailing a plan upgrade scenario:

- SUBSCRIBED:** 1 APRIL for \$30/month plan. A progress bar shows the current date is 15 days into the month, with a "Credit \$15" box.
- UPGRADED:** 15 APRIL to \$60/month plan. A progress bar shows the remaining 15 days of the old plan, with a "\$30 for 15 days" label.
- Amount to Pay:** = \$30 - credits(\$15) = \$15.



2.4. Project billing

Invoice clients based on the work completed or milestones achieved in a specific project.



2.4. Project billing

Create and manage projects, track time, and bill customers accurately.

**Quote** 

12-03-2023 Approved

Zylker Dezigns
4606 Benson Park Drive
Rosedale,
Oklahoma 73086
U.S.A.


Bill To
Thelma O. Park
3781 Olen Thomas Drive
Wichita Falls,
TX 76301
U.S.A.

#	Item & Description	QTY	Rate	Amount
1	Brochure Design Brochure design single sided colour	1.00	300	300
2	Web Design Package (Template) - Basic Custom Theme for your business. Inclusive of 10 hours Marketing and Annual Training.	1.00	500	500
3	Print Ad Basic Color	1.00	80	80

INVOICE
INV-001654

Balance Due
\$62,540.00

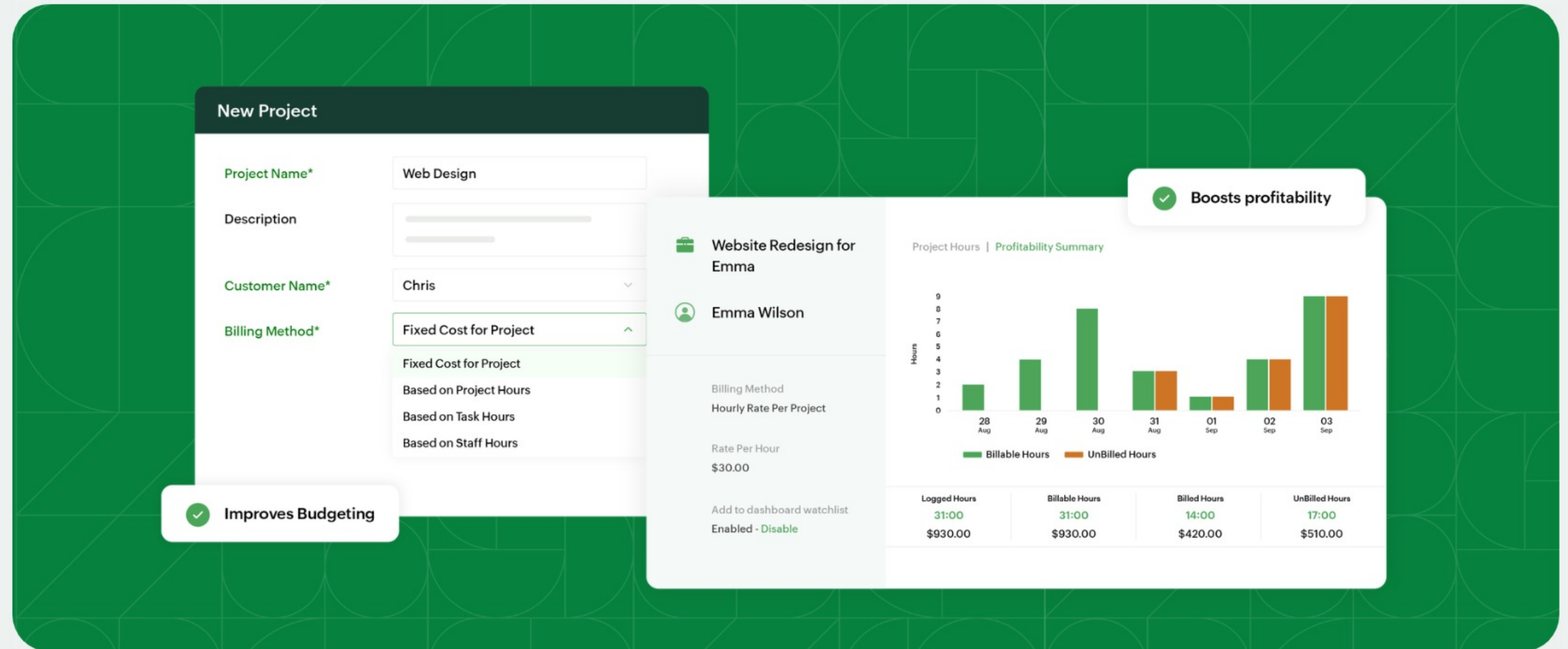
Projects

 **Log Time**
09:00

Track Expense
\$200

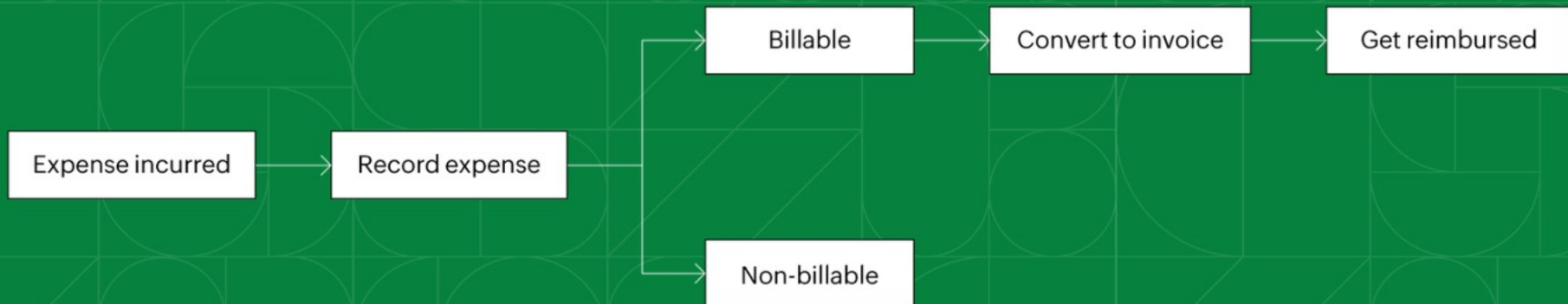
2.4. Project billing

Track time with ease and raise invoices for billable expenses.



