

Recurring Contract Billing

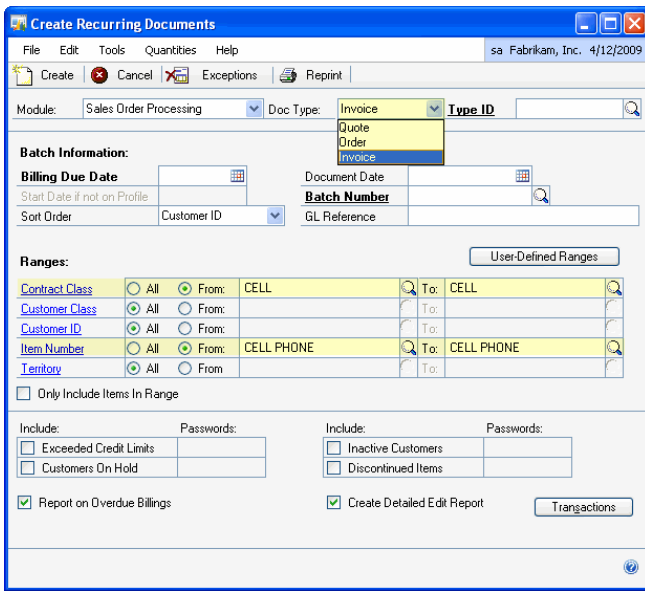
Take control of your billing processes

How effectively do you manage your cyclical billing processes?

Recurring Contract Billing, a **'Timeless Treasure'** from Encore Business Solutions, helps organizations automate and manage customer contracts, quotes, orders and invoices.

Perform *large or small billing runs* in 3 simple steps:

*Step (1): Create and maintain specific customer contract items in the **Contract Entry** window with different billing dates and frequencies.*



Create Recurring Documents

Module: Sales Order Processing | Doc Type: Invoice | Type ID: [dropdown]

Batch Information:

Billing Due Date: [calendar] | Document Date: [calendar]

Start Date if not on Profile: [calendar] | Batch Number: [input]

Sort Order: Customer ID | GL Reference: [input]

Ranges:

Contract Class: All | From: CELL | To: CELL

Customer Class: All | From: [input] | To: [input]

Customer ID: All | From: [input] | To: [input]

Item Number: All | From: CELL PHONE | To: CELL PHONE

Territory: All | From: [input] | To: [input]

Only Include Items In Range

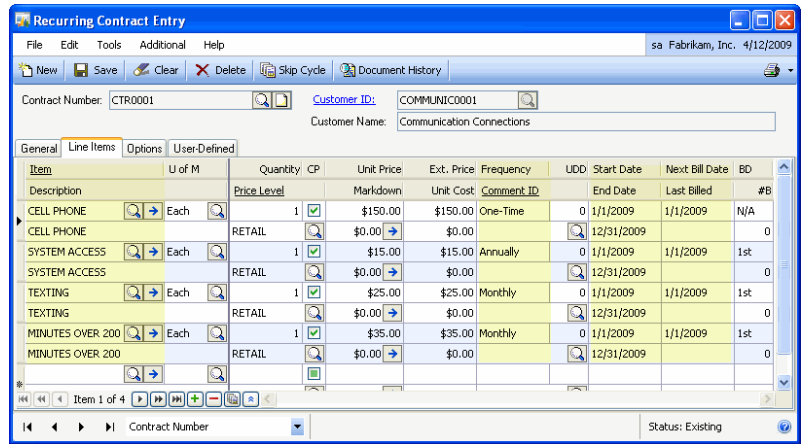
Include: Exceeded Credit Limits | Customers On Hold | Inactive Customers | Discontinued Items

Report on Overdue Billings: | Create Detailed Edit Report: | Transactions: [button]

*Step (2): Specify what records to select in the **Create** window.*

Once the Recurring Contract Billing batch has completed creating the documents, follow standard Microsoft Dynamics™ GP functionality for your Quotes, Orders or Invoices.

