

# **LogiSense Recurring Invoice Template (Phase 1 for UK)**

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## Overview

The objective of the invoice template is to provide information about business and customer contact information with the breakdown of costs that show prices/charges and other information as needed for UK customers as part of the phase 1 release.

## Goal

- Phase 1: To develop the invoice template that Logisense will use to send out invoices to UK customers

## Requirements (for single invoice customers)

The requirements for invoice templates can be divided into 3 sections.

- Invoice Header
- Invoice Body
- Invoice Footer

### Invoice Header

The Invoice header should contain the below fields or sections

- Logo and the word "Invoice"  
The 8X8 team should be provided with the capability to upload the logo which would then show up on the invoices.
- Corporate address  
*This section should contain the corporate address and phone number. The address is given below:*  
**8x8 UK Limited**  
**Oxford House**  
**Bell Business Park**  
**Aylesbury**  
**HP198JR**
- Invoice #
- Invoice Date (format: DD-Month-YYYY, Eg: 3-Sep-2022)
- Due Date (format: DD-Month-YYYY, Eg: 3-Sep-2022)
- FIRST ROW after the HEADER

## ● BILL TO

This section should be populated with the Billing Account Name, Billing Account ID and Billing Address of the customer

- The Customer TAX ID needs to be displayed under BILL TO address. It should appear based on conditions. If the field value is there, have that displayed. If not, do not display.

## ● REMIT TO

*This section is to be populated with the REMIT to address information if **not** an autopay customer. This section should be made configurable (address) based on the location (US, UK, CAD). The Remit To address is given below:*

*Account Name: 8x8 UK Limited*

*Account No: 75044952*

*IBAN: GB21 HBUK 4038 0475 0449 52*

*BIC/SWIFT CODE: HBUK GB 4B*

*Sort Code: 40-38-04*

*Bank Information: HSBC Bank Plc*

*26 Broad Street*

*Reading*

*Berks. RG1 2BU*

*Send payment remittance advice to CashAppUS@8x8.com*

- The 8x8 TAX IDs need to be displayed. The Tax 8x8 TAX IDs need to be based on the 8x8 billing entity

For 8x8 Inc.

- Canada BN GST 874256746
- Quebec QST 122063300

For 8x8 UK Limited.:

VAT Reg No. GB 837 7504 04

SECOND ROW after the HEADER

## ● INVOICE SUMMARY

The applicable fields need to be shown. We will have sub-sections underneath the INVOICE SUMMARY. For example, if the customer does not have Device Charges, they should not be displayed as part of the INVOICE SUMMARY section. This section should change dynamically based on what we are charging the customer.

**-Service Charges**

**-Device Charges**

**-Usage Charges**

**-Other Charges**

**-8x8 Fees**

*Note: (We will still show this if there are any regulatory fees if the customer has got US or CANADA locations). This section will include E911 and RRF (any service of category Fee).*

**-Taxes and Surcharges**

*Note: This will be everything that comes as part of the TAX call and in the case of the UK, it's the 20% VAT we are charging. For the US, it's all the taxes broken down by TAX categories. Rules will be shared with Logisesnse (US, not in scope for phase 1)*

**-Total Amount**

- **BILLING PERIOD**

Based on conditions the below fields will be populated.

1. Service Period
2. Usage Period  
If a usage fee is charged
3. Payment Terms

*Note: Payment Terms will depend on the terms available to the customer. The payment method needs to be hidden on the invoice but the verbiage should be displayed based on the payment method*

4. PO Number  
PO Number: Needs to be displayed under the field "Payment Terms" if the field is filled with value. The field should not be displayed if there is no PO number. This field to be displayed on both recurring and order pdfs
5. In the BILLING PERIOD Section, the Payment Method Line should display:
  - a. "Invoice" when there is no payment method.
  - b. "Credit Card" when the payment method is credit card.
  - c. "Direct Debit" when the payment method is Direct Debit.


6. The message under the BILLING PERIOD section will vary by Payment method.

For autopay customers please use the below verbiage:

*Your payment will be deducted from the saved payment method on the account*

For customers with no payment method, we don't need verbiage as we are displaying a message under the REMOT TO address and for now, that will suffice.