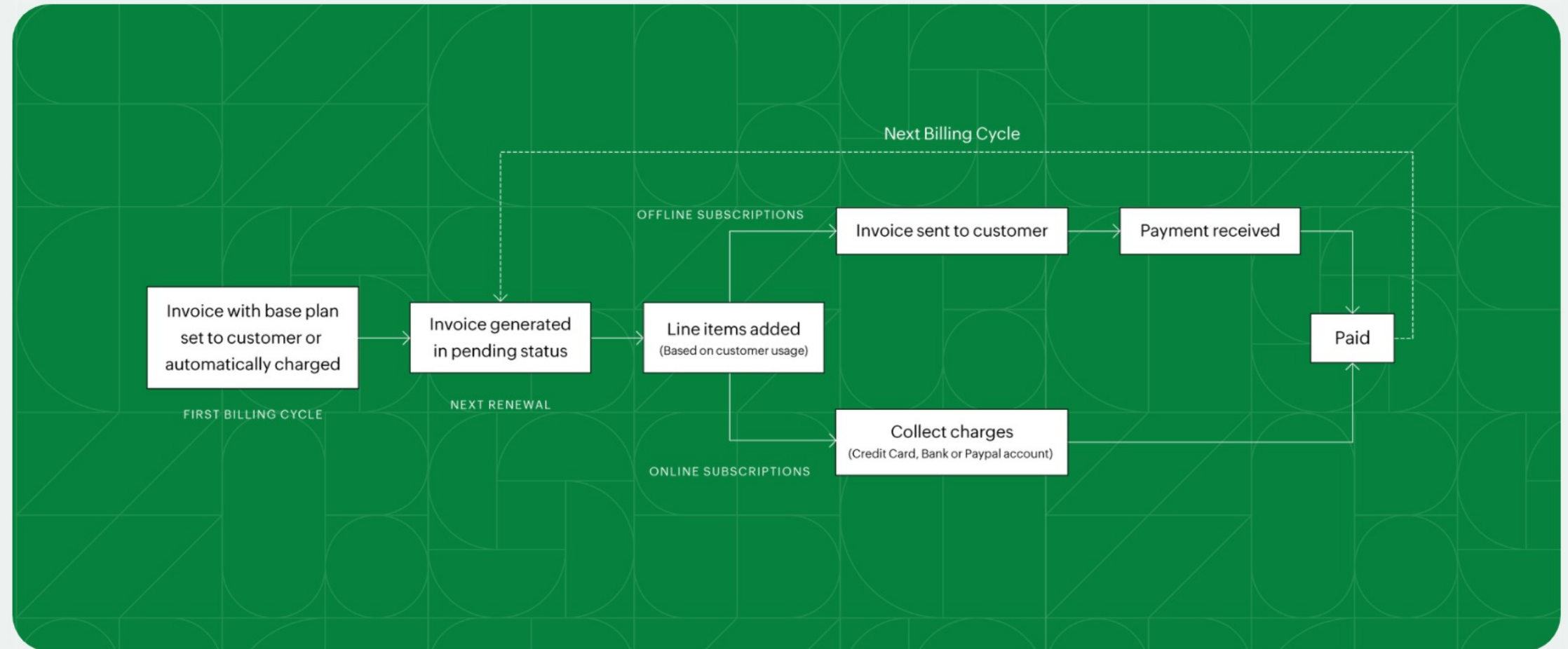
2.5. Expense billing

Categorize and track your reimbursable expenses and bill them to your clients.



2.6. Metered billing

Charge customers based on their actual usage of a product or service.



Core Capabilities

1. Easy product management

2. Efficient billing management

3. Convenient payment handling

4. Customer lifecycle management

5. Powerful business insights and analytics


6. Marketplace and integrations

3.1. Convenient payment handling

Offer customers a frictionless payment experience while empowering teams with insights to increase customer retention and cash flow.

Empower customers

YOUR CART




Classic Black Shoes


~~\$50.00~~
\$40.00

Apply




Frequently bought together



+



Add both to cart



Proceed to pay

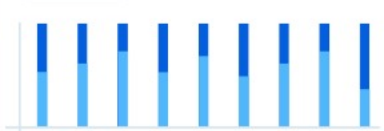
Empower systems

Retry ☒ Enabled


Number of Attempts Next Schedule


Configurable Payment Retry


Total Recovered





Empower teams



Manual reminders


Mail


Phone calls


Support


Sales


Finance

3.2. Payment gateways and modes

Accept payments from all over the world using 10+ different payment gateways. Offer payment flexibility with multiple options.

The image displays a payment interface for a company named 'Zylker'. The interface is divided into several sections:

- Order Details:** This section shows the 'PLAN' as 'Standard Plan' with a 'SERVICE' tag. It indicates the plan is 'Billed Every 1 month' and has a quantity of '1'. Below this, the 'SUB TOTAL' is shown with a 'Service tax (12.5%)'. The 'TOTAL AMOUNT' is also displayed.
- Payment information:** This section contains a card number field (masked with '****'), an expiration date field (showing '02/28'), and a CVV field (masked with '***').
- Payment Modes:** A modal window is open, showing various payment options: 'VISA RuPay', 'NetBanking', 'UPI', and 'Wallet'.
- PROCEED:** A large green button at the bottom right of the form.

Customers can pay with **credit cards, debit cards, online banking, and ACH.**

Stripe, Authorize.Net, WePay, PayPal, 2Checkout, PayTM, Razorpay

3.3. Payment reminders

Update customers about their subscription renewals and overdue invoices.

Manual Reminders

NAME	DESCRIPTION
------	-------------

Reminder For Overdue Invoices	You can send this reminder to your customers manually, from an overdue invoice's details page.
---	--

Reminder For Sent Invoices	You can send this reminder to your customers manually, from a sent (but not overdue) details page.
--	--

Reminders Based on Expected Payment Date

Payment Expected ⓘ	Remind me 3 day(s) After expected payment date	<input checked="" type="checkbox"/>	
------------------------------------	--	-------------------------------------	---

STATUS

ACTIONS

Reminders Based on Due Date

Reminder - 2	Remind me 1 day(s) Before due date	<input checked="" type="checkbox"/>	
------------------------------	------------------------------------	-------------------------------------	---

Reminder - 1	Remind me 2 day(s) Before due date	<input checked="" type="checkbox"/>	
------------------------------	------------------------------------	-------------------------------------	---

3.3. Dunning management

Automate payment retries and improve customer retention.

Dunning Management

Subscriptions With Autocharge

Subscriptions Without Autocharge

Dunning for Subscriptions With Autocharge

On payment success :

Send Thank-you Email along with the Invoice

On payment failure :

Send Payment Failure Email Notification & ...

RETRY PREFERENCES

☐ First Retry

1 days after the initial attempt. If it fails: Send Payment Failure Email Notification

☐ Second Retry

2 days after the initial attempt. If it fails: Send Payment Failure Email Notification

☐ Third Retry

3 days after the initial attempt. If it fails: Send Payment Failure Email Notification

