



CSB (Contract & Service Billing) *for Infor SunSystems*

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



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.

CSB for Infor FMS SunSystems is compatible with

- SunSystems 4
- SunSystems 5
- SunSystems 6

RDBMS

- Microsoft SQL Server
- Oracle

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

Financial Services