



Recurring Revenue Management

Automate recurring billing, payments, and collections to significantly improve business performance. Apply billing and revenue recognition schedules by month, quarter, or yearly as well as customized time-periods, even mixed on the same contract.

- **Flexible pricing for digital licenses and subscriptions**
- **Adjust billing contracts and revenue recognition schedules**
- **Automate contract renewals and activities**
- **Use billing rules to define templates for billing, revenue recognition, and allocation**

Key business benefits

- Gain real-time visibility into revenue and projected revenue with forecasts and reports.
- Create predictable revenue flow and improve customer service by minimizing billing errors.
- Apply billing and revenue recognition schedules by month, quarter, or year, as well as by customized time periods.
- Mix time periods on contracts.

Maximize Revenue Opportunities and Cash Flow, Improve Customer Service

By using Acumatica ERP contracts, you can bill customers recurrently and configure different combinations of terms and services to satisfy your needs and those of your customers. Contracts may include services that your company provides—such as subscription services, internet access, or support provided to customers during a specified period of time. Other contracts may contain service agreements to maintain and repair a product during the manufacturer warranty period or after it has expired. Acumatica supports both scenarios with flexible and automated billing options.

KEY FEATURES OF RECURRING REVENUE MANAGEMENT

- **Automate billing.** Automate recurring billing, payments, and collections to significantly improve business performance. Use templates to set up revenue billing rules for different products and services with automated revenue generation, recognition, and allocation.
- **Manage complex products and pricing models.** Take advantage of flexible pricing models that make it easy to accommodate software licenses, subscriptions, maintenance agreements, bundled items, SaaS, and complex discount arrangements.
- **Change billing contracts.** Modify, rewrite, and cancel billing contracts and revenue recognition schedules already in progress.

“Recurring revenue is the baseline of our business. It’s the valuation of our business. It’s very important to our industry...We searched for a provider that was built for the cloud and selected Acumatica True Cloud ERP. [We now] have instant access to information, helping to speed business and lets us focus on what we do best, which is to design, implement, execute security solution that provide peace of mind.”

—Jamie Vos, Owner and General Manager, Security Solutions

For more information contact Protelo at www.proteloinc.com | 916-943-4428

> CUSTOMER STORIES

Renewals

Drive contract renewal revenue by automatically scheduling and managing renewal activities. Proactively plan renewal activities with automated views of completed renewals, renewals due, and past due renewals.

Billing Templates

Set up revenue billing rules for different products and services, including automated billing, revenue recognition, and allocation.

Automatic Revenue Recognition

Generate and consolidate revenue and revenue recognition schedules automatically. Book revenue in the correct accounting period and according to the proper rules set by your accounting procedures. The system also enables easy revenue recognition based on percentage complete by project or contract.

Built-in Visibility

View and explore recurring billing data with self-service access to more than 25 standard reports. Customized reports are easy to configure.

Smart Credit Card Processing

Automate payment processing with a system that understands the complexities of credit card rules and gateway services. Use tokenized payment processing to reduce risk exposure and simplify PCI compliance validation.

Integration with the Full Acumatica Suite

Eliminate the need to enter data in multiple places. Easily convert prospects to customers or subscribers.

The screenshot displays the Acumatica software interface for managing contract renewals. The top navigation bar includes the Acumatica logo, a search bar, and user information (admin admin). The main content area is titled "Renew Contracts" and features a table of contract renewals. The table columns include Contract ID, Description, Contract Template, Contract Type, Customer ID, Customer Name, Status, Setup Date, Expiration Date, Last Billing Date, and Next Billing Date. The table lists 15 contracts, all of which are "Renewable" and "Active".

Contract	Description	Contract Template	Contract Type	Customer ID	Customer Name	Status	Setup Date	Expiration Date	Last Billing Date	Next Billing Date
0119SASS	Software contract, SaaS	SOFTSAAS	Renewable	ACTIVESTAF	Active Staffing Service	Active	1/1/2019	12/31/2022	1/1/2022	12/31/2022
10SOFTLIC	Software contract, licensed software, i...	SOFTLIC	Renewable	WESTERNTRC	Western Star Trucks	Active	1/5/2014	2/14/2023	2/15/2022	2/14/2023
19SOFTLIC	Software contract, licensed software, i...	SOFTLIC	Renewable	SAFECREDIT	Safe Credit Union	Active	10/5/2014	12/14/2022	12/15/2021	12/14/2022
20SOFTLIC	Software contract, licensed software, i...	SOFTLIC	Renewable	SHOREMORT	Shore Mortgage Inc	Active	11/1/2014	10/31/2022	11/1/2021	10/31/2022
21SOFTLIC	Software contract, licensed software, i...	SOFTLIC	Renewable	SILVERWATE	Silver Springs Water	Active	12/1/2014	11/30/2022	12/1/2021	11/30/2022
22SOFTLIC	Software contract, licensed software, i...	SOFTLIC	Renewable	ALPHABETLD	Alphabelland School Center	Active	1/2/2015	1/1/2023	1/2/2022	1/1/2023
27SOFTLIC	Software contract, licensed software, i...	SOFTLIC	Renewable	TOYSTAR	Star America Toys	Active	10/1/2015	9/30/2022	10/1/2021	9/30/2022
28SOFTSAAS	SaaS contract for Glog Consulting	SOFTSAAS	Renewable	NSSGLOGCON	Glog Consulting	Active	12/4/2015	12/3/2022	12/4/2021	12/3/2022
30SOFTSAAS	SaaS contract for Borders	SOFTSAAS	Renewable	BORDERSHOP	Borders Books, Music & Cafe	Active	2/20/2016	2/19/2023	2/20/2022	2/19/2023
36SOFTSAAS	SaaS contract for Uniforce Staffing	SOFTSAAS	Renewable	UNIFORCE	Uniforce Staffing Service	Active	10/25/2016	10/24/2022	10/25/2021	10/24/2022
39SOFTSAAS	SaaS contract for Boulder Couriers D...	SOFTSAAS	Renewable	BOULDERCR	Boulder Couriers Denver	Active	1/15/2017	1/14/2023	1/15/2022	1/14/2023
40SOFTSAAS	SaaS contract for Vancouver Supplies	SOFTSAAS	Renewable	VANCOUVER	Vancouver Supplies	Active	2/20/2017	2/19/2023	2/20/2022	2/19/2023

Streamline and automate customer contracts, contract billing, and renewal processes with Acumatica's flexible contract management and recurring revenue applications.

ABOUT ACUMATICA

Acumatica Cloud ERP provides the best business management solution for digitally resilient companies. Built for mobile and telework scenarios and easily integrated with the collaboration tools of your choice, Acumatica delivers flexibility, efficiency, and continuity of operations to growing small and midmarket organizations.

Business Resilience. Delivered.

Contact us today to get started: www.proteloinc.com | 916-943-4428