If the final retry attempt fails, then mark the subscription as : Cancelled

Recover Payments

Send Automated Reminders

Reduce Churn

Core Capabilities

1. Easy product management

2. Efficient billing management

3. Convenient payment handling

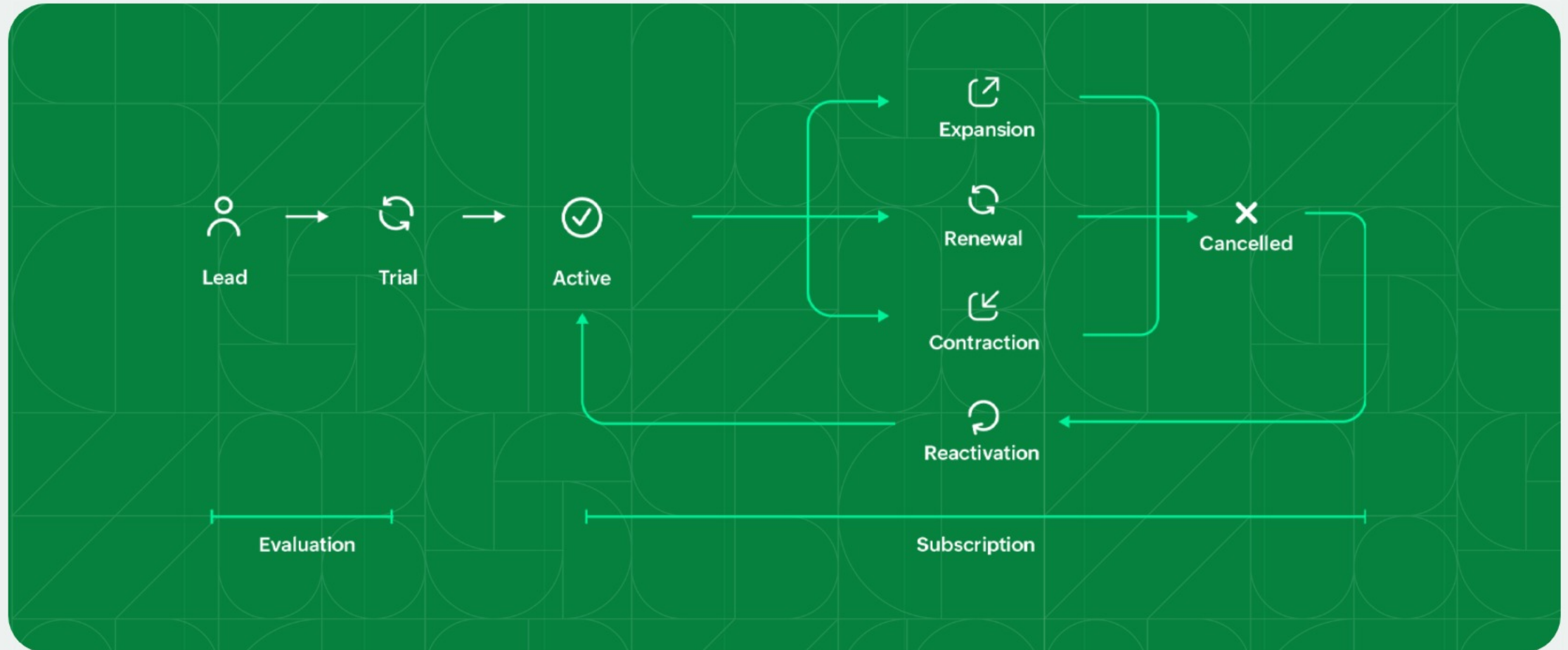
4. Customer lifecycle management

5. Powerful business insights and analytics

6. Marketplace and integrations

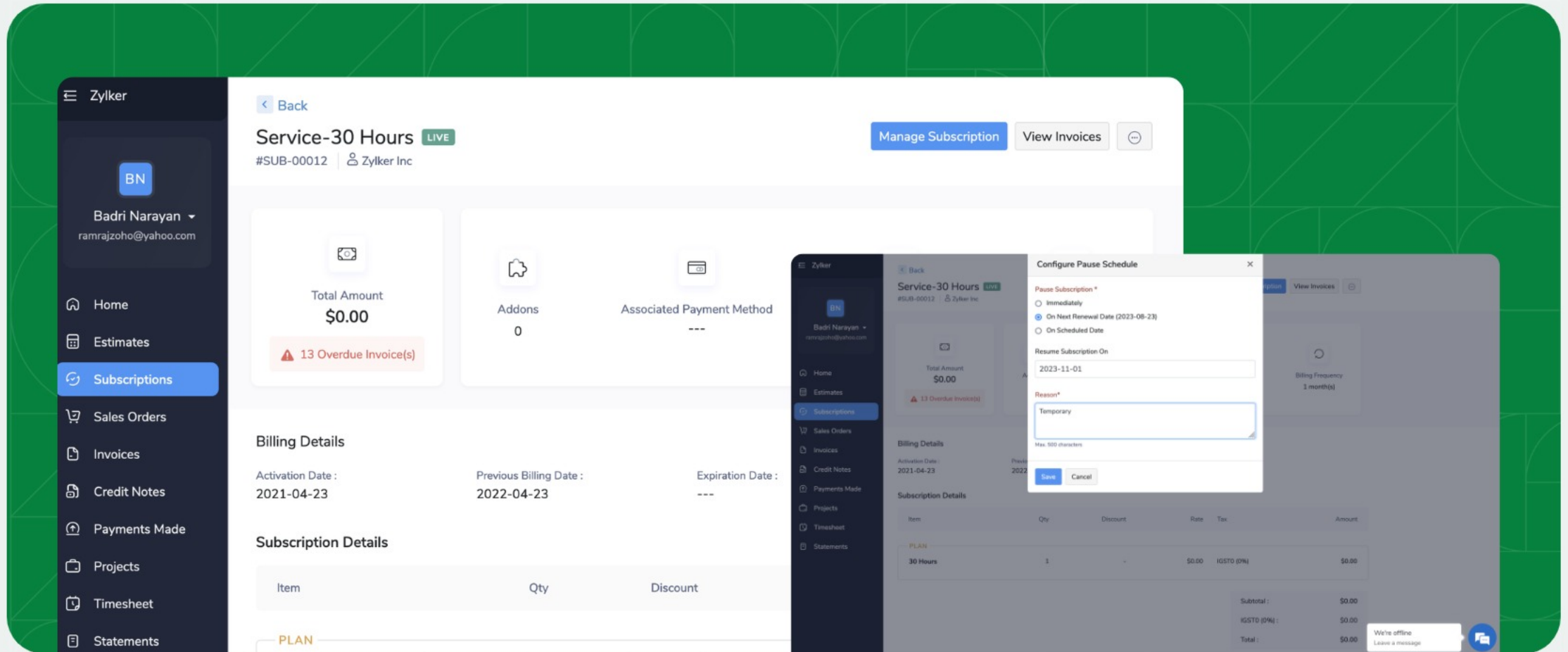
4.1. Customer lifecycle management

Streamline the subscriber lifecycle and trial management, and maximize conversions.



4.2. Subscription management

Create, modify, and extend subscriptions. Let customers pause subscriptions instead of canceling, and reduce voluntary churn.



4.2. Subscription management

Offer free trials, personalize them, and make sure potential customers stay interested by sending automated reminder emails to boost conversions.

The image displays a user interface for managing subscriptions, set against a dark green background. On the left, a 'Subscription Management' panel is shown with an 'Enabled' status. It features four tabs: 'Trials', 'Cancellations', 'Pause & Resume', and 'Payments'. The 'Trials' tab is active, showing options to 'Extend Trials' (checked), 'Maximum extensions allowed' (set to 1), 'Activate Trials Immediately' (checked), and checkboxes for autocharge enabled and disabled subscriptions. On the right, a 'Customer Details' panel for 'Aiden Tan' is visible. It includes a 'Zylker Educational' label and a table of active subscriptions. The table has columns for 'Subscription Amount', 'Trial Expiry Date', 'Activation Date', and 'Renewals remaining'. Below this, a detailed table lists items like 'Premium Mentorship Plan' and 'Setup Fee' with their respective quantities, rates, taxes, and amounts. A dark green dropdown menu is open on the right, listing actions: 'Add Coupon', 'Add One Time Addon', 'Add Charge', 'Update Custom Fields' (highlighted in green), 'Extend Billing Cycle', 'Cancel Subscription', and 'Delete Subscription'.