A question here. How Logisense would identify if the order invoice is on autopay? Is that using the custom field "Autopay Customer"

 <b>Invoice</b>		Invoice # <b>2000018871</b> Invoice Date <b>14-Oct-2022</b> Due Date <b>13-Nov-2022</b>	
<b>BILL TO</b> <b>INTERACTIVE INVESTOR SERVICES LIMITED</b> Exchange Court Leeds LS1 4AX GBR		<b>REMIT TO</b> 8x8 UK Limited Oxford House Bell Business Park Aylesbury HP19 8JR  VAT Reg No. GB 837 7504 04	
<b>INVOICE SUMMARY</b>		<b>BILLING PERIOD</b>	
Service Charges	(£ 185,978.47)	Service Fees	05-Sep-2022 - 03-Aug-2023
Usage Charges	£ 204.28	Usage Fees	02-Aug-2022 - 08-Oct-2022
8x8 Fees	(£ 168.89)		
Taxes and Surcharges	(£ 37,185.98)	Customer Number	UK-781
<b>Total Amount:</b>	<b>GBP (£ 223,129.06)</b>	Payment Terms	Net 30
		Payment Method	Invoice
		<b>PO Number</b> Please send your payment to the 8x8 address above.	

## Invoice Body

The Invoice body is to contain 5 rows/sections

### SERVICES

- *Services to include all services that have a recurring charge, or prepaid usage.*
- *The services will be aggregated by Product and by dates of service. Thus services added, services dropped and continuing services will be on separate lines.*
- *Partially billed services have a footnote explaining that the services are prorated (refer to the last section of the document).*
- *If billed for the exact bill period, do not display dates against the description on each line*
- *The lines are to be populated with dates ONLY IF the customer is billed for "more than or less than the billing period"*

SERVICES				
Description	Days Billed	Quantity	Unit Price	Total
Additional Local Number (04-Oct-2022 - 10-Oct-2022) <sup>1</sup>	7	2	(£ 3.74)	(£ 3.74)
Additional Local Number (04-Oct-2022 - 10-Oct-2022) <sup>1</sup>	7	1	(£ 0.93)	(£ 0.93)
Additional Local Number (04-Oct-2022 - 10-Oct-2022) <sup>1</sup>	7	10	(£ 4.70)	(£ 4.70)
Additional Local Number (04-Oct-2022 - 10-Oct-2022) <sup>1</sup>	7	10	(£ 4.70)	(£ 4.70)
CC X Series Call Recordings Cold Storage (04-Oct-2022 - 10-Oct-2022) <sup>1</sup>	7	30	(£ 13.80)	(£ 13.80)
CC X Series Call Recordings Cold Storage (04-Oct-2022 - 10-Oct-2022) <sup>1</sup>	7	13	(£ 5.98)	(£ 5.98)
CC X Series Call Recordings Cold Storage (04-Oct-2022 - 10-Oct-2022) <sup>1</sup>	7	8	(£ 2.32)	(£ 2.32)

*Example with the exact bill period (with no dates populated)*

SERVICES				
Description	Days Billed	Quantity	Unit Price	Total
X Series - X1 GB	30	1	£ 10.00	£ 10.00
<b>Total</b>				£ 10.00

## DEVICES

- Any recurring devices need to be displayed under this section and non-recurring ones under the section "OTHER CHARGES"
- The devices section includes all EPP and Flex device subscriptions. The structure and requirements for this section are similar to those for Services.
- Note: Devices purchased outright do not show up in this section. The one-time charges for that will be part of the order invoice.

DEVICES				
Description	Days Billed	Quantity	Unit Price	Total
Polycom IP 5000 Flex (22-Dec-2020 - 16-Jan-2021) <sup>1</sup>	26	1	\$ 11.45	\$ 11.45
Polycom VVX 301 (21-Dec-2020 - 16-Jan-2021) <sup>1</sup>	27	1	\$ 5.05	\$ 5.05
<b>Total</b>				<b>\$ 16.50</b>

## USAGE

- Summarized categories of any types of usage like Calls, Toll-Free, Recording, storage, SMS, VCC, and transcripts. There will be 6 lines based on the usage the customer got
- The usage section summarizes all **charged** usage by usage category.

