

MSPbots Paywall and Billing Setup

This article discusses the following topics about the MSPbots Paywall and Billing setup:

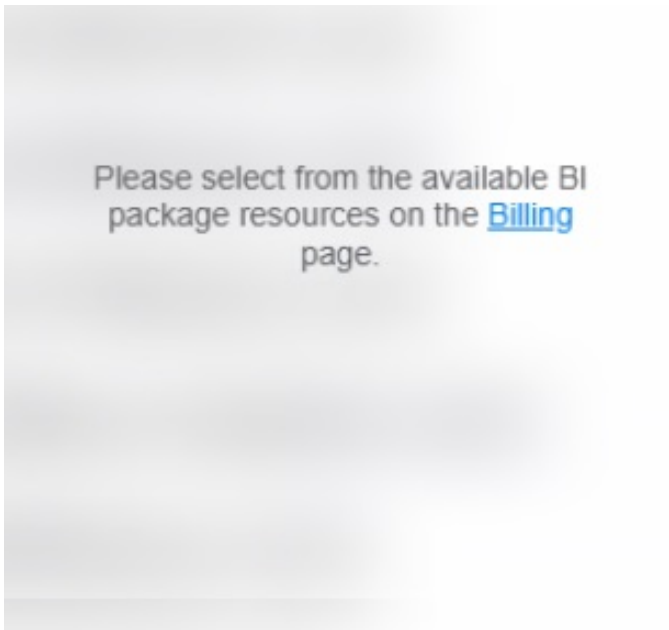
1. [What are the MSPbots paywall notifications?](#)
2. [Setting up your billing account](#)
3. [Verifying your ACH account](#)
4. [Upgrading your plan or bundle](#)
5. [How to purchase or subscribe to new assets \(A la Carte Usage\)](#)
6. [How to view your billing history and get an invoice copy](#)
7. [How to cancel an A la Carte Usage subscription](#)
8. [Adding a Billing Email Address](#)
9. [Changing Your Billing Email Address](#)
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1. What are the MSPbots paywall notifications?

When your MSPbots plan has expired, or when you try to access an asset that is not included in your current plan, you will receive paywall notifications. These notifications indicate that your access to MSPbots assets has been restricted, and you will receive guidance on how to proceed.

These are examples of paywall notifications that users may encounter.

Dashboards and Widgets Paywall Notifications



Your free subscription to BI Package has expired. Please purchase the BI Package subscription to enable the widget.

Purchase

Request Demo

14 days trial

Your free subscription to BI Package has expired. Please purchase the BI Package subscription to enable the widget.

Purchase

Request Demo

Bot Usage Paywall Notification



You have used 1 out of 1 bots that you have purchased, please turn off some bots or upgrade your purchase.

Purchase

Cancel

By default, MSPbots clients are subscribed to the Free Bundle which has a time-based free trial on system integrations and includes limited features and user access. To fully maximize the benefits of the MSPbots features on your business, we recommend [upgrading your bundle or subscribing to new assets and plans](#).

What are the roles and fees assigned to new users?