Subscription Management Enabled

Trials Cancellations Pause & Resume Payments

☒ Extend Trials

Maximum extensions allowed

☒ Activate Trials Immediately

☒ Allow this for autocharge enabled subscriptions

☒ Allow this for autocharge disabled subscriptions

Active Customers Zylker Educational

Aiden Tan

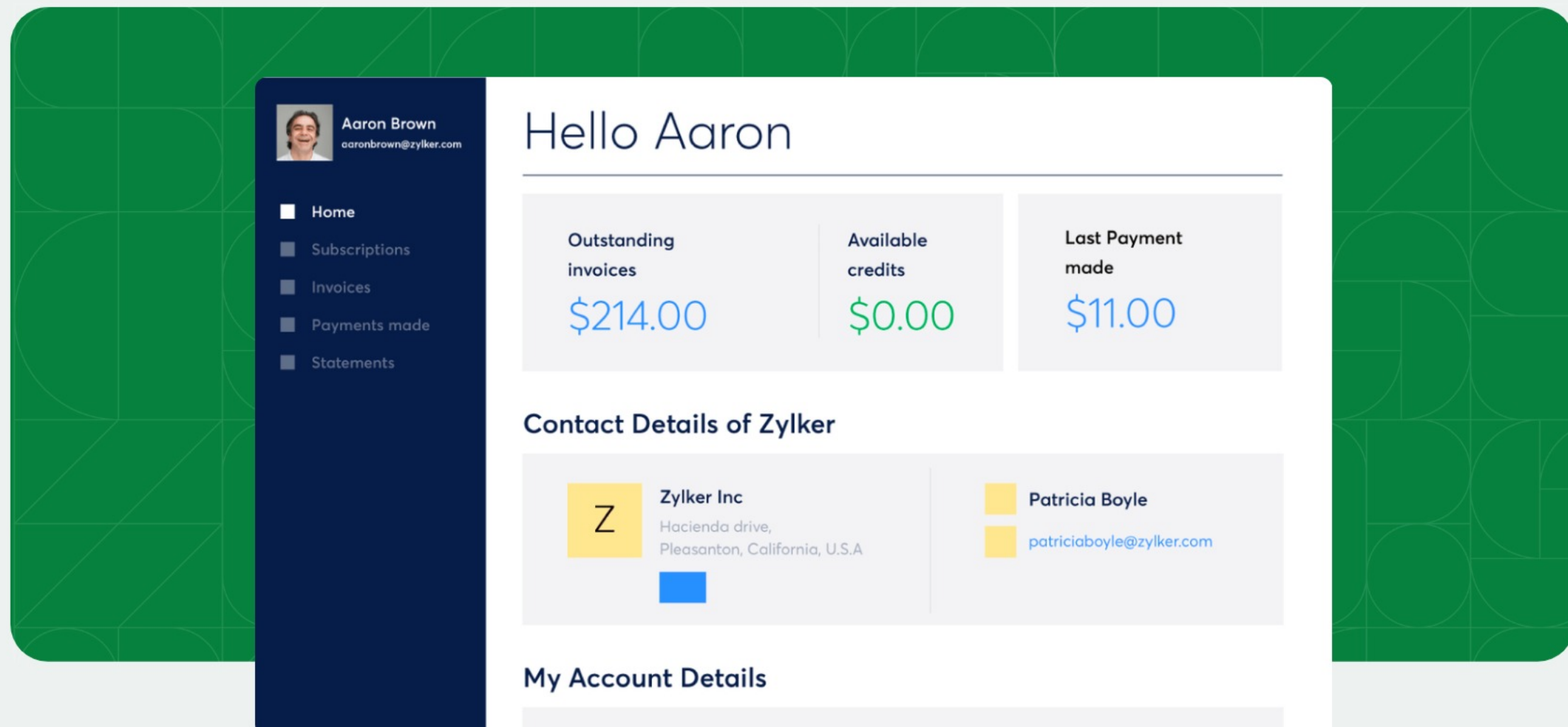
Subscription Amount	Trial Expiry Date	Activation Date	Renewals remaining
\$849.98	23 Sep 2023	23 Sep 2023	3 Cycles

PLAN & ADDON DETAILS	QTY	RATE	TAX	AMOUNT
Premium Mentorship Plan	1	\$799.99	-	SGD799.99
Setup Fee	-	\$49.99	-	\$49.99
TOTAL				\$849.98

- Add Coupon
- Add One Time Addon
- Add Charge
- Update Custom Fields
- Extend Billing Cycle
- Cancel Subscription
- Delete Subscription

4.3. Customer portal

Offer customers a complete view of all their transactions.



4.3. Customer portal

Access timesheets and projects from the portal.

The screenshot displays the Zylker Customer Portal interface. On the left is a dark sidebar with the user's name 'Badri Narayan' and email 'ramrajzoho@yahoo.com'. The sidebar menu includes links for Home, Estimates, Subscriptions, Sales Orders, Invoices, Credit Notes, Payments Made, Projects, and Timesheet (highlighted in blue).

The main content area is divided into two panels. The left panel, titled '< Back to Timesheet Approvals', shows a 'Phase 1' status with a 'Pending Approval' tag. It lists the project 'Web design' sent by 'Sriharivash Sriharivash S'. The 'Logged Hours' are 03:25. Below this is a table with two tabs: 'TIME ENTRIES (2)' and 'COMMENTS'. The table has columns for Date and Projects.

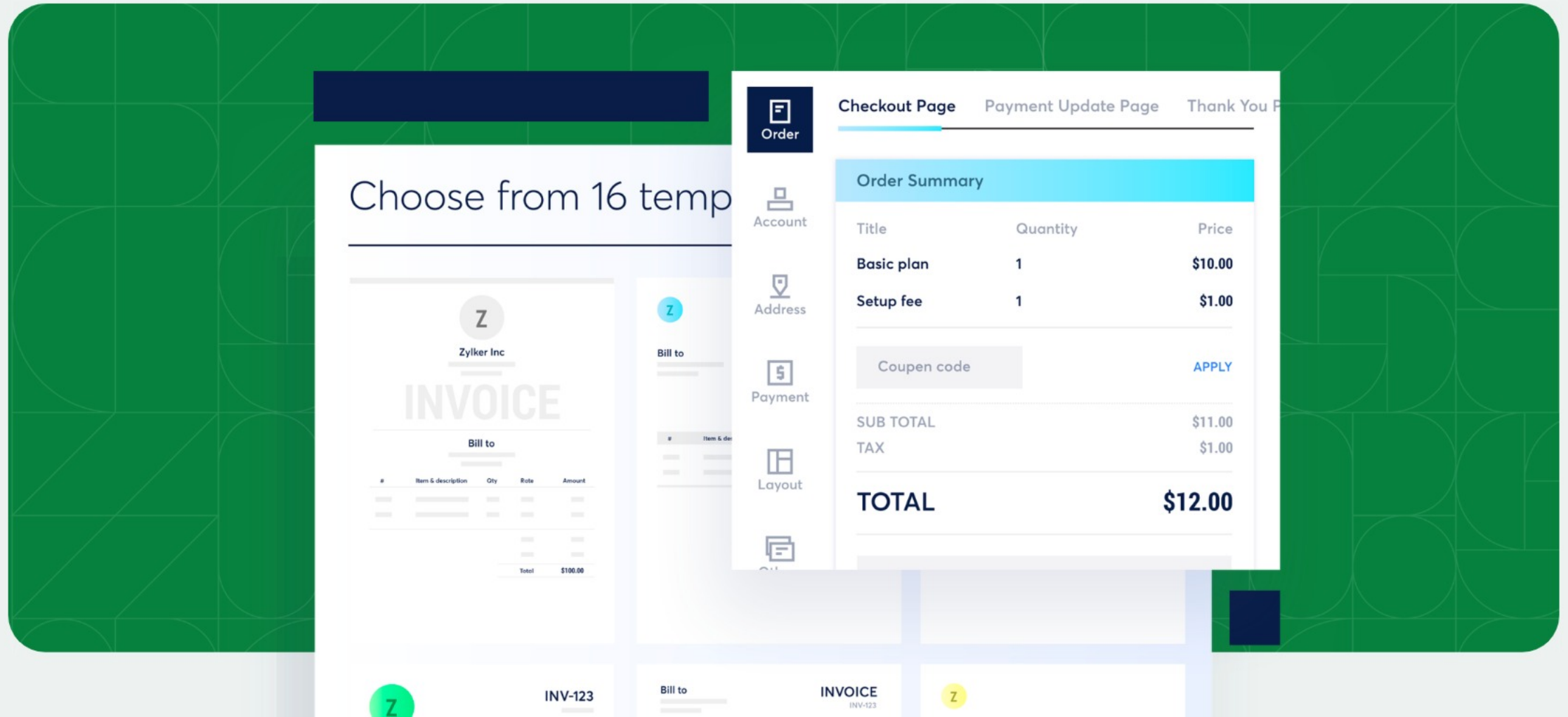
Date	Projects
2023-08-03	Web design
2023-08-03	Web design

