



# Financial Operations - B2B SaaS Best Practices

Presenter: Will Ibsen

March 28, 2019

# Billing & Collections

# Billing & Collections

Save to PDF CSV

## Invoice #US 10001119

Date: 3/28/18

Payment Terms: Net 30



### Bill To

Forecast  
1011 W 5TH ST  
AUSTIN, TX 78703-5311  
United States  
invoicedemo@saasoptics.com

### From

Astonish Solutions, Inc.  
5185 Peachtree Parkway, Suite 200  
Peachtree Corners, GA 30092

### Description


Astonish Enterprise	\$ 1029.37
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<b>Subtotal</b>	\$ 1029.37
<b>Sales Tax</b>	\$ 72.05
<b>Amount Due (USD)</b>	<b>\$ 1,101.42</b>

Unless advice to the contrary is received from you, the amount due will be debited from the payment details you have provided to us on or after the due date

- Questions
- Multiple email exchanges
- Late payments
- Tedious collections

# Billing & Collections



**Invoice #US100011119** [Download PDF](#) [Download W-9](#)

<p><b>From</b> Astonish Solutions, Inc. 5185 Peachtree Parkway, Suite 200 Peachtree Corners, GA 30092</p> <p><b>Bill To</b> Forecast 1011 W 5TH ST AUSTIN, TX 78703-5311 United States invoicedemo@saasoptics.com</p>	<p><b>Invoice Summary</b></p> <p><b>Invoice Number</b> US100011119 <b>Customer Number</b> 2018-2182 <b>Date</b> 03/22/2019 <b>Terms</b> Net 30 <b>Due Date</b> 04/21/2019 <b>Amount Due (USD)</b> \$ 1,404.47</p> <p><b>Ship To</b> 1011 W 5TH ST AUSTIN, TX 78703-5311 US</p>
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Item / Description	Quantity	Rate	Amount
<p><b>Astonish Enterprise</b> This is your subscription fee for Astonish Enterprise for the term starting 03/22/2019 and ending 05/21/2020. This invoice billing period is from 03/22/2019 through 06/21/2019.</p>	10	102.937	1,029.37
<p><b>Astonish Nano</b> This is your subscription fee for Astonish Nano for the term starting 03/22/2019 and ending 05/21/2020. This invoice billing period is from 03/22/2019 through 06/21/2019.</p>	10	26.807	268.07
		<b>Subtotal</b>	1,297.44
		<b>Sales Tax</b>	107.03
		<b>Amount Due (USD)</b>	<b>\$ 1,404.47</b>

**To remit by check:**  
Astonish Solutions Inc.  
PO Box 775236  
Chicago, IL 60677-5236


**To remit by Wire/ACH:**  
Astonish Solutions Inc.  
PNC Bank  
Account #: 8026214258  
Routing Number: 031207615

Pay with Bank Account
Pay with Card

**2 Attachments**



PDF Astonish Contract...



PDF invoice\_US100010...

**Astonish Solutions, Inc.**  
Invoice #US100011119

Remember me

Pay \$1,404.47

- Frictionless experience
- Easy payment processing
- Minimize collections manpower
- Invoice reflects contract terms