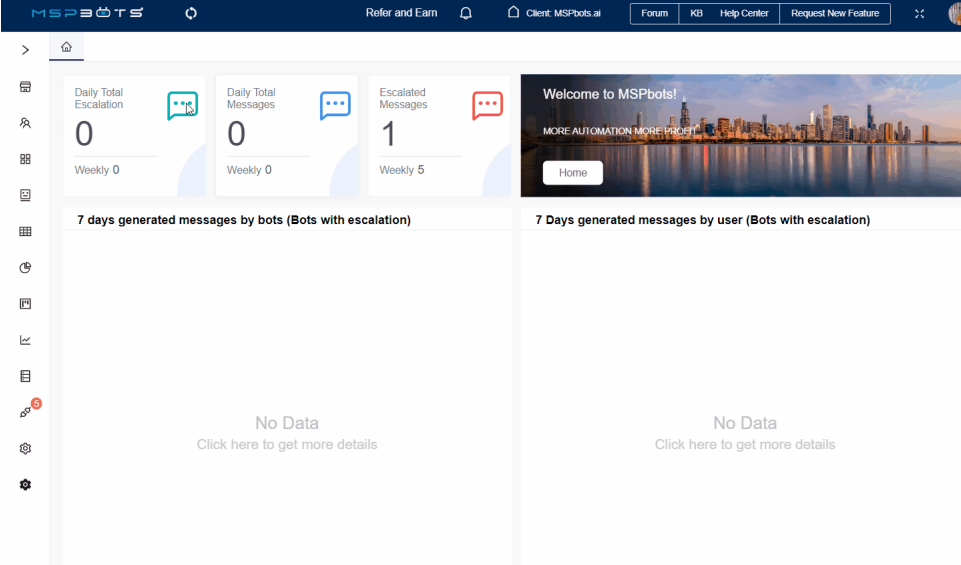


- For the A LA CARTE package: New users synchronized from Office 365 will be assigned a **User** role, and related fees will not be automatically charged to the tenant account that purchased the package.
- For the STARTUP/PROFESSIONAL package: New users synchronized from Office 365 will be assigned a **Dashboard Only** role, and related fees will not be automatically charged to the tenant account that purchased the package.

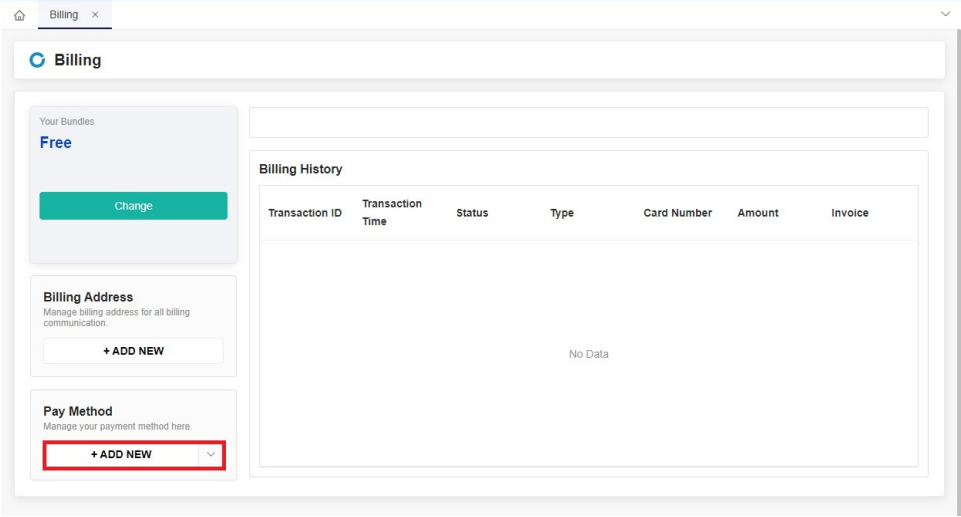
2. Setting up your billing account

Get your account ready for future transactions and set up billing with these steps:

1. Log in **MSPbots** app and navigate to **Settings > Billing**.



2. On the **Billing** tab, navigate to the **Pay Method** section and click the **+ ADD NEW** button.



3. Select **Add Credit Card** or **Add Bank Account**.

Billing

Your Bundles
Free
Change

Billing Address
Manage billing address for all billing communication.
+ ADD NEW

Pay Method
Manage your payment method here.
+ ADD NEW

Add Credit Card
Add Bank Account

Billing History

Transaction ID	Transaction Time	Status	Type	Card Number	Amount	Invoice
No Data						

- If you selected **Add Credit Card**, fill in the following information on the **Create Card** tab:
 - **First Name**
 - **Last Name**
 - **Card Number**
 - **Exp. Month**
 - **Exp. Year**
 - **Security Code**

Credit Card ACH

* First Name * Last Name

Card Number

Exp. Month Exp. Year Security Code

Cancel Save

- If you selected **Add Bank Account**, fill in the following information on the **ACH** tab:
 - **Name as per Account**
 - **Account Number**

◦ **Routing Number**

Credit Card

ACH

* Name as per Account

* Account Number

* Routing Number

Cancel

Save

4. Click **Save** to add the new billing account. The card number or bank account number will be saved in the Pay Method section. Use this information for your future transactions.