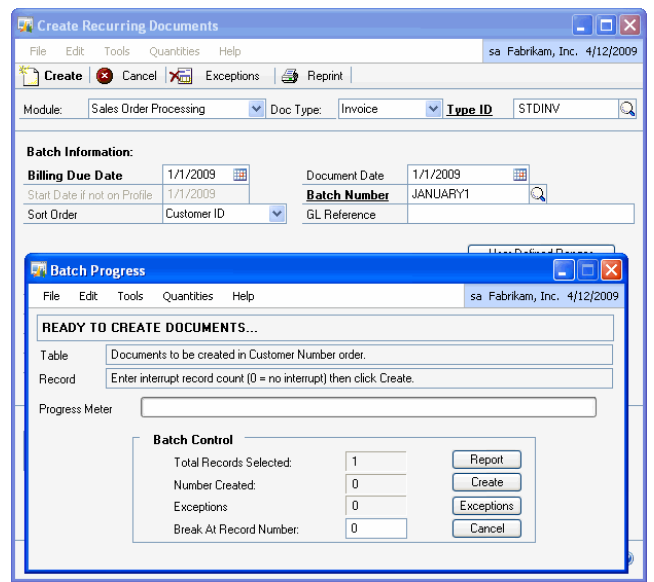
Step (3): Generate a batch of Quotes, Orders or Invoices in Sales Order Processing.



Recurring Contract Entry

Contract Number: CTR0001 | Customer ID: COMMUNIC0001 | Customer Name: Communication Connections

Description	U of M	Quantity	CP	Unit Price	Ext. Price	Frequency	UDD	Start Date	Next Bill Date	BD
CELL PHONE	Each	1		\$150.00	\$150.00	One-Time	0	1/1/2009	1/1/2009	N/A
CELL PHONE	RETAIL			\$0.00	\$0.00			12/31/2009		0
SYSTEM ACCESS	Each	1		\$15.00	\$15.00	Annually	0	1/1/2009	1/1/2009	1st
SYSTEM ACCESS	RETAIL			\$0.00	\$0.00			12/31/2009		0
TEXTING	Each	1		\$25.00	\$25.00	Monthly	0	1/1/2009	1/1/2009	1st
TEXTING	RETAIL			\$0.00	\$0.00			12/31/2009		0
MINUTES OVER 200	Each	1		\$35.00	\$35.00	Monthly	0	1/1/2009	1/1/2009	1st
MINUTES OVER 200	RETAIL			\$0.00	\$0.00			12/31/2009		0



Create Recurring Documents

Module: Sales Order Processing | Doc Type: Invoice | Type ID: STDINV

Batch Information:

Billing Due Date: 1/1/2009 | Document Date: 1/1/2009

Start Date if not on Profile: 1/1/2009 | Batch Number: JANUARY1

Sort Order: Customer ID | GL Reference: [input]

Batch Progress

READY TO CREATE DOCUMENTS...

Table: Documents to be created in Customer Number order.

Record: Enter interrupt record count (0 = no interrupt) then click Create.

Progress Meter: [progress bar]

Batch Control

Total Records Selected: 1 | Report: [button]

Number Created: 0 | Create: [button]

Exceptions: 0 | Exceptions: [button]

Break At Record Number: 0 | Cancel: [button]

Recurring Contract Billing seamlessly integrates with Microsoft Dynamics GP.

Recurring Contract Billing

*Solutions for
Microsoft Dynamics GP*

Flexible

- Consolidate contract details on one contract for ease of maintenance
- Choose from 9 different billing frequencies on every line item
- Manage multiple billing cycles on one contract
- Allow credit or discount line items
- Allow line item price overrides by checking the **Contract Price (CP)** box
- Integrate with Microsoft Dynamics GP **Electronic Funds Transfer (EFT) for Receivables** or fully integrated credit card applications
- Mark the check box for **Rollback** functionality to delete or void incorrect documents and return the contracts to their original state

Speed

- Enter non-inventory items on the fly
- Edit auto-fill defaults from previous line
- Edit contracts directly in the **Contract** window with the line editing functionality
- Advanced scrolling options for improved user experience
- Print legal contracts ready for customer acceptance of services and fees
- Continue to create contracts during batch processing
- Create quotes, orders and invoices in **Sales Order Processing**

Control

- Monitor contract expiry dates, next bill dates and proactively negotiate contract renewals
- Manage contracts with flexible parameters using variable billing and revenue recognition options
- Recognize revenue evenly over a predefined period using the **Deferral Profile Group**
- Record locking prevents another user from editing contracts already in-use
- Leverage Microsoft Dynamics GP **Security** to activate passwords for customers whose account is on hold and/or inactive
- Automate invoice procedures and define batch contract billing cycles by selecting from options such as customer ID, inventory or non-inventory items and billing parameters

Encore Business Solutions: Experience, Quality and Trust Since 1990

Encore remains committed to serving the Microsoft Dynamics community by developing high quality products and providing exceptional customer service. We continue to expand our reach, maintain our reputation and strive to provide value in everything we do. Our products are designed to extend the functionality of Microsoft Dynamics GP, offering productivity gains, flexibility and stability for growth and success.