# Cross-Departmental Communication

# Cross-Departmental Communication



Sales



Customer Success



CRM

- Order processing
- Renewals
- Billing/Payments
- At risk account data

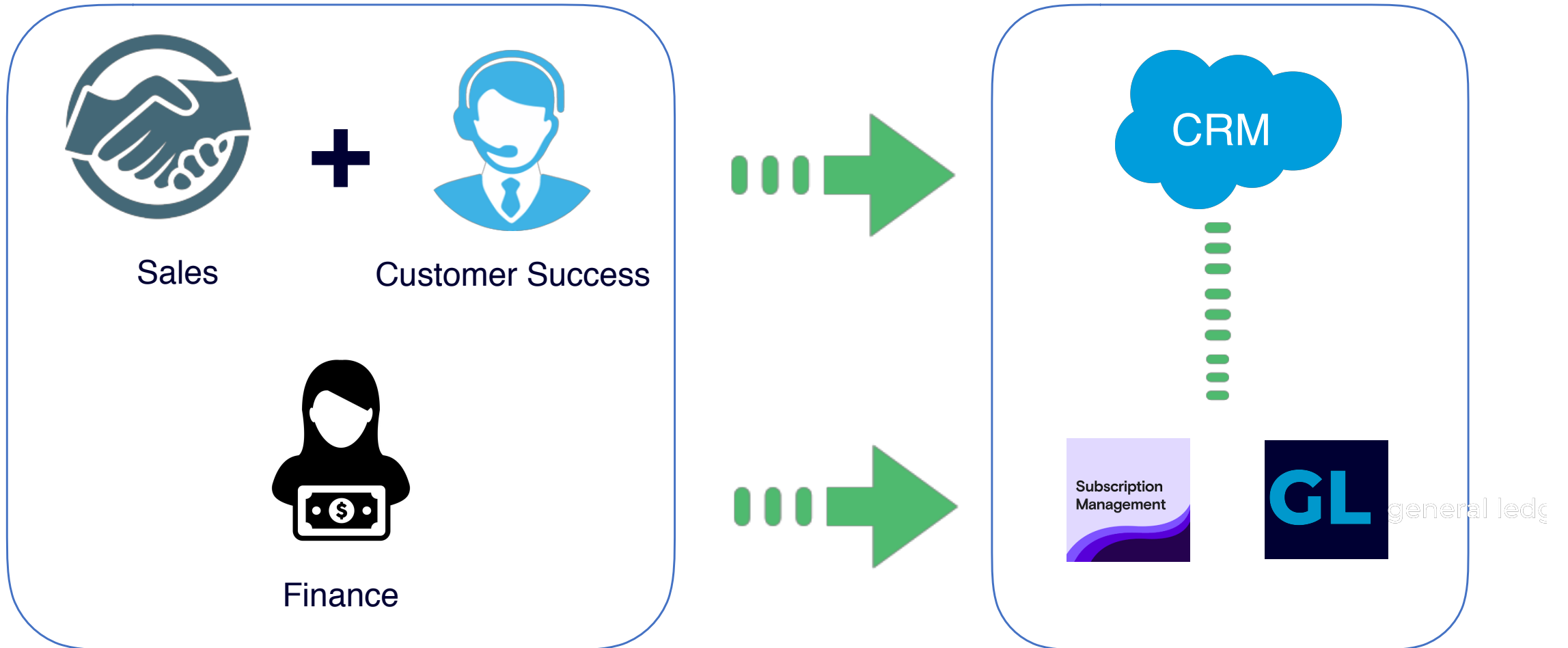


Finance

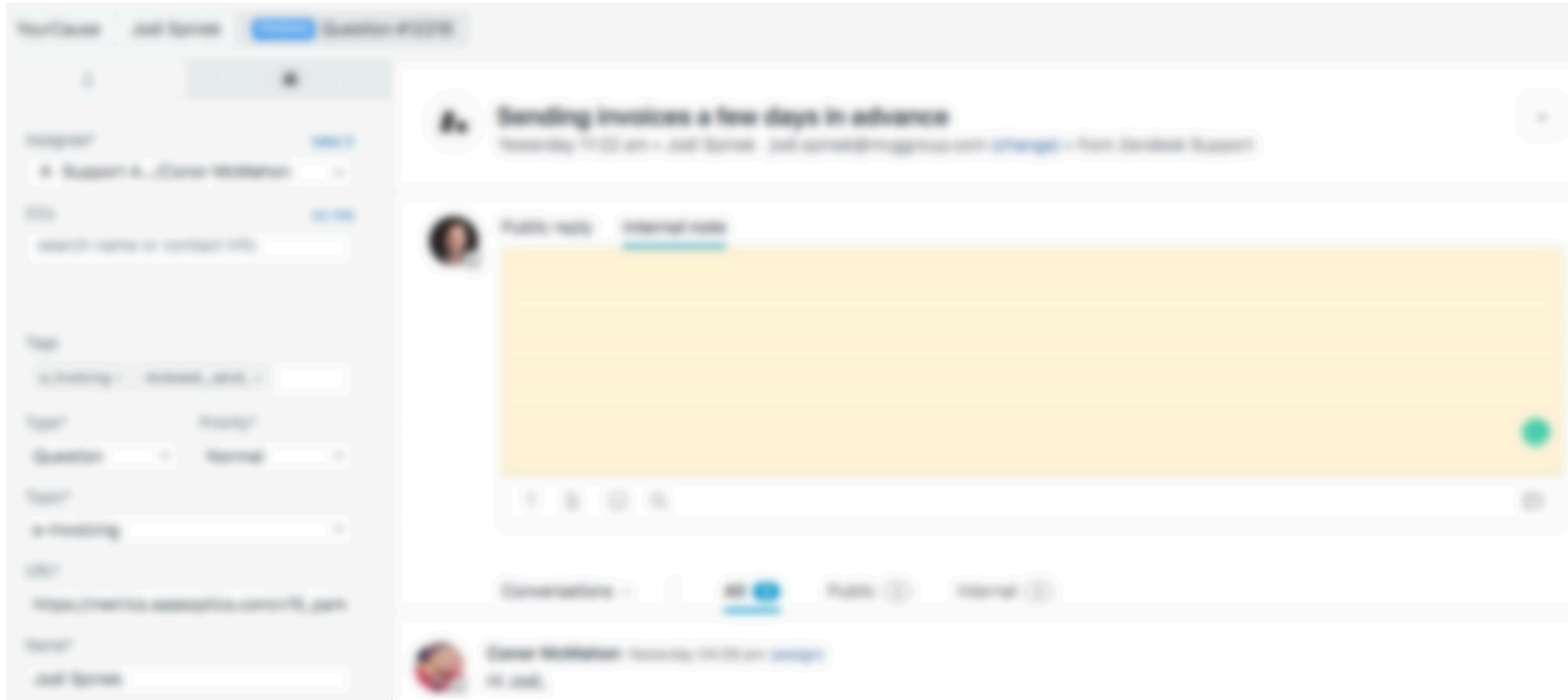


**GL** general ledger

# Cross-Departmental Communication



# Cross-Departmental Communication



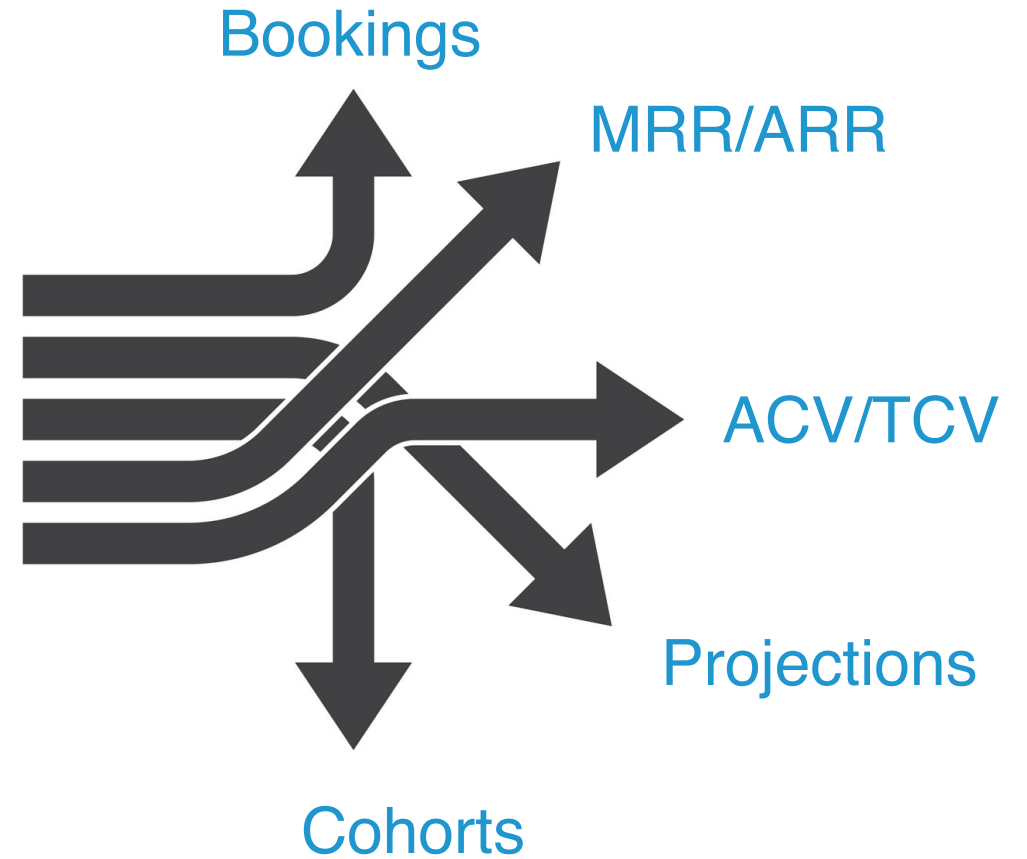
A screenshot of a Salesforce account page, highlighted with a blue border. The page shows the following information:

- Salesforce** (with a blue logo icon)
- [Configure Settings](#)
- ACCOUNT** (with a dropdown arrow)
- ACME Corp** (with a link icon)
- 2017-05-01  
Customer Since
- 14750  
Active ARR
- 27,500  
Total Past Due Balance
- 1  
Number of Invoices Past Due



# Source of Truth for KPI's

# Source of Truth for KPI's



# Performance Metrics & Analytics