Your Bundles

Free

Change


Billing Address

Manage billing address for all billing communication.


+ ADD NEW

Pay Method

Manage your payment method here.

 6789 ...

Pending Verification [Verify](#)

 *****1111 ...

Expiry 12/2023

Primary

+ ADD NEW

Billing History

Transaction ID	Transaction Time
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3. Verifying your ACH account

You need to verify your ACH account if you added a bank account to your payment method. To do this,


1. Go to the Pay Method section on the Billing screen.

2. Click the **Verify** link beside your bank account.

Pay Method
Manage your payment method here.

 6789 ...


Primary

 Pending Verification **Verify**

+ ADD NEW

3. On the Verify window, enter two **Verification Amounts** and click **Confirm**.

Verify ×

 You have a maximum of 10 attempts to verify your payment method.

* Verification Amount 1*

USD


* Verification Amount 2*

USD

Cancel Confirm

4. The authentication process is successful once your ACH account no longer shows **Pending Verification**.

Pay Method
Manage your payment method here.

 6789 ...

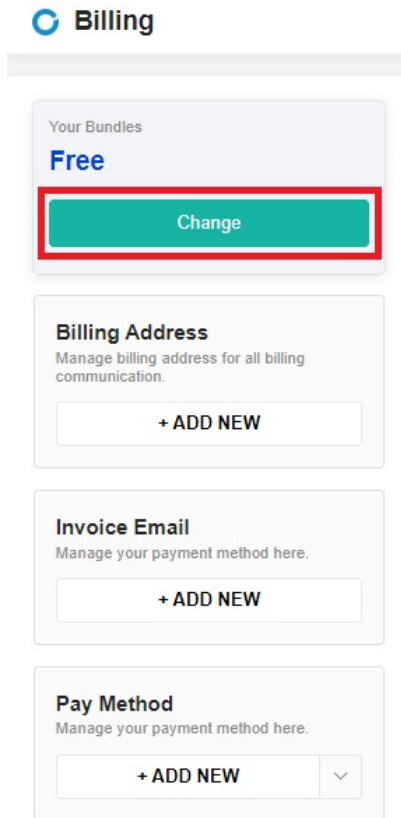
Primary

+ ADD NEW

4. Upgrading your plan or bundle

Boost the benefits of MSPbots on your business by upgrading your plan or bundle. Once you've set up your billing account, you can follow these steps to upgrade:

1. On the Billing tab, navigate to the Your Bundles section and click **Change**.



2. When the Customize your plan window opens, select your preferred **Bundle Type** and **Billing Frequency**.
3. Next, select a BI package, the number of users, and the apps you want to include in the plan. The system automatically calculates the total cost as you make your selection.

Example:

Selected bundle - Startup Bundle

Number of users - 14

The Startup Bundle gives access to up to 10 users. Because the users are more than 10, you must purchase four slots for additional users.

Calculation:

$$\begin{aligned}\text{Total Cost} &= \text{Startup Bundle } (\$700) + \text{Extra number of Users} \times \text{cost per user } (4 \times \$70 = \$280) \\ &= \$700 + \$280 \\ &= \$980\end{aligned}$$

Also included in the Startup is your selection of up to four BI packages. You can change this selection later.

4. Click **Next** when done selecting.
5. When the Your Order window appears, review the details of your order and click the **Proceed To Checkout** button.
6. Lastly, review the details of your account, and click **Pay (amount) & Subscribe** to complete your order.

7. To verify your upgrade, go back to [Marketplace](#) > **Bundles**. If you upgraded to Startup, you should see the **Current Plan** button in this section.

STARTUP
For teams looking to create a single source of truth to manage their workflows and processes

\$700/Month
\$70/seat for more than 10 members

CURRENT PLAN

10 Users of Attendance
4 Integrations
10 Bots/User
10 Users of NextTicket
✓ Onboarding Support
2 Hours of Concierge service monthly
3 Days Email Support SLA
✓ Phone Support

8. To confirm billing updates, go back to **Settings** > **Billing**. Check for the following:

- The **Your Bundles** section shows your current plan.
- When clicked, the **Bundles Usage** tab shows the list of **Assets**, **Quantity**, and the **Next Billing** date.

