

# Contract & Service Billing

## Overview

Contract & Service Billing (CSB) for Infor SunSystems is designed for recurring contract invoicing, recurring service invoices and ad-hoc invoices. It delivers advanced functionality that works together with your business processes to remove manual tasks and increase data accuracy and speed.

### Reasons why you use CSB

#### ■ Repeat Billing

Designed for repeat billing and contract billing management. Allows users to automatically create repeat invoices at user defined billing cycles.

#### ■ Automatic Generation of Invoices

CSB automatically generates the contract invoices for each cycle and all attendant financial transactions. The generation can be a multi stage process with reviews at each stage to improve the quality and accuracy of the customer invoices.

#### ■ Pre-payments and Arrears Accruals

As contract line items can be billed in arrears or advance the automatic calculation of the prepayments or arrears saves time and eliminates errors.

#### ■ Improved Cash Flow

Improved cash flow is made possible by billing all contracts in a timely manner, not missing additional charges and producing customer defined invoice layouts. The contract invoices can then be followed up using Infor SunSystems Collect to ensure payment by due date.

#### ■ Contract Invoice Rollback

Often the users only see a contract error or change required after the pro-forma and final invoices have been run. CSB allows a user to roll back and apply any changes seamlessly. This improves customer services.

■ **Future dated charges cancelled and contract refunds**  
It is the exceptions that can hinder customer service, CSB contract refunds are automatic and simple. This process saves time and maintains data integrity.

#### ■ Contract line items can be added, cancelled or amended at anytime

Contracts allow for one off items such as administration fees. The contract line items cater for a start date and a charge frequency and, if needed, end dates.

#### ■ System of Internal Control

The system of internal control is adhered to by functional security on the menu options and data set security limiting data access. All contract changes are written to the audit log with pre and post image. With CSB your data integrity is not compromised.

#### ■ Different Billing Cycles

Often contracts contain many line items with different billing cycles. CSB ensures that the billing cycles are automatically catered for and correct journals are created.

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## Features at a glance:

### ■ Contract Invoices

- Generation of repeat invoices
- Bill in advance or arrears
- Rollback of contract invoices
- Contract start and end dates
- Contract review cycle with reminders
- Full contract audit history on all changes made
- Automated accrual of pre-payments and arrears
- Attach unlimited internal date stamped contract notes
- User definable field options for further contract amounts, descriptions or analysis
- Invoice layouts, set at contract level, can be different by contract by customer
- Attach any number of related documents to individual contracts for later perusal
- Attach any amount of free text
- Separate contract item frequency to contract billing cycle

### ■ Contract Items

- Grid or Tab view
- Price quantity bands
- Extra reference items and codes
- Long descriptions with formatting
- Unlimited calculation codes in a contract line
- Contacts and comments per contract line item
- User definable transaction and contract analysis codes
- Can have different start and end dates for contract items
- Different billing address assists with consolidated invoicing
- Price books' effective date control used to control overall price changes

### ■ Item Catalogues

- Billing frequency
- Unit of measure with minimum and maximum quantity
- Price set by fixed price or price books
- Date activated pricing
- Delayed billing starts
- Fixed period duration charging

### ■ Calculation

- Conditional pricing
- Manage price changes globally
- Special pricing for individual accounts
- User defined Boolean invoice value calculations
- Nested loops permit value breaks on any calculation
- Centrally controlled price maintenance with activated start and end dates

### ■ Ad-hoc Invoice Entry

- Account codes
- Create ad-hoc invoices
- Flexible invoice layouts
- Can use pre-defined invoice types
- Line items can be dissected across revenue
- Separate delivery address and invoice address
- Flexible invoice processing steps for separation of duties and audit control

### ■ General

- User defined start numbering
- User defined function and short cut keys
- Global, invoice group or type numbering
- User defined journal and ledger interface setups

### Industry

- Services Industry
- Specific Industries
  - Specific Industries
  - Aged Care
  - Contract Cleaning
  - Education
  - Local and State Government
  - Membership Organisation
  - Not for profit