Sage Intacct

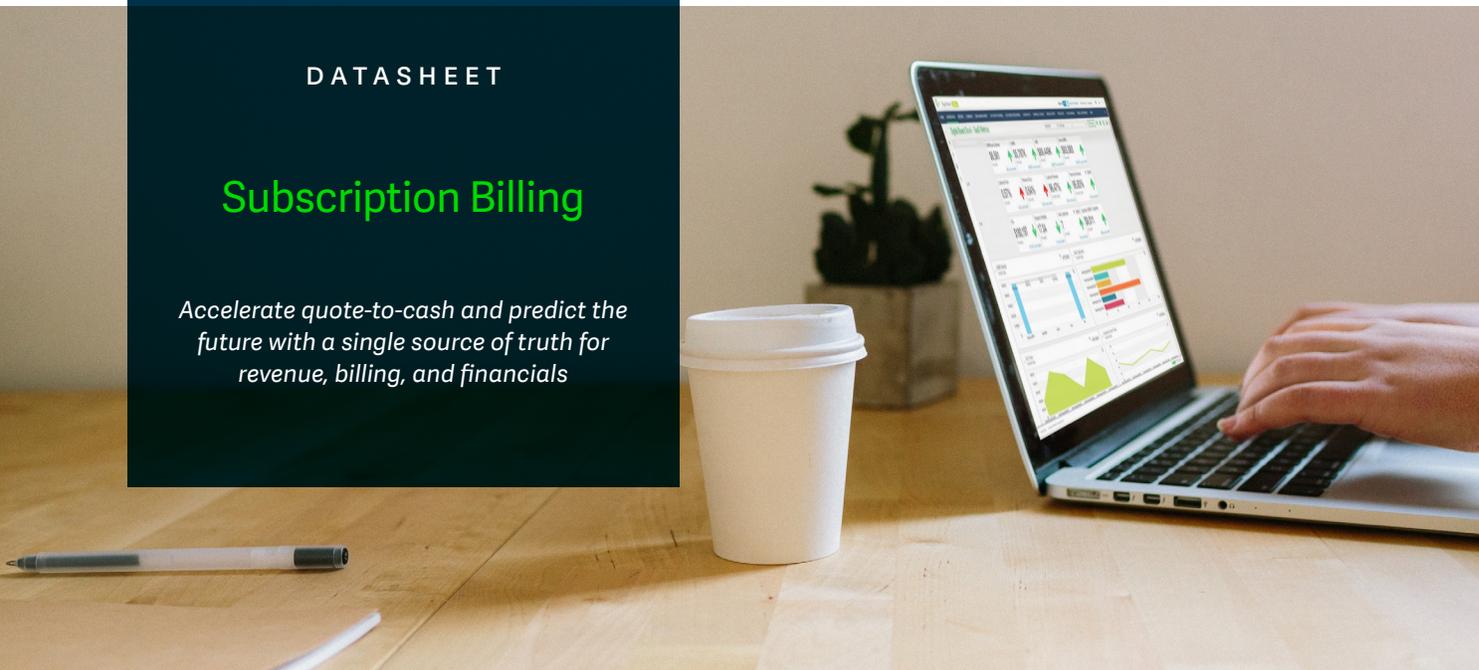## Subscription Billing

Accelerate quote-to-cash and predict the future with a single source of truth for revenue, billing, and financials

Growing revenue with flexible pricing models just got easier. Accelerate your quote to cash by using Sage Intacct's flexible, contract-based financial solution to manage and automate billing, revenue recognition, forecasting, and SaaS metrics. With a single system of record, natively integrated to Salesforce, you'll save time calculating, reconciling, and aggregating data. As a result, you'll be able to bill faster to turn sales into cash regardless of your business model.

Accelerate quote to cash by 30%

Don't let billing complexity stand in the way of adopting new pricing models that can grow your business. Eliminate manual calculations with built-in fixed price, usage based, and tiered pricing and billing. With automated pricing models and billing templates that match your business, you can "set it and forget it." You get bills out faster, decrease days sales outstanding, and free up cash to grow your business.

Manage the customer lifecycle

By driving your billing, revenue, and financials from a single source—the contract—you can manage a single revenue stream and automatically recognize revenue throughout the customer lifecyle. Contract changes, including renewals, upsells, downsells, and holds, drive automatic updates to revenue recognition, billing, and your financials so that they are aligned. You save time, eliminate errors, and reduce confusion.

Stay up to date on your financial relationship with the customer

Real-time, bi-directional synchronization between Salesforce and your financials allows you to maintain templates and schedules in your financial solution while maintaining customers, contracts, changes, and renewals in Salesforce. Billing and payments are easily visible to salespeople all in one place—the contract. Everyone stays up to date with your customers' financial relationship to provide a more consistent customer experience.