The screenshot shows the MSPbots Billing page. On the left sidebar, 'Billing' is highlighted. The main content area has two tabs: 'A la Carte Usage' and 'Bundles Usage', with the latter being selected. Below the tabs, there's a table with columns: Assets, Quantity, Next Billing, and Action. The table lists various assets like Users, Business Intelligence, Bots, Attendance Manager, Next Ticket for ConnectWise, and Next Tick for Autotask. Below this table is a 'Billing History' section with columns: Transaction ID, Transaction Time, Card Number, Amount, and Invoice. The left sidebar also shows a 'Your Bundles' section with a 'Startup' plan and an 'Upgrade' button.

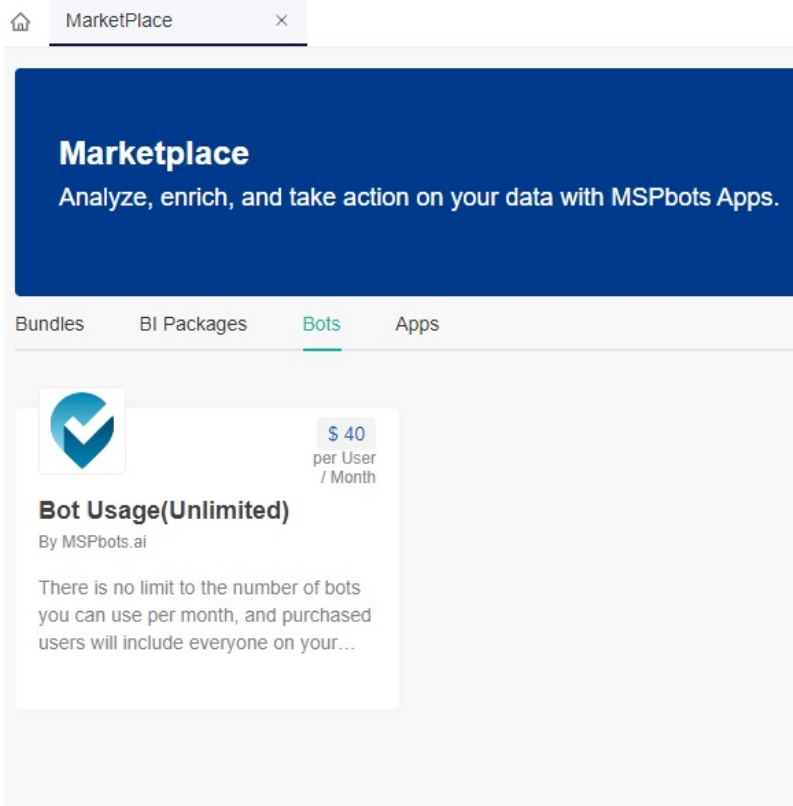
Assets	Quantity	Next Billing	Action
Users	14	09/04/2022 09:14 UTC	
Business Intelligence	4 Integrations	09/04/2022 09:14 UTC	
Bots	1 Bots/User	09/04/2022 09:14 UTC	
Attendance Manager	Included	09/04/2022 09:14 UTC	
Next Ticket for ConnectWise	Included	09/04/2022 09:14 UTC	
Next Tick for Autotask	Included	09/04/2022 09:14 UTC	

Transaction ID	Transaction Time	Card Number	Amount	Invoice
txn_168Y7TDX19427YK	08/04/2022 09:14 UTC	*****1111	\$695	
txn_168Y7TDX08668	08/04/2022 09:11 UTC	*****1111	\$35	
txn_168Y7TDXWYSpukay	08/04/2022 09:02 UTC	*****1111	\$149	

