

Subscription Billing

The subscription lifecycle made easy

Streamline the complete subscription lifecycle and escape the pain of using manual methods and disconnected applications. Built on the Salesforce1 Platform, Intacct Subscription Billing leverages Intacct's best-in-class revenue management capabilities. Automate billing, subscription changes, and revenue recognition to instantly boost the efficiency of accounting and sales teams. And use flexible pricing and accurate billing to more easily attract new customers and retain current ones.

Key benefits

Create accurate billing that's easy to manage—even as your company grows

No matter how your organization evolves or how quickly it grows, Intacct Subscription Billing automatically generates your company's billing, delivers customer invoices and statements, and then updates the accounting system. Reduce customer churn by triggering renewal orders as the end of the subscription period approaches, and make it easy for your salespeople to manage order changes—right from within Salesforce.

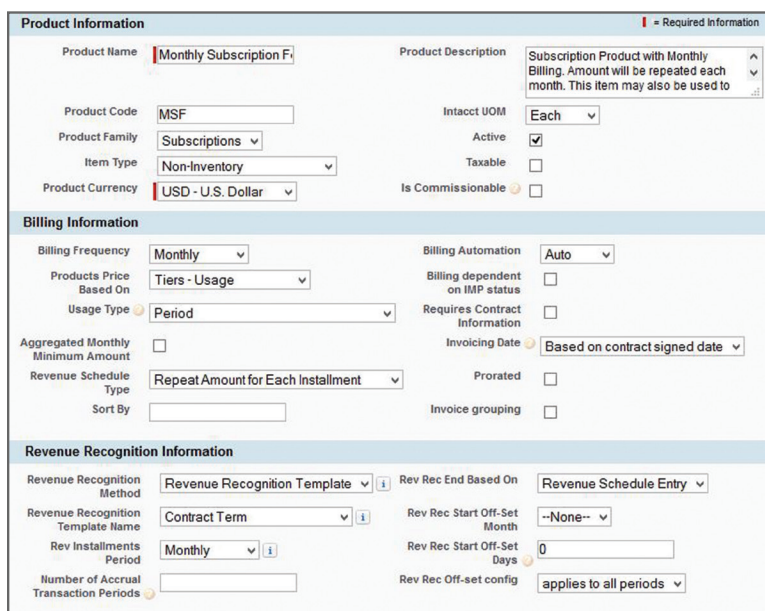
Design billing to meet customer wants—not system limitations

Create pricing and packaging (products and services) that entice and delight customers, and quickly deploy

new offerings and new revenue models as your business strategies evolve. You can manage one-time sales as easily as subscriptions, and employ usage billing and other pricing strategies that work best for your customers. Accept credit cards—and, with no additional steps, account for those payments within Intacct.

Leverage best-in-class revenue management capabilities

Ensure that you account for revenue under the appropriate recognition rules independent of billing and pricing terms, and automate the accounting for changes to subscription terms.



The screenshot displays the Intacct Subscription Billing configuration interface, organized into three main sections:

- Product Information:** Includes fields for Product Name (Monthly Subscription F), Product Code (MSF), Product Family (Subscriptions), Item Type (Non-Inventory), Product Currency (USD - U.S. Dollar), Product Description (Subscription Product with Monthly Billing...), Intacct UOM (Each), Active (checked), Taxable (unchecked), and Is Commissionable (unchecked).
- Billing Information:** Includes Billing Frequency (Monthly), Products Price Based On (Tiers - Usage), Usage Type (Period), Billing Automation (Auto), Billing dependent on IMP status (unchecked), Requires Contract Information (unchecked), Invoicing Date (Based on contract signed date), Aggregated Monthly Minimum Amount (unchecked), Revenue Schedule Type (Repeat Amount for Each Installment), Prorated (unchecked), Sort By (empty), and Invoice grouping (unchecked).
- Revenue Recognition Information:** Includes Revenue Recognition Method (Revenue Recognition Template), Revenue Recognition Template Name (Contract Term), Rev Installments Period (Monthly), Number of Accrual Transaction Periods (empty), Rev Rec End Based On (Revenue Schedule Entry), Rev Rec Start Off-Set Month (--None--), Rev Rec Start Off-Set Days (0), and Rev Rec Off-set config (applies to all periods).

Quickly set up new offerings in Salesforce with billing and accounting automatically handled within Intacct.

Key features

Billing

Invoice and statement generation and delivery: Automatically generate and send invoices—which you can manually select—and usage statements.

Flexible billing frequency: Choose from term-based and evergreen billing frequencies—including one-time, monthly, quarterly, semiannual, annual, and milestone billing—and automate accrual accounting entries for billing in arrears.

Indirect billing: Indirectly bill distributors and resellers. Consolidate customer subscriptions in one reseller invoice while retaining separate customer and reseller information for reporting and taxes.

Billing in multiple currencies: Bill in multiple currencies and across multiple operating entities.

Automatic price increases: Apply percentage-based CPI price increases to renewals using contract, list, or manually defined prices. Assign rules to automatically phase out discounts over time.

Sales tax management: Easily streamline sales tax compliance with the AvaTax for Intacct module, a comprehensive sales tax solution jointly developed with Avalara.

Usage billing

Usage-based billing calculation: Import usage records from internal systems—via CSV import or API integration—and automatically calculate invoice amounts based on actual usage or contracted minimums.

Tiered usage pricing: Define prices based on usage tiers, which are independent of contracted minimums.

Order management

Automatic renewals: Automatically generate fixed term, repeating fixed term, and evergreen renewals.

Revenue recognition accounting: Automatically capture new subscription contract details to account for revenue under the appropriate recognition rules, independent of billing and pricing terms.

Subscription change management: Easily change subscription terms—such as add-ons, change orders, and cancellations—directly in Salesforce without worrying about the underlying billing and accounting complexities, which are handled downstream.

Electronic payments: Automatically charge customers electronically when payment is due. Capture and tokenize credit card information; authorize, release, and charge credit cards; and associate payment profiles with subscriptions and automatically apply payments within Intacct.

Flexible discounting: Choose from multiple discount methods—such as percentage-based or free months—and apply free months to a contract at the period's start or end, or extend contract terms to accommodate free months.

Take the next step

Find out how Intacct best-in-class cloud financials streamline operations and provide real-time insights, boosting productivity and growth.



www.qisolutions.co.za



+27 87 750 8185



info@qisolutions.co.za