The right panel, titled '< Back to Projects', shows the 'Web design' project with 'LOGGED HOURS' of 03:25 and 'UNBILLED HOURS' of 03:25. It features a table with tabs for 'Tasks', 'Time Entries', and 'Comments'. The 'Time Entries' tab is active, showing a table with columns: Task, Associated Timesheet, Date, Time, and Status.

Task	Associated Timesheet	Date	Time	Status
R&D	Phase 1	2023-08-03	02:25	Pending Appr...
Prototype	Phase 1	2023-08-03	01:00	Pending Appr...

4.4. Enhance customer experience

Choose from 15+ templates available and enhance every aspect—company logo, font, background, color, margin, and more.



Core Capabilities

1. Easy product management

2. Efficient billing management

3. Convenient payment handling

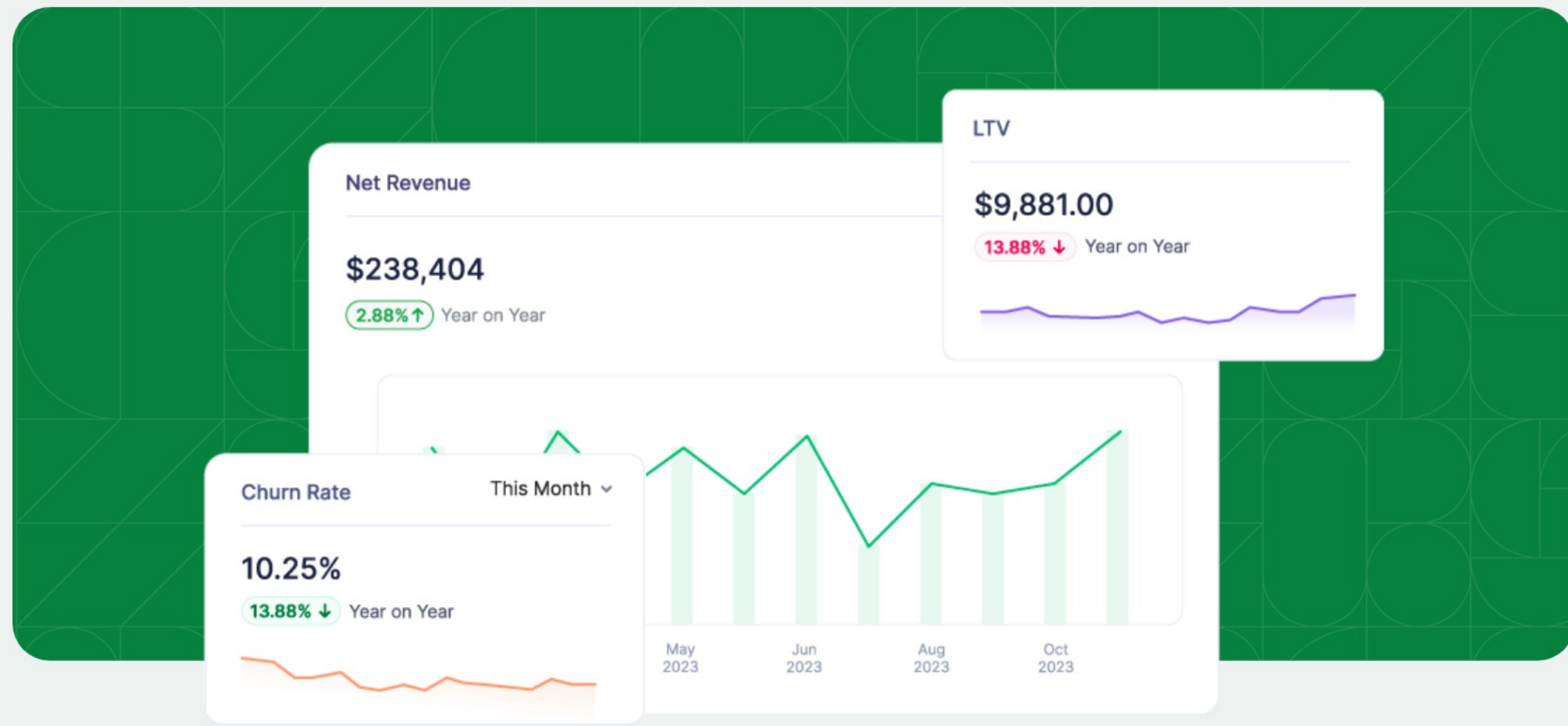
4. Customer lifecycle management

5. Powerful business insights and analytics

6. Marketplace and integrations

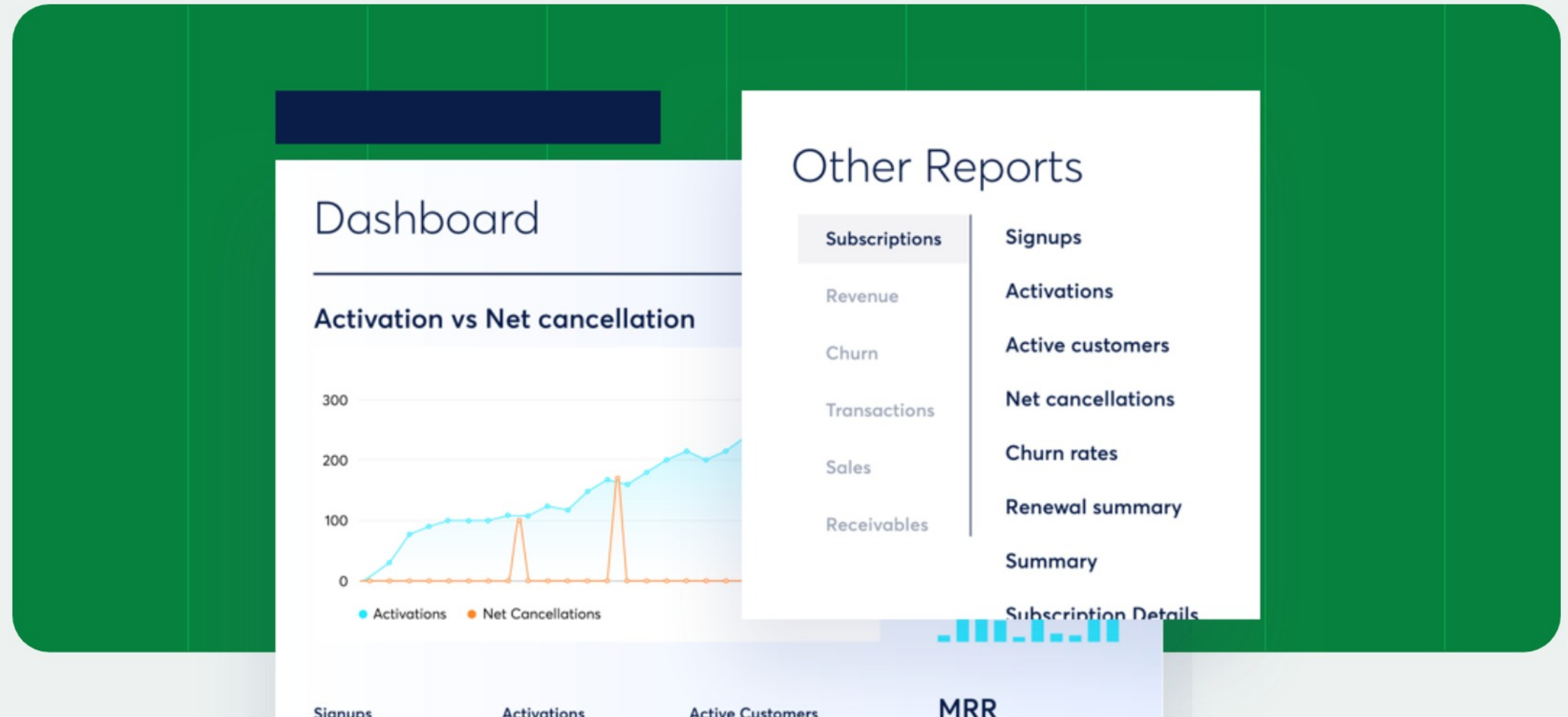
5.1. Reporting and analytics

Automatically recognize revenue, close books faster, and get real-time revenue analytics.



5.1. Reporting and analytics