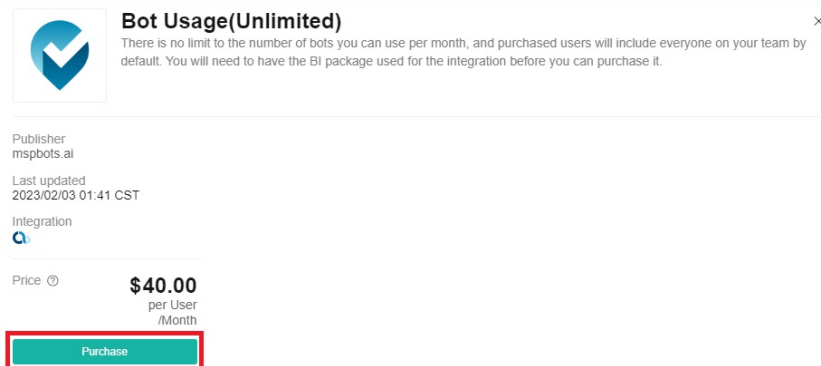
5. How to purchase or subscribe to new assets (A la Carte Usage)

1. Go to the MSPbots [Marketplace](#) and click the asset that interests you. Select BI Packages, Bots, Apps, or Featured apps.

- For example, if you need Bots for your company, click the **Bots** tab and **Bot Usage**.



- Next, click the **Purchase** button in the Bot Usage window.



- Choose to pay monthly or annually, then select the BI package and specify the additional bot users that should be included in the package. The cost will be calculated automatically according to your selection.
- Click **Next** and follow the prompts.
- Review your order and click the **Proceed To Checkout** button.
- Lastly, click the **Pay & Subscribe** button to complete your order.
- Validate your purchase on **Billing > A la Carte Usage** and check if the new asset is on the Assets list.

6. How to view your billing history and get an invoice copy

To view the details of your billing history, go to [Billing](#) and scroll down to the Billing History section. This section shows the Transaction ID, Transaction Time, Card Number, Amount, and a link to the downloadable invoice.

Marketplace

Billing

Billing

Your Bundles

Startup

\$695 USD upcoming payment on Sep 04 2022

Upgrade

Cancel

Pay Method

This is your primary payment method

VISA

*****1111

Expiry 12/2029

Edit

A la Carte Usage

Bundles Usage

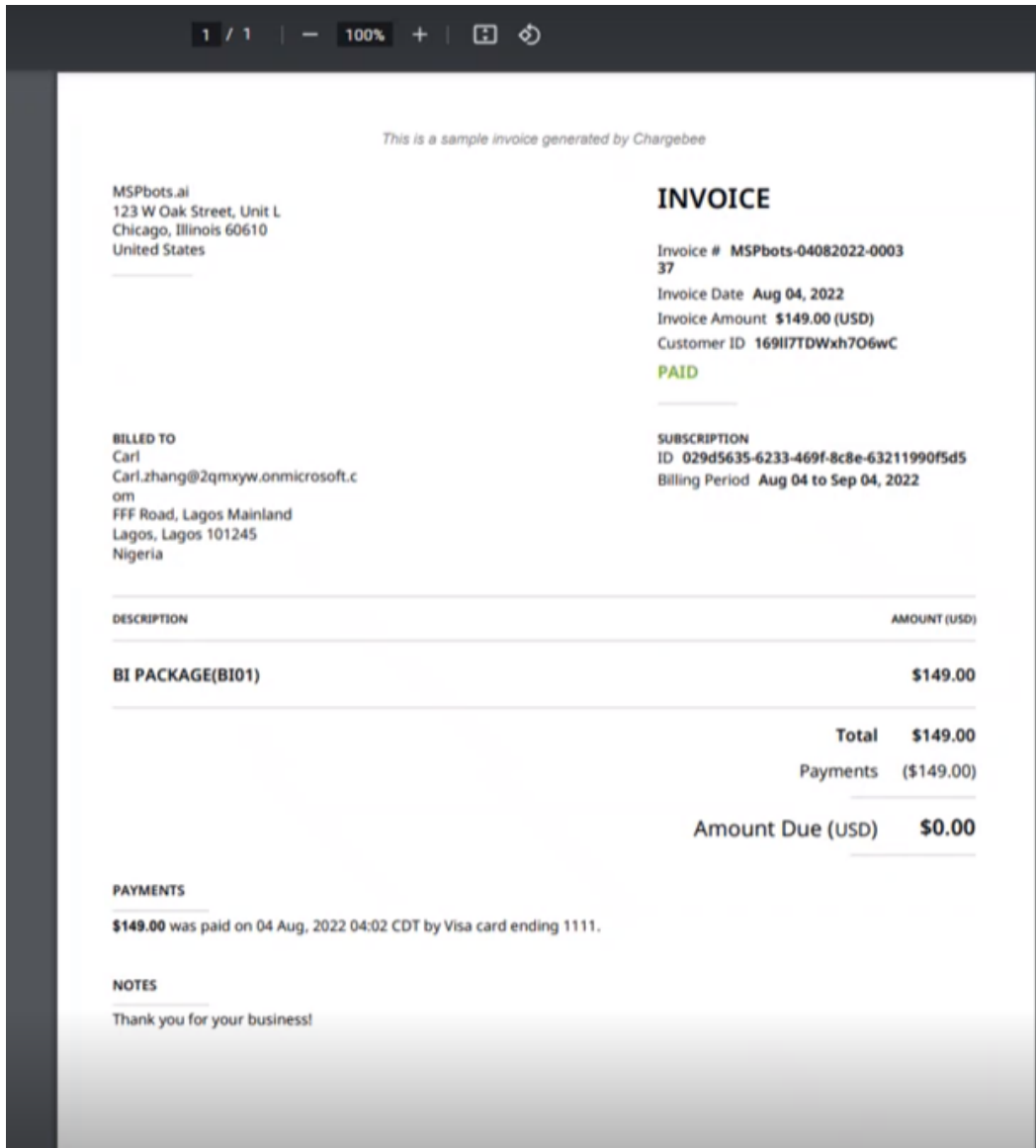
Assets	Quantity	Next Billing	Action
Users	14	09/04/2022 09:14 UTC	
Business Intelligence	4 Integrations	09/04/2022 09:14 UTC	
Bots	1 Bots/User	09/04/2022 09:14 UTC	
Attendance Manager	Included	09/04/2022 09:14 UTC	
Next Ticket for ConnectWise	Included	09/04/2022 09:14 UTC	
Next Tick for Autotask	Included	09/04/2022 09:14 UTC	