Forecast and get SaaS metrics in real-time

When everything you need to forecast is in one place and derived from the contract master and schedules, it's easy to automate forecasting and see cash, revenue, and billing throughout the lifecycle. Skip the spreadsheets and get real-time forecasts and SaaS metrics, including economic unit, to inform your decisions.

Forecast billing

Forecast - Billing By Customer   Customize | Graph | View | Print | Process & store | Email | Add to dashboard | Memorize | Export | Excel

Subtotal name / Contract ID	Contract Name	Product	2017/01	2017/02	2017/03	2017/04	2017/05	2017/06	2017/07	2017/08	2017/09	2017/10	2017/11	2017/12	2018/01+	2019/01+	Total
▼ IA Customer A, Subscriptions																	
CON-0049	IA Customer A - 3 Yr Contract with Annual Subscription and One Time Implementation Fees	Subscription	12,000.00												24,000.00	12,000.00	36,000.00
Sum for IA Customer A, Subscriptions			12,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	24,000.00	12,000.00	36,000.00
Sum for IA Customer A			12,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	24,000.00	12,000.00	36,000.00
▼ IA Customer B, Subscriptions																	
CON-0050	IA Customer B - 1 Yr Contract Billed Monthly with Add-On and Renewal	Subscription - Users	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00			12,000.00
CON-0050	IA Customer B - 1 Yr Contract Billed Monthly with Add-On and Renewal	Subscription - Users							600.00	600.00	600.00	600.00	600.00	600.00			3,600.00
Sum for IA Customer B, Subscriptions			1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,600.00	1,600.00	1,600.00	1,600.00	1,600.00	1,600.00	0.00	0.00	15,600.00
Sum for IA Customer B			1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,600.00	1,600.00	1,600.00	1,600.00	1,600.00	1,600.00	0.00	0.00	15,600.00
▼ IA Customer C, Usage																	
CON-0051	IA Customer C - 2 Yr Contract Billed Monthly for Minimum and Overage (Usage)	Usage	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	12,000.00		24,000.00
Sum for IA Customer C, Usage			1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	12,000.00	0.00	24,000.00
Sum for IA Customer C			1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	12,000.00	0.00	24,000.00
▼ IA Customer E, License																	
CON-0053	IA Customer E - 1 Yr Contract Bundle (Perpetual License and Support) - MEA	Perpetual License	10,000.00														10,000.00
Sum for IA Customer E, License			10,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10,000.00
Sum for IA Customer E			10,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10,000.00
▼ IA Customer F, Subscriptions																	
00000115	IA Customer F - 2 Yr Contract Billed Quarterly with One Time Implementation Fees	Subscription			3,000.00			3,000.00			3,000.00			12,000.00			21,000.00
Sum for IA Customer F, Subscriptions			0.00	0.00	3,000.00	0.00	0.00	3,000.00	0.00	0.00	3,000.00	0.00	0.00	12,000.00	0.00	21,000.00
Sum for IA Customer F			0.00	0.00	3,000.00	0.00	0.00	3,000.00	0.00	0.00	3,000.00	0.00	0.00	12,000.00	0.00	21,000.00
Sum Total			24,000.00	2,000.00	2,000.00	5,000.00	2,000.00	2,000.00	5,600.00	2,600.00	2,600.00	5,600.00	2,600.00	2,600.00	48,000.00	12,000.00	106,600.00

Generate real-time billing forecasts at any time.

Automate subscription billing

Flexible pricing models
- Fixed price
- Usage pricing
- Tiered pricing
- Price per thousand
- Discount tiers
- Minimum flat fees
- Included units
- Overages
- Customer specific

Consolidated billing
- Aggregate fixed price, usage based, and project based billing into one invoice

Billing approaches
- One-time
- In advance
- In arrears
- Every invoice

Billing and renewals automation
- Automated billing schedules—monthly, annually, custom, non-linear
- Bill by customer group
- Automatic renewals
- Copy existing contracts
- Contract change automation and scheduling
- Process in multiple currencies

Seamless quote-to-cash
- Native Salesforce integration
- Drive downstream revenue recognition, including multi-element arrangements and fair pricing requirements
- Sales visibility into invoices and payments
- Maintain renewals and changes in Salesforce
- Maintain accounting treatment in Sage Intacct

Seamless general ledger posting
- Automatically generate posts to the GL
- Easy drill-down and investigation from GL into the sub-ledger
- Slice and dice data by dimensions
- Maintain compliance with audit trails and compliance checklist

Insights
- All billing, revenue, and expense in one place
- Forecast billing, payments, and revenue across deferred and accrued revenue
- Unified reporting on billing and accounting
- Board-ready insights, including churn, CLV, CMRR, cash, CAC, and economic unit

Real-time Tax
- Exclusive tax

To learn more about how Sage Intacct can help you grow your SaaS business, visit: https://www.sageintacct.com/subscription-management-software or contact us at 877-968-0600.

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