Run intuitive AR reports and stay on top of your finances.



5.2. Cohort analysis

Understand customer preferences and improve retention.

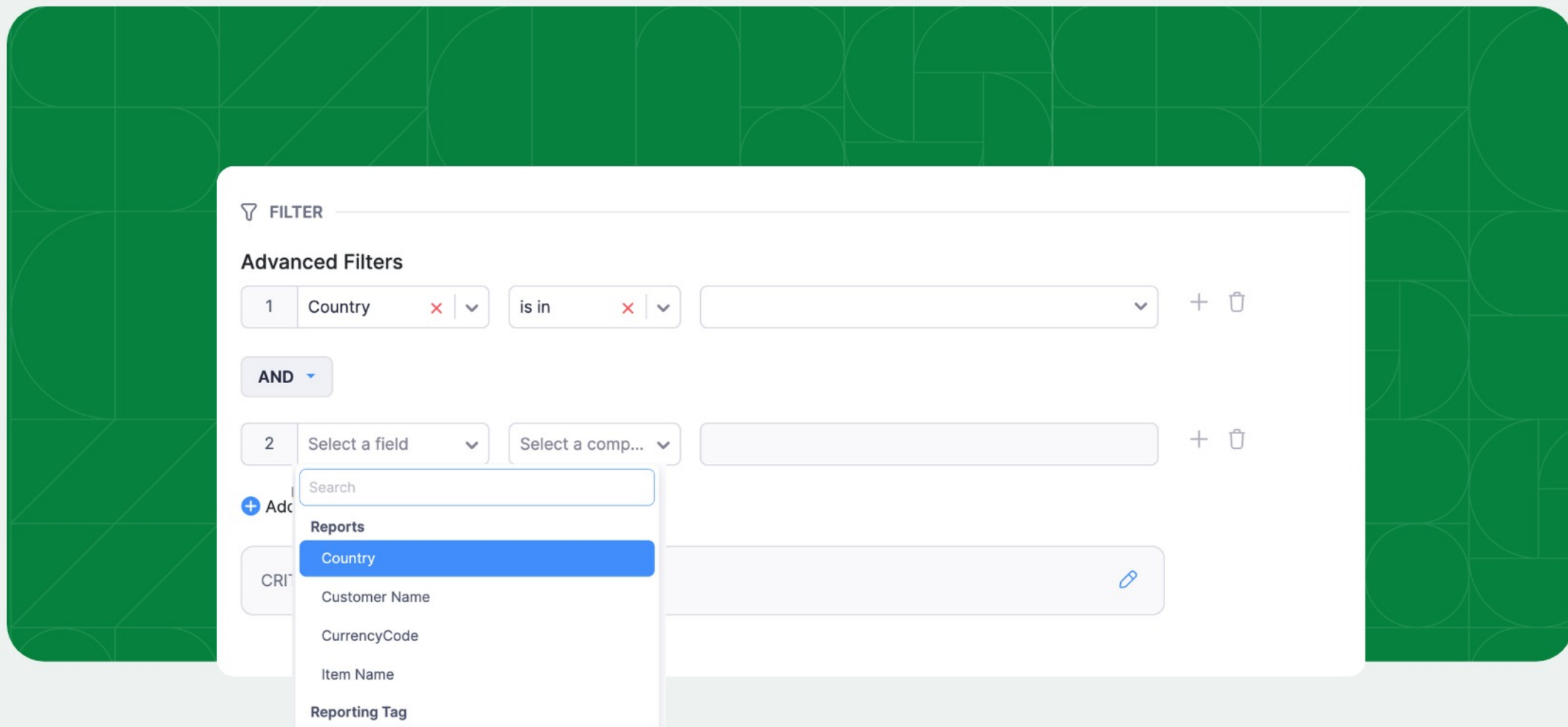
Monthly Recurring Revenue (MRR) (From 01/07/2022 To 11/07/2023)

Cohort Analysis 6 Months Absolute MRR Growth

Cohort	Cohort Value	Months since activation						
		0	1	2	3	4	5	6
Jan 2023	Rs.9,959.51	Rs.8,480.94	Rs.8,480.94	Rs.11,814.28	Rs.1,814.28	Rs.1,385.71	Rs.100.00	Rs.100.00
Feb 2023	Rs.4,755.87	Rs.4,730.87	Rs.3,740.87	Rs.2,745.87	Rs.0.00	Rs.0.00	Rs.0.00	-
Mar 2023	Rs.8,645.23	Rs.8,645.23	Rs.8,216.66	Rs.8,216.66	Rs.4,883.33	Rs.1,550.00	-	-
Apr 2023	Rs.8,179.74	Rs.8,129.74	Rs.3,422.60	Rs.2,372.60	Rs.2,372.60	-	-	-
May 2023	Rs.53,751.72	Rs.29,908.86	Rs.28,300.00	Rs.26,800.00	-	-	-	-
Jun 2023	Rs.34,000.00	Rs.31,000.00	Rs.6,750.00	-	-	-	-	-
Jul 2023	Rs.2,500.00	Rs.0.00	-	-	-	-	-	-
Average	Rs.17,398.87	Rs.12,985.09	Rs.9,818.51	Rs.10,389.88	Rs.2,267.55	Rs.978.57	Rs.50.00	Rs.100.00

5.3. Advance report segmentation

Filter your reports and get the exact data you need.