Billing History

Transaction ID	Transaction Time	Card Number	Amount	Invoice
txn_16BY7ITDX19427YK	08/04/2022 09:14 UTC	*****1111	\$695	
txn_16BY7ITDX0S6e6ll	08/04/2022 09:11 UTC	*****1111	\$35	
txn_16BY7ITDWyGgu4xy	08/04/2022 09:02 UTC	*****1111	\$149	

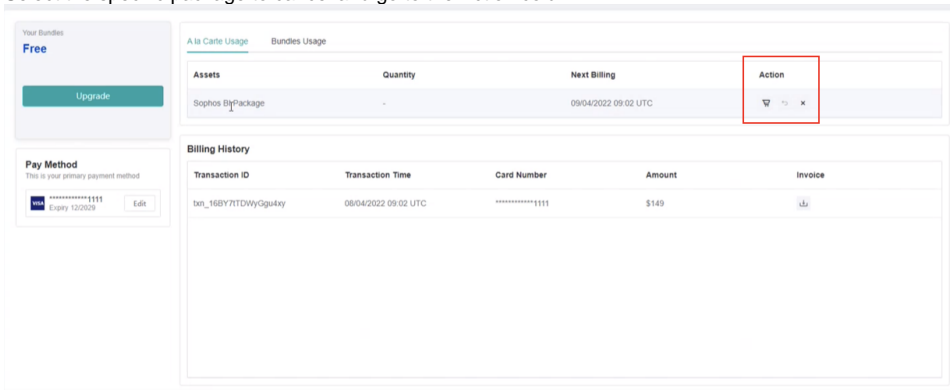
To download a copy of the invoice, click the download icon under the **Invoice** column.

Below is a sample invoice.

