



PHOENIXSYSTEMS
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SYSPRO



ELITE
Solutions
Partner

Contract Billing

SYSPRO® Version 7 and 8

Advantage Plus



Features

- Contract billing creates a sales order
- All financial transactions are pure SYSPRO®
- Contract billing contract master file
- Billing dates vs. Contract dates
- Multi-media for scanned documents
- Custom form fields
- Report Writer and ODBC access
- Option to copy only a range of product classes
- One sales order for everything
- Recurring bills don't show installation & setup charges
- Provides a contract database
- Billing alternatives of monthly, quarterly, or every 2,4,6 & 12 months

Features Contd.

- Dates for contract coverage and billing
- Space for notations on miscellaneous charges
- Contract expiration date shows on invoice
- Option for copy existing sales order
- Month end process
- Reports, ODBC and SRS Report Writer dictionary
- Option for day of the month billing

Uses

Contract Billing can be used for:

- Hardware or software service contracts
- Billing for services such as insurance, rent, field service, internet services and leasing
- "Book of the Month Club" billing
- Collection of pledged donations

Advantage Plus

Setup Options Contract Master Files

Contract Billing Options

Close | Save | Update Current Period | Check for Updates

Contract Billing Selection Options

| | |
|---|--|
| Current Processing Year | 2015 |
| Current Processing Period | 03 |
| Default Billing Frequency | 1 |
| Retain Expired Contracts | 24 |
| Create S/O in suspense for failed credit | <input type="checkbox"/> |
| Miscellaneous Charge Options | |
| Product Class | BA |
| Taxable Orders | <input checked="" type="radio"/> Non Taxable <input type="radio"/> Taxable <input type="radio"/> Taxable (use 'other') |
| Tax Code | |
| Cost Amount | 0.00 |
| Default Warehouse | |
| Product Class Range for copy sales order | |
| From Product Class | |
| To Product Class | |
| Post by Branch | <input type="checkbox"/> |
| Use Operator Branch as default | <input type="checkbox"/> |
| Contract Numbering | |
| Automatic Contract Numbering | <input checked="" type="checkbox"/> |
| Next Contract Number | 3 |

Sample Contract

Contract Maintenance








Save | Customer: 0000000000000001 | Contract: 0000002

Contract Maintenance

| | |
|-----------------------------------|---|
| Customer | 0000001 |
| Name | Bayside Bikes |
| Contract | 0000002 |
| Description | Copy original Sales Order |
| Order Type | P |
| Customer PO | 35655 |
| Order Branch | 10 |
| Frequency of Billing (Months) | 1 |
| Contract Dates | |
| Contract Start Date | 12/16/2019 |
| Contract End Date | 12/15/2020 |
| Billing Dates | |
| Billing Start Date | 01/16/2020 |
| Billing End Date | 12/15/2020 |
| Next Billing Period | |
| Year | 2015 |
| Month | 03 |
| Billing Day | 16 |
| S/O Status | Ready to Invoice |
| Billing Created for Current Month | <input checked="" type="checkbox"/> |
| Contract Expired | <input type="checkbox"/> |
| Billing Information | |
| Billing Method | <input type="radio"/> Miscellaneous Charge <input type="radio"/> Copy existing Sales Order <input checked="" type="radio"/> Copy original Sales Order |
| Sales Order to copy from | 000921 |
| Copy non-default fields from S/O | <input type="checkbox"/> |
| Contract Amount to Bill | 0.00 |
| Annualized Amount | 0.00 |
| Contract Cost Amount | 0.00 |
| Product Class | |
| Taxable Order | <input type="checkbox"/> |
| Tax Code | |
| Comments | Comments |
| Copy Orders from Statuses | |
| Cancelled | <input type="checkbox"/> |
| Complete | <input checked="" type="checkbox"/> |
| Ready to Invoice | <input checked="" type="checkbox"/> |
| In Warehouse | <input checked="" type="checkbox"/> |
| Backorders | <input checked="" type="checkbox"/> |
| Open Orders | <input checked="" type="checkbox"/> |

Date Last Change: December 17 2019 | Last Operator: Norman Giroux

Contract Billing Adds to SYSPRO® Menu System Automatically

| | |
|---|--------|
|   Contract Billing Programs | |
|  Service Contract Maintenance | SCBBCB |
|  Service Contract S/O Create | SCB020 |
|  Contract Billing Month-End | SCB030 |
|  Service Contract Listing | SCB040 |
|  Service Contract Options | SCBOPT |

Screen Samples

Contract Billing Sales Order Creation

Close | Run

Contract Billing S/O Creation

Billing Period to Post

| | |
|-------|------|
| Year | 2013 |
| Month | 06 |

Days to Post

| | |
|--------------|----|
| Starting Day | 01 |
| Ending Day | 13 |

Order Status to Post

| | |
|--------------------------|--------------------------|
| Override Contract Status | <input type="checkbox"/> |
| S/O Status | Ready to Invoice |

Order Creation Options

| | |
|--|-------------------------------------|
| Create S/O in suspense for failed credit | <input checked="" type="checkbox"/> |
| Show Diagnostics | <input type="checkbox"/> |

Starting Order Number: | Ending Order Number: | Processing Contracts...