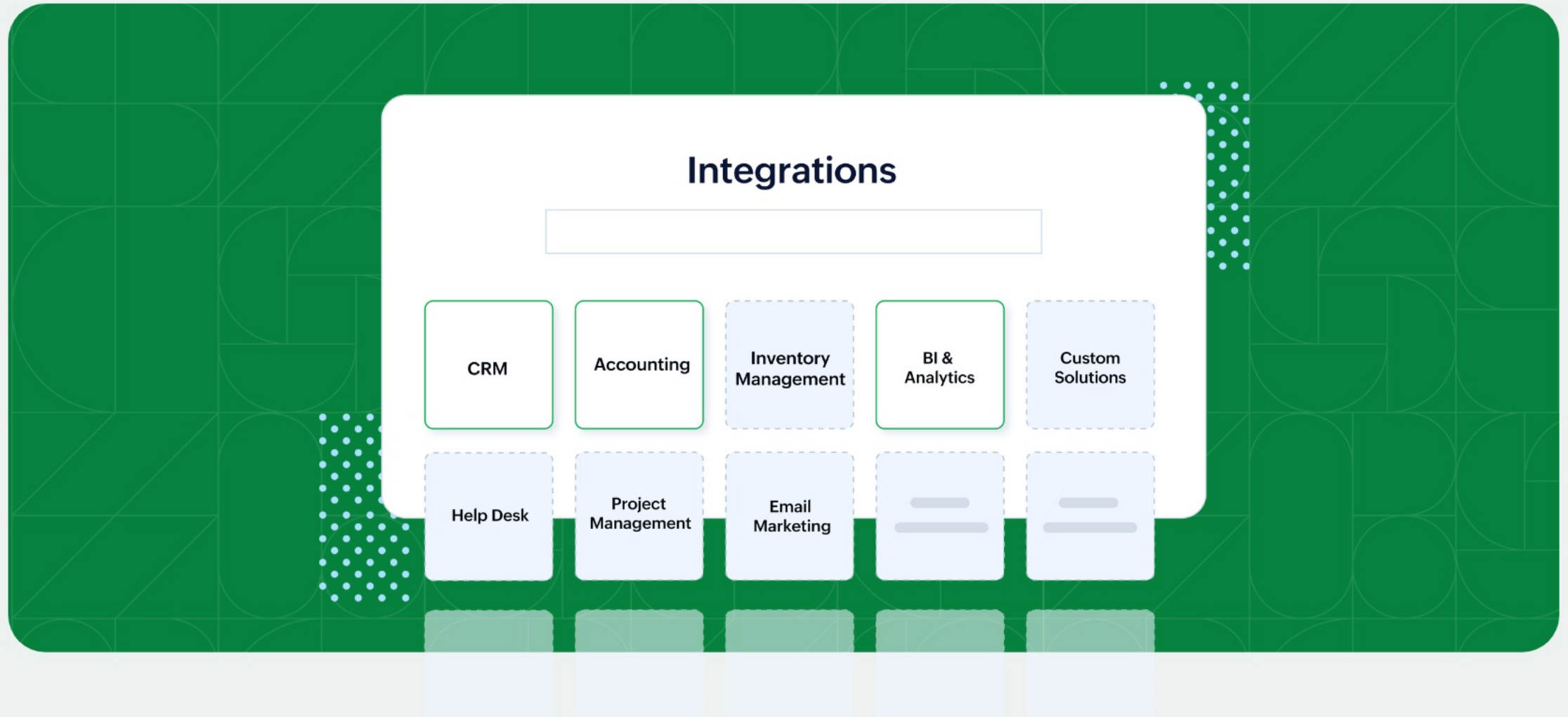


Core Capabilities

- 1. Easy product management**
- 2. Efficient billing management**
- 3. Convenient payment handling**
- 4. Customer lifecycle management**
- 5. Powerful business insights and analytics**
- 6. Marketplace and integrations**

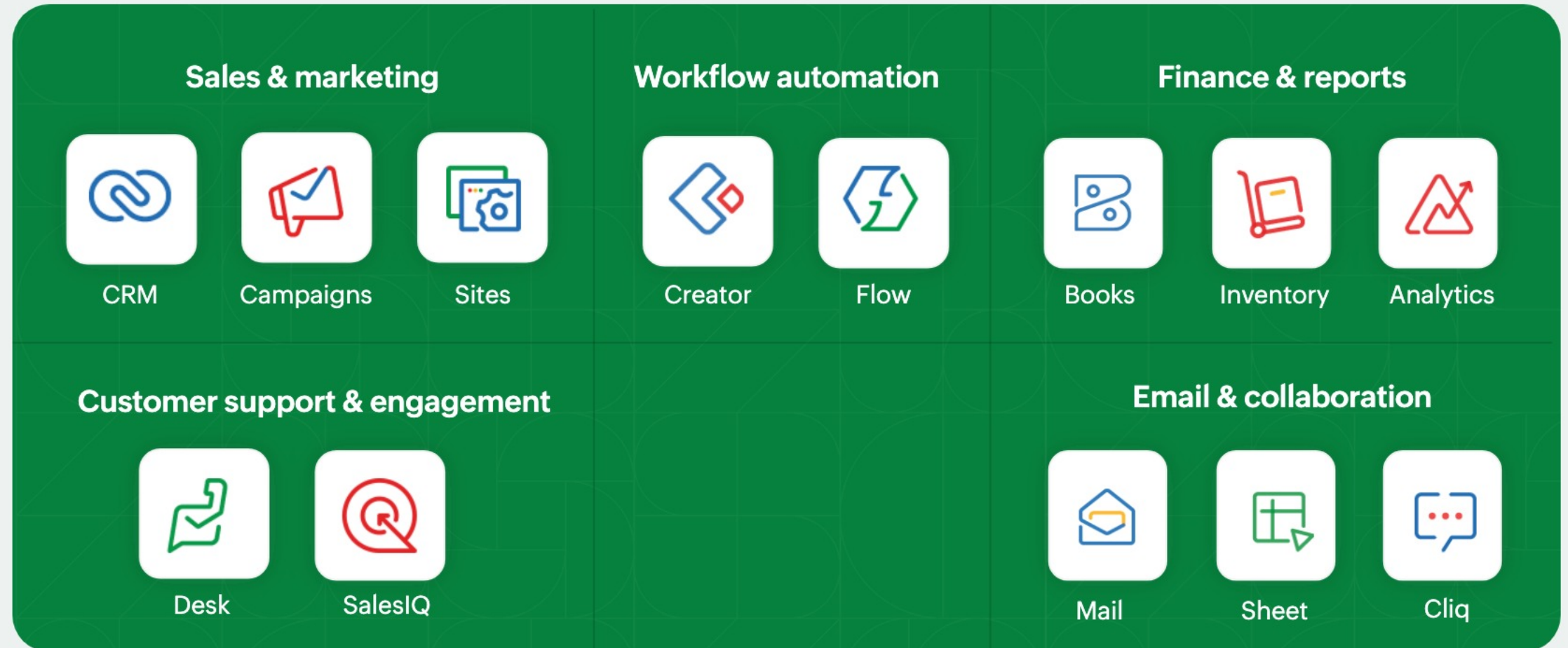
6.1. Integrations

Integrate with any application easily to enable teams to work together, reduce mundane tasks, and get contextual insights.