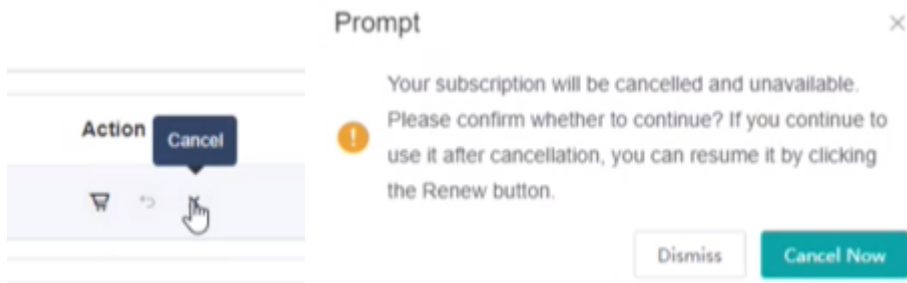


7. How to cancel an A la Carte Usage subscription

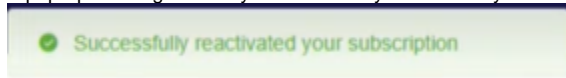
1. Go to the Billing page and click the **A la Carte Usage** tab.
2. Select the specific package to cancel and go to the Action column.



3. Click the **Cancel** icon then click **Cancel Now** when prompted.



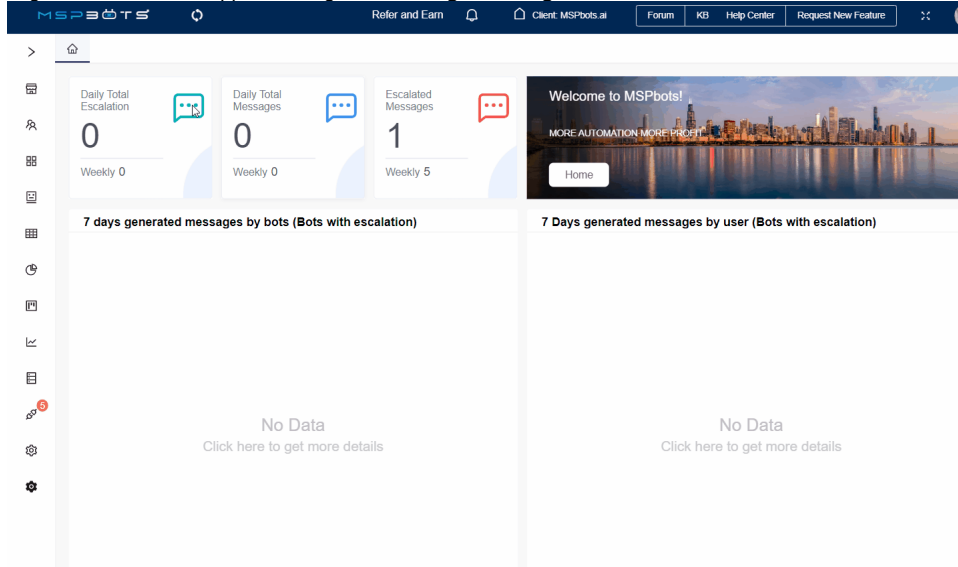
4. A pop-up message that says "Successfully reactivated your subscription" will appear to confirm the cancellation.



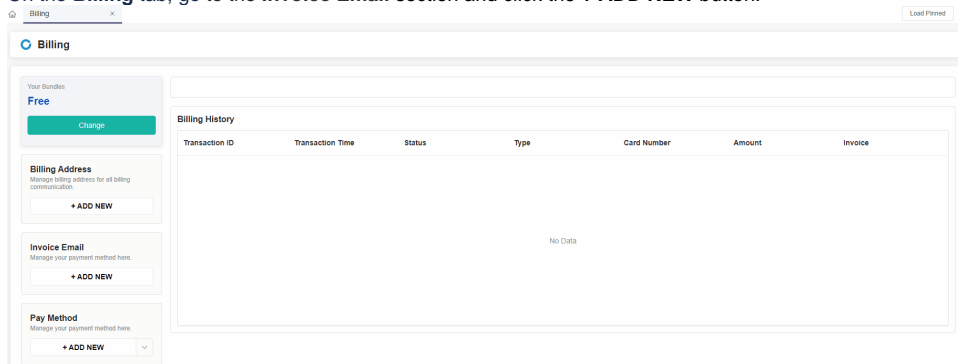
8. Adding a Billing Email Address

Follow these steps to change or add the billing email address that will receive invoices from Chargebee:

1. Log in to the MSPbots app and navigate to **Settings > Billing**.



2. On the **Billing** tab, go to the **Invoice Email** section and click the **+ ADD NEW** button.



3. In the **Invoice Email** pop-up window, enter your **Email Address**.

Invoice Email

* Email Address

Please Input

Cancel

Confirm

4. Click **Confirm** to add the billing email address and save it in the Invoice Email section. Chargebee will start sending invoices to this email.

