

CSB (Contract & Service Billing)



Overview

Contract & Service Billing (CSB), is designed for recurring contract invoicing, recurring services invoices and ad-hoc invoices for SunSystems.

Why CFOs love CSB

- Full contract and recurring billing functionality
- Accrual of prepayments & arrears
- Revenue recognition of revenue over multiple periods
- Invoice and credit note approvals process
- Multi-currency

Why Accounts Receivable love CSB

- Integrates seamlessly with Collect for SunSystems
- Ability to email invoices
- Contract review reminders
- Rollback on contract invoices
- Bulk import from third party data sources
- Contracts can be amended at any time
- The sundry invoicing option offers a flexible option to produce ad-hoc invoices

Contracts

- Flexible billing intervals. CSB can be configured to bill daily, weekly, fortnightly, monthly, quarterly, semi-annually or annually
- A contract can cover any number of periods. CSB allows part periods for start and end periods
- Full revenue recognition capability gives the user control over the accounting
- Different initial and recurring amounts with pre-determined new amounts. This allows one off amounts such as set up fees.
- You can optionally have contract refunds
- Contracts can be billed in advance or arrears
- Line items can be added or suspended on existing contracts
- A schedule of contract review dates can be established
- A contract run can be rolled back due to any error and reapplied once the errors are corrected
- Price books can include uplifts for example CPI escalations
- Printing matrix allows mixture of contracts and invoice layouts

"CSB for SunSystems has enabled the front-line departments to get much more involved in the raising of invoices, resulting in their taking ownership of the debtors ledger. It's no longer seen as a purely back-office function."

Housing Association

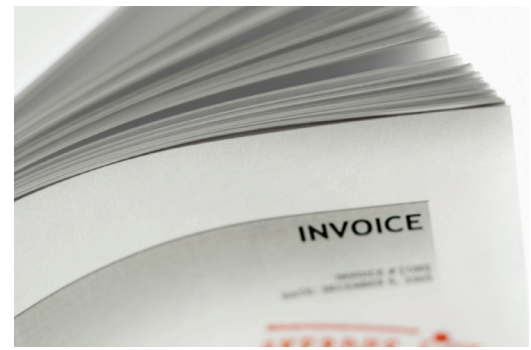
"The invoicing system works as it should. We've gained greater consistency and control of invoice generation in our business."

Financial Services

Industries

- Education
- Financial Services
- Hospitality
- Insurance
- Not for Profit
- Oil & Gas
- Portfolio Managers
- Retail
- Software authors and resellers
- Web hosting, ISP & web stores

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Collect integration

- You can set up CSB to automatically create a note in Collect when an invoice is generated and attach a copy of the invoice to the note
- From within Collect the user is able to drill down and review or reprint the CSB invoice

CSB quick overview

- **ACCRUAL** of payments & arrears
- **AUDIT** history
- **CALCULATION** and **CONDITION CODES** to cater for complex pricing structures
- **COMPREHENSIVE SECURITY**
- **CONTRACT REVIEW** schedule
- **CUSTOMISED BILLING** details
- **REVENUE RECOGNITION** to spread revenue over multiple periods
- **ROLLBACK** on contract invoices
- **PRICE BOOKS** allow for the automation of price changes
- **USER DEFINED** features – pricing structure- menus - screen views
- **COST EFFECTIVE**
- **EASY TO USE**

Features that make CSB powerful out of the box

- Real time integration with Infor FMS SunSystems.
- Ability to set up unlimited invoice types with different posting rules.
- Functional security to restrict access to admin functions.
- Importing invoice data from external sources.
- Ability to maintain multiple number sequences if there is a need to cater for multiple data sources.
- Multi-currency capability.
- Dependent on settings to optionally generate contract refunds.
- Price books allow for the automation of price changes and quantity pricing.
- Calculation and condition codes to cater for complex pricing structures.
- Powerful report writer for customisation of invoice layouts and custom reports.

"The project has certainly saved time in the back office and it's give us real time visibility into our invoicing."

Financial Services

CSB for Infor FMS SunSystems is compatible with

- SunSystems 4
- SunSystems 5
- SunSystems 6

RDBMS

- Microsoft SQL Server
- Oracle

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