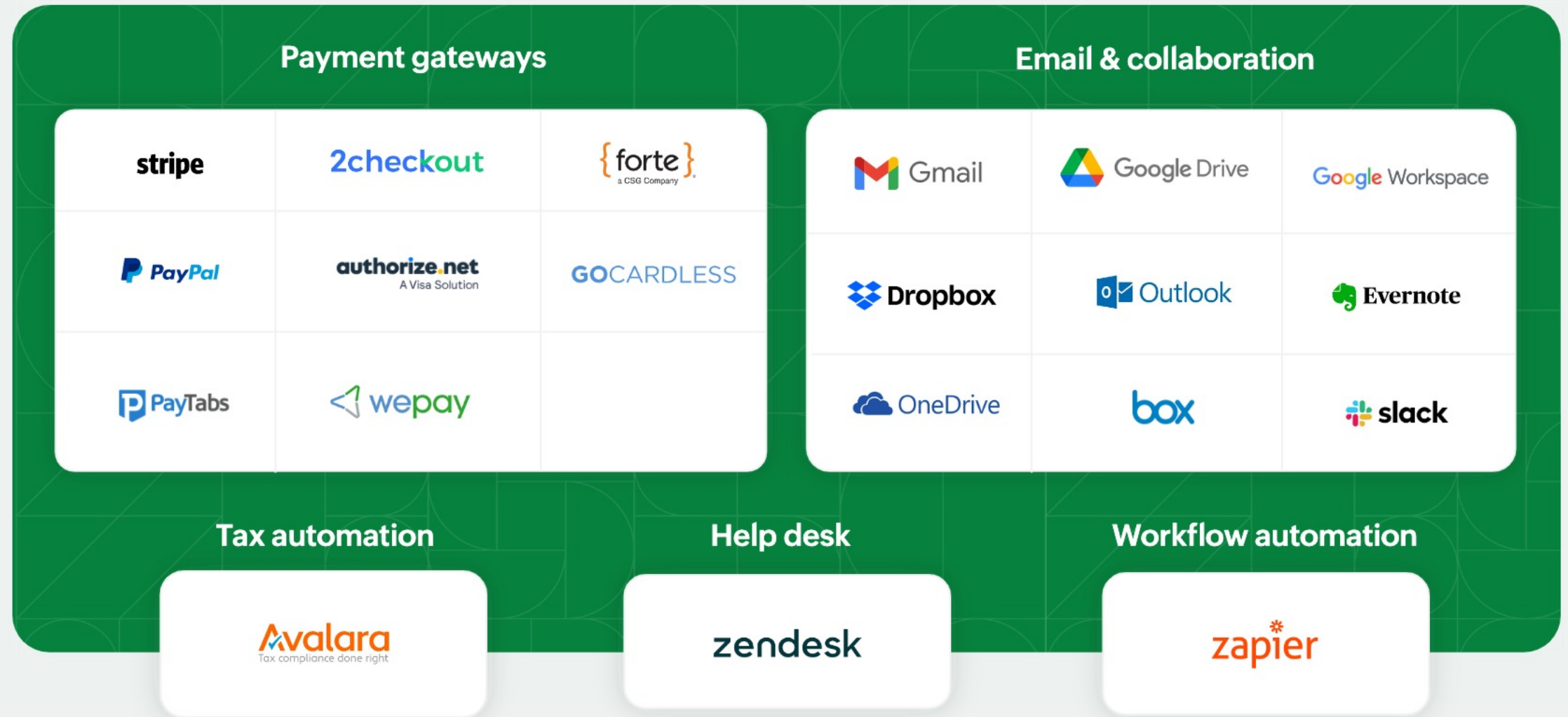
6.2. Key differentiators

Integrated suite of Zoho apps



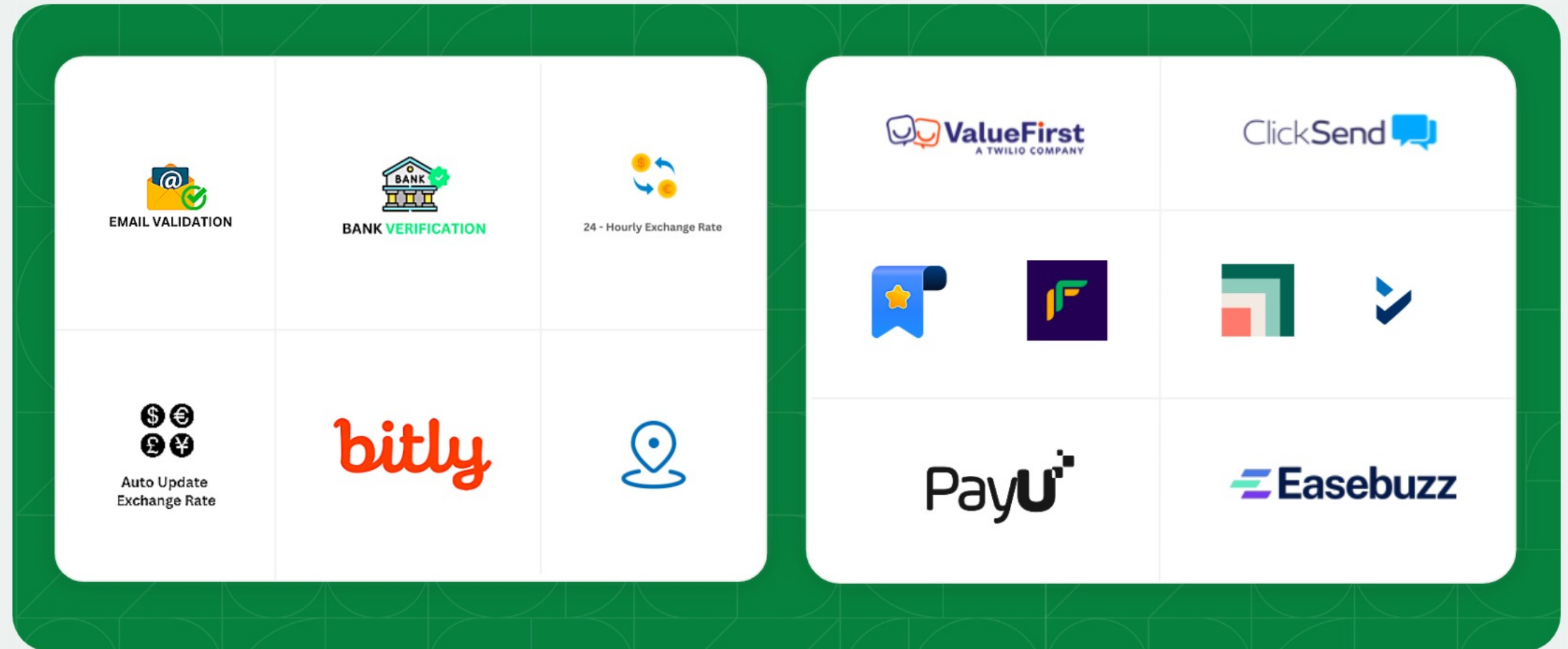
6.2. Key differentiators

Growing ecosystem of third-party applications



6.3. Marketplace plugins

Add extended functionalities to Zoho Billing with 40+ plugins





Privacy & compliance



Customer reviews



Gilles Groven, Product Manager

UENI

"We operate in 10+ countries spread across four continents. Zoho Billing takes care of managing our recurring billing so seamlessly that we no longer consider billing a challenge while expanding to new markets! "



Brock Andersen, Managing Partner,
Independent Contractor Tax Advisors

" We use Zoho Billing to manage the invoicing and payment processing end of our business. Zoho Billing and Zoho Books integrates seamlessly and it allows us to focus on delivering services to our clients instead of managing billing headaches. I've also had great experience with their support and I recommend it to anyone considering their options."

Thank you.