Billing

Your Bundles

A la Carte

100 USD upcoming payment on Sep 16 2023

Change

Add more users

Billing Address

Manage billing address for all billing communication.

📍

ftb/sdf, dftbsdftb, Afghanistan

Invoice Email

Manage your payment method here.

✉️

ftb/sdf@mspbots.ai

Pay Method

Manage your payment method here.

Visa

*****1111

Expiry 12/2023

Primary

+ ADD NEW

A la Carte Usage

Assets	Quantity	Next Billing	Onboarding Services	Amount	Action
Bot Usage(Unlimited)	5	2023/09/16 11:51	-	100 USD	🗑️ ➡️ ✕
Automate BI Package	1	2023/09/16 11:51	-	100 USD	🗑️ ➡️ ✕

Billing History

Transaction ID	Transaction Time	Status	Type	Card Number	Amount	Invoice
ftb/sdf-1234567890	2023/08/17 02:28	SUCCESS	Card Payment	*****1111	100 USD	📄
ftb/sdf-1234567890	2023/08/17 11:09	SUCCESS	Card Payment	*****1111	100 USD	📄
ftb/sdf-1234567890	2023/08/16 06:23	SUCCESS	Card Payment	*****1111	100 USD	📄
ftb/sdf-1234567890	2023/08/16 02:24	SUCCESS	Card Payment	*****1111	100 USD	📄
ftb/sdf-1234567890	2023/08/16 11:51	SUCCESS	Card Payment	*****1111	100 USD	📄

9. Changing Your Billing Email Address

1. Navigate to **Settings** > **Billing** in the MSPbots app.

2. On the **Billing** tab, go to the Invoice Email section and click on **...** the ellipsis button to select **Edit**.

The screenshot shows the 'Billing' tab interface. On the left, there's a sidebar with sections: 'Your Botbot' (A la Carte Usage, 1000 upcoming payment on Sep 16, 2023, with 'Change' and 'Add more users' buttons), 'Billing Address' (Manage billing address for all billing communication, showing 'itf the botbot, @mspbots, Afghanistan'), 'Invoice Email' (Manage your payment method here, showing '@mspbots.ai'), and 'Pay Method' (Manage your payment method here, showing a masked card number). The main area has 'A la Carte Usage' and 'Billing History' tables.

Assets	Quantity	Next Billing	Onboarding Services	Amount	Action
Bot Usage(Unlimited)	5	2023/09/16 11:51	-		⌵ ⌵ ⌵
Automate BI Package	1	2023/09/16 11:51	-		⌵ ⌵ ⌵

Transaction ID	Transaction Time	Status	Type	Card Number	Amount	Invoice
...	2023/09/17 02:28	SUCCESS	...	*****1111		⌵
...	2023/09/17 11:09	SUCCESS	...	*****1111		⌵
...	2023/09/16 06:23	SUCCESS	...	*****1111		⌵
...	2023/09/16 02:24	SUCCESS	...	*****1111		⌵
...	2023/09/16 11:51	SUCCESS	...	*****1111		⌵

3. In the **Invoice Email** pop-up window, modify the billing **Email Address**.

The 'Invoice Email' pop-up window has a title bar with a close button. Below the title, there's a red asterisk followed by 'Email Address'. A text input field contains the email address '@mspbots.ai'. At the bottom, there are two buttons: 'Cancel' and 'Confirm'.

4. Click **Confirm** to keep the configuration.

10. Related Topics

- [How to Assign and Remove a Bot License](#)
- [MSPbots Pricing List](#)
- [Frequently Asked Questions on Bots Billing and Licenses](#)
- [How to Assign and Remove a License for NextTicket Manager](#)
- [How to Assign and Remove a License for Attendance Manager](#)