Contract Billing Month End Processing

Close | Run

Contract Billing Month-End

| | |
|----------------|------|
| Current Year | 2013 |
| Current Period | 05 |

Runtime Options

| | |
|---------------------|---|
| Period End Function | <input type="radio"/> Month-end |
| | <input checked="" type="radio"/> Un-Posted List |

Customer Number: | Contract Number: | Processing Contracts...

Billing Cycle

- Creates sales orders from contracts
- Flags the contract as processed and increases the next billing cycle
- Print invoices for selected sales orders
- Uses SYSPSRO standard invoice print feature
- Can be for a single order type = Contracts
- Contract billing month end report resets the flags to show 'Not Processed'

Option to Add Contract Billing to Smart Link

Customized Hyperlink

Caption to match:

Description for hyperlink:

Type of program to launch:

Program to launch: Browse-style program

Program parameters:

Tip: You can use reserved words such as %key, %coid, %oper as parameters.
%key will contain the value of the current key field.

SYSPRO - Demo for Phoenix Systems

Home Setup Import Query Administration

Program List Notepad Reminder Executive View Navigation Pane
Calendar Browser Favorites System-wide View
Inbox Tasks Flow Graph Role View
Financial Distribution Manufacturing Report Queue Personalize
Queries Personalization

Program List Favorites Find Clear

Program description Program

Accounts Receivable
Customer
AR Find C
Transaction
GL Integra
Tax
Reports
Browse

Customers for Branch: All

File Edit Navigate Options Include Sequence View
Start at Cust... Play Contacts...

| Customer | Name | Branch | Currency | Balance | First line of address | Tel |
|----------|--------------------------|--------|----------|---------|-----------------------|-----|
| 0000001 | Bayside Bikes | 10 | \$ | | P O Box 8 | 20 |
| 0000002 | Bikes and Blades - North | 10 | \$ | | P O Box 57895 | 41 |
| 0000003 | Bikes and Blades - South | 20 | \$ | | P O Box 756895 | 01 |
| 0000004 | | 30 | \$ | | P O Box 8576 | 61 |
| 0000005 | | 10 | \$ | | | |
| 0000006 | | 30 | \$ | | P O Box 14879 | 61 |
| 0000007 | | 20 | \$ | | P O Box 7367 | 02 |
| 0000008 | | 10 | \$ | | P O Box 3847 | 60 |
| 0000009 | | 10 | EUR | | P O Box 98-978 | |
| 0000010 | | 10 | \$ | | P O Box 78-8876 | 84 |
| 0000011 | | 20 | \$ | | P O Box 666 | 33 |
| 0000012 | | 30 | \$ | | P O Box 567 | 20 |
| 0000013 | | 20 | \$ | | P O Box 27356 | 01 |
| 0000014 | | 20 | \$ | | P O Box 80750 | 03 |
| 0000015 | | 10 | GBP | | P O Box 8757 | (16 |
| 0000016 | The OUTDOORS Company | 30 | \$ | | P O Box 65 | 51 |
| 0000017 | BMW | 10 | \$ | | P O Box 675 | 21 |
| 0000018 | Samcor (Pty) Ltd | 30 | \$ | | P O Box 768 | 16 |
| 0000019 | The Garden Executive | 20 | \$ | | P O Box 4370 | 61 |
| 0000020 | Bayview Wellington Homes | 10 | \$ | | P O Box 1000 | 55 |

Contract Billing

Switch Smart Link Off
Customize Smart Links...

Summary Of Contract Billing

- Seamlessly integrated with SYSPRO
- Has the look and feel of SYSPRO
- Continuously upgraded to the latest version of SYSPRO
- Written in the same language as SYSPRO
- Extends SYSPRO's capabilities
- C-ISAM or SQL (SQL only for V8)
- Phoenix Systems has over 35 years of SYSPRO development experience

Call Now

- Take steps in reducing your handling of redundant invoices
- Contact your SYSPRO reseller for a free quote on the Contract Billing module
- Visit **www.pho-sys.com** for more information on Advantage Plus products

