SDM PlanGrid Proposal

Goals:

1. Consolidate Customer Invoices
2. Automate Billing Schedules
3. Automate Calculating Pro-Rated amounts
4. Re-Design Invoices to make billing paginated and clear to the customer

Current Process

1. Review Sales Force opportunities
2. “Installment Payments” checkbox set to T in SF (without this check it auto generates Invoice since there is no service contract)
3. Celiego brings SF opportunities to NS as a Sales Order (Pending Fulfill status)
4. PlanGrid team manually creates billing schedules for each line item
5. Customer gets billed for the first Invoice OK, but following Invoices cause confusion because now the SO for the next month doesn’t match the following Invoice.
6. Also, the customer is getting Multiple Invoices per month because of the terms.
7. Customer frustrated

Proposed Process

1. A billing schedule will be created for each line item upon save ( and line items added that day will also get their own billing schedule)
2. A combination of WorkFlow & SuiteScripting will be done to achieve this
3. Invoices will be created and/or consolidated by nightly scheduled script and customer will receive 1 Invoice per month.
4. All Invoices will be paginated and include all billing dates and terms for all items for that specific year only. (statements can be included to show billing for everything)

SDM Internal Notes & Thoughts:

* Currently they use Sales Force, NetSuite, and Excel to accomplish their billing
* I believe we need some actual example transactions where they experience problems to think-through this solution correctly.
* Automate Billing Schedules
  + Calculate Pro-rated amount by Day
  + Pro-Rate calculation = Total Order Amount - Annual Rate
  + They have the Revenue Recognition module
  + the Adv. Billing would handle automatic creation of Invoices. (I didn’t think they said they have this, would that mean we need a nightly scheduled script to create the Invoices?)
* Clear up Invoices to customer
* Determine Script-only, WorkFlow, or Hybrid approach
* Sending Statements out with Invoices? How else to consolidate customer Invoices?
* Should we demo out a process in Honeycomb/Professional Services?
* They want the first Invoice to have ONLY 1st year’s dates with pro-rated amounts
* Revenue Recognition = start & end dates of contract
* Should the customer only have 1 Sales Order per month, so each thing purchased is added as a line item on one Sales Order / month? OR should there be multiple Sales Orders and we consolidate all the Invoices into 1 for the month? Im not sure about what makes the most sense here.
* Any questions on how to calculate the pro-rated amount or any pitfalls to be aware of in this process?
* How do the terms play into the Invoices along with the billing schedule?