



Case Study:

The Billing Platform for **ENERGY SERVICES**

www.billingplatform.com

The Billing Platform for **ENERGY SERVICES**

1. The Company

A leading energy service provider in Asia Pac with a variety of commercial and residential products – including heating cooling, electricity & gas, hot water systems, and solar panel installations.

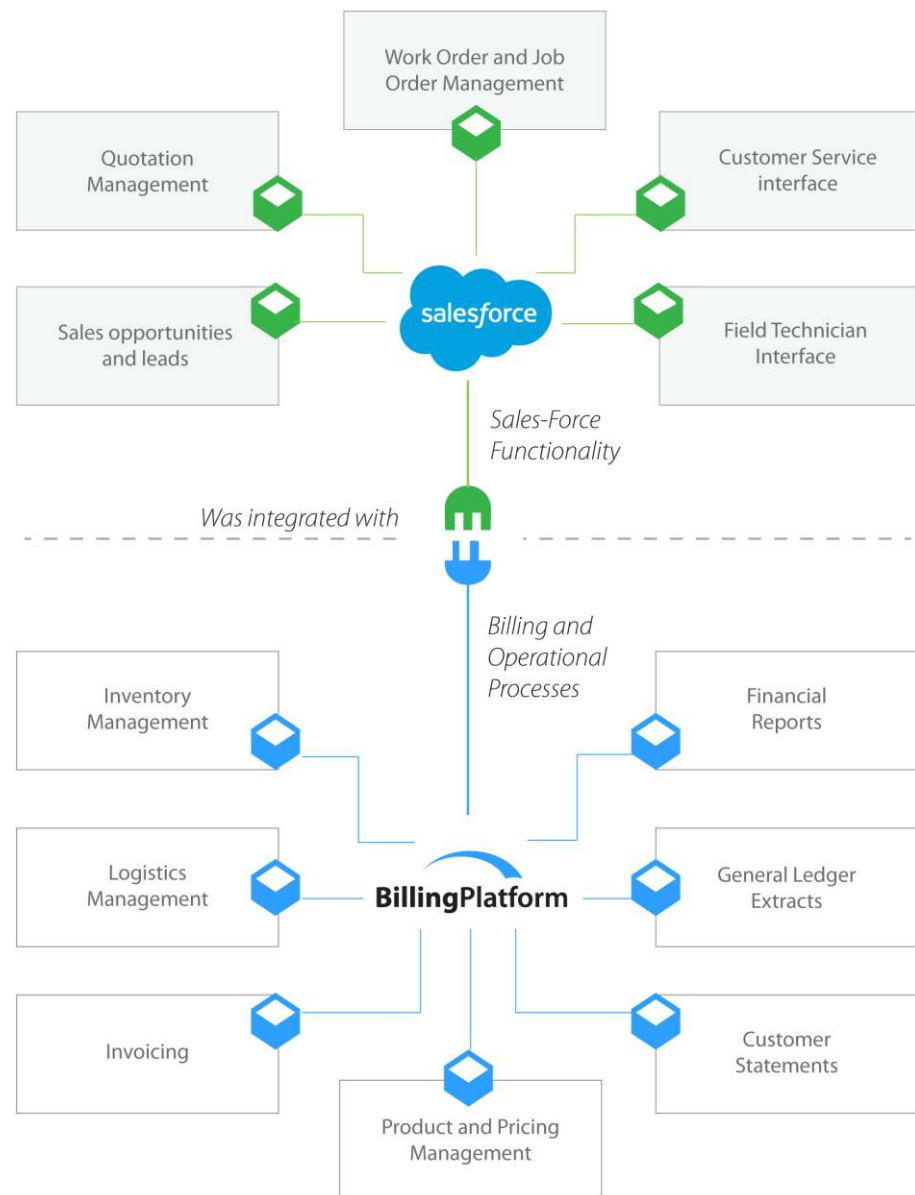
2. Overview

This large energy provider needed a dynamic application to support billing transactions related to Orders, Sales, Installations, and Maintenance of their products and services. Within two months BillingPlatform delivered a solution that fit their requirements perfectly. Their new billing engine provides dynamic product management tools, sales-force integration, customer invoicing, financials, and inventory and logistics management in real-time.

3.

Sales-Force Integration Overview

With the BillingPlatform system, the company was able to integrate SalesForce functionality with critical billing and operational processes.



4.

Product Management

BillingPlatform allows them to define an unlimited product catalog within the system that is maintained by Product Managers for sale. Product managers can utilize both the UI for one-off changes or the platform's bulk loader for mass updates or uploads. The product catalog is synced with Salesforce on a nightly basis so that sales agents and field technicians can quickly utilize product information within the Salesforce app – speeding sales cycles, installations, and maintenance.

5.

Customer Invoicing and Financials

The platform provides the company with comprehensive invoicing and financials. Customer account information is sent to BillingPlatform to generate and send invoices and statements in real-time to customer emails after a particular event, such as a sale of a product or service.

This makes it easy for customer service and sales representatives to trigger invoices and obtain payments from customers. All invoices and statements are sent directly to Salesforce so that customer services reps can access them when needed.

Detailed financial reports can be generated based on any entity and time interval within the system at any time and translated for loading into SAP – giving the Finance team insight into the status of their business.

Inventory and Logistics

The Platform gives them an efficient order management system that allows suppliers and warehouse owners to create purchase orders, track and receive supplies, and track materials for customer installations – fulfilling client expectations and providing valuable operational information.

The platform allows for automatic or manual creation of purchase orders that can be based on warehouse/hub-configured replenishment thresholds or triggered by work orders that cannot be fulfilled with current warehouse stocks.

Stocks are added or subtracted based on various **stock events**, including:



RCTI (Recipient Created Tax Invoice) functionality is available for suppliers and allows for the creation of invoices on behalf of suppliers for services rendered by these suppliers.

Conclