▸ Zerto Automated Billing Program for Service Providers

What is it?

Automated Billing is a 3 step process that removes the hassle of manual monthly reporting and its mandatory for all Service Providers implementing Zerto's Software Solutions.

Benefits:

Scalable solution for Cloud Team growth

Eliminates errors in monthly reporting

Saves time for the Service Provider, the Aggregator (Adistec) & Zerto

Step 1 – Primary Contact Setup

Technical Approval Contact *{SF field – CH approving contact}* –the technical person who will review and approve monthly usage reports. In most cases, this is the person who primarily handles Zerto Software in the environment.

Billing/Invoice Contact *{SF Field – Accounting Dept Contact}* - accounting contact who will receive and process the invoice sent by Adistec Chile SPA, as well as providing a PO if needed.

Step 2 – Find out where the Software is installed

Ask the technical contact how many sites they have, and the names of the sites where they've installed the software. Compare this to the analytics

Service Provider account in Zerto's Salesforce → Find the current month's billing object→ Billing download Link :

Sites in Report:	
Name	Site ID
PQA Academy	94dc90a0-40db-4bde-a4cf-8468912047ff
Azure	32f06ef8-e0e0-4a17-b23d-969effe88807
MyDRaaS-v2	075e06fe-35af-4be3-aea0-ea2780c8fa9a
LAB	d2db0070-8f97-464e-83cb-ad46e9692244
Sites outside Report (customer sites):	
LabCorp-HQ	
BBR - Softcat	
Ascot	
Indigo Telecom Group	
Biffa	
The Bahamas Maritime Authority	
CompleteMoneyGroup	

Step 3 – Validating the configuration of the ZCM

Periodically, the ZCM ("Zerto Cloud Manager") sends its usage information to a Zerto Centralized Server. This report is based on the information received from all Zerto Virtual Managers (ZVMs), aggregating the data from all sites and automatically removing duplicates.

This report provides **average monthly usage & support information** (environment, license, and version info)

The report is then sent securely using HTTPS in the first few days following the end of the calendar month to a Zerto Server.

Step 3 – Validating the configuration of the ZCM/Cont.

In order for the Automated Billing mechanism to function, all cloud ZVMs must be added as "sites" to the ZCM. This ensures each production ZVM is correctly captured in our call home analytics.

Steps for the Service Provider to validate their Zerto Environment:

1. Utilize the ZCM. This will allow you to manage all of your sites from one location. All of your cloud ZVM servers should be added as sites in the ZCM server.

2. Ensure that the ZCM server has **TCP port 443** outbound open to the internet.

Automated Billing is Enabled!

At month's end, Zerto will provide the Adistec and the Service Provider with an automated usage report for review and approval.

Within <u>5 business days</u>, the Service Provider or the Aggregator can reply with questions or adjustments *{SF field: Request to exclude VMs}*.

Adjustment VMs are those used for trial or testing (Not POCs). This can be done within the excel file provided by Zerto. The file must be returned to Zerto within <u>5 days of receiving</u> .

On Zerto's side - Salesforce actions to take:

Check off the following boxes:

▼ **Billing**

Primary Contact for Billing	Phil Reeve
Accounting Department	AP Harbor
CH Approving Contact	Phil Reeve
Payment Terms	30
All ZVM are reporting?	✓
CH Report Contractual Approval	✓
Requested to exclude VMs	☐
CH Report Participant	✓
Opt out of Automated Billing	☐
Approved Automatic Billing	✓
Tax Exempt	☐

Additional Information

You can review the **ZCE billing Knowledge Base article** for additional times to check for connectivity. You will need to be signed into the Zerto Support Portal to view this page. If you do not have a log in please email support@zerto.com

If you need assistance with this process, please contact acs@adistec.com

Adistec

Thank You!
Email: acs@adistec.com

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