USAGE		
Description	Usage Quantity	Total
Calls	22628 Mins	£ 63.39
Virtual Contact Center (VCC)	23728 Mins	£ 0.00
<b>Total</b>		<b>£ 63.39</b>

- OTHER CHARGES**



Any charges that do not fall as part of any other sections. 1/31: Any devices we built the customer for the outright purchase (like one-time charges)

OTHER CHARGES			
Date	Description	Reference	Total
07-Feb-2022	Polycom VVX 311 w/ vqmon - PoE, No AC Power Supply		\$ 135.00
07-Feb-2022	Polycom VVX 311 w/ vqmon - PoE, No AC Power Supply		\$ 135.00
07-Feb-2022	Polycom VVX 311 w/ vqmon - PoE, No AC Power Supply		\$ 135.00
07-Feb-2022	Shipping Charges		\$ 24.78
07-Feb-2022	Polycom VVX 311 w/ vqmon - PoE, No AC Power Supply		\$ 135.00
07-Feb-2022	Polycom VVX 311 w/ vqmon - PoE, No AC Power Supply		\$ 135.00
<b>Total</b>			<b>\$ 699.78</b>

## 8X8 FEES

- The E911/RRF fee is shown as part of this section

8x8 FEES	
Description	Total
MISC: E911 SERVICE	(£ 2.66)
MISC: REGULATORY RECOVERY FEE - X Series - X1	(£ 1.70)
MISC: REGULATORY RECOVERY FEE - X Series - X4	(£ 1.36)
MISC: REGULATORY RECOVERY FEE - X Series - X7	(£ 1.70)
<b>Total</b>	<b>(£ 7.42)</b>

## TAXES & SURCHARGES

- This section will include all taxes and fees, aggregated by type

<b>TAXES &amp; SURCHARGES</b>	
<b>Description</b>	<b>Total</b>
NY State and Local Sales Tax	£ 59.02
NY State & Local 911	£ 8.00
FEDERAL UNIVERSAL SERVICE FUND	£ 15.68
LOCAL GROSS RECEIPTS TAX	£ 6.78
NY MTA SURCHG ON EXCISE TAX	£ 1.85
NY STATE EXCISE TAX	£ 7.46
UK VAT 20%	£ 202.47
<b>Total</b>	<b>£ 301.26</b>

## Invoice Footer

The information block on the invoice should be made configurable so that based on the template it can change. Based on the Payment Method of the invoice, the footer should change.

1. **Information block on E911/RRF:** Information block on E911/RRF needs to be included on all invoices where E911 / RRF has been charged due to the customer having services with a US or Canada-based service address. If the section “8x8 Fees” on the invoice is populated, then the message block should appear. If the section is suppressed, then the message block should also be suppressed.

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**Regulatory Recovery Fee (RRF):** As a provider of a public communications service in the US and Canada, we are required to make contributions to government programs and funds, comply with regulations relating to universal and number portability (among others), file periodic reports with the FCC (in the US) and respond to law enforcement and other official requests relating to the traffic on our network. We charge the RRF for complying with communications regulations. This is not a government-mandated charge.

**Universal Service Fund (USF):** We charge the USF surcharge to recover our contribution to the US federal Universal Service Fund. These contributions are mandatory for all telecommunication service providers, and it is customary industry practice for providers to pass-through these contributions to their Customers.

**E911 Service Fee:** E911 service is required by law on all voice and fax services in the US and Canada. We charge the E911 Service Fee to provide E911 service. This is not a government-mandated charge.

**E911 Surcharge /Tax:** Some states and provinces assess E911 and/or 911 taxes on telecommunications services to support local emergency services programs. These are taxes that we are required to collect from our customers and pass on to the applicable taxing authority.

**State, Local, Other Taxes and Surcharges:** These taxes are imposed on us by state (US) or provincial (CAN), local, and municipal governments. Applicable taxes are determined based on the customer's ship-to or service address(es).

## 2. Billing contact information

The billing support contact information provided on the Invoice pdf should be the same for all the payment methods. Below is the verbiage and should be configurable:

*A detailed breakdown of your invoice charges can be found by logging into your account at <https://8x8.force.com/s/billingstatementspage>*

*please open a Billing Support case in your Admin Console*

*<https://8x8.force.com/s/createcase> or call 888-898-8733*

## 3. If the service charge is prorated, the invoice footer to display the below message:

1. Services that were added to the account during the month are billed at an amount prorated for the number of days those services were on the account.

8x8 invoice

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*Services that were added to the account during the month are billed at an amount prorated for the number of days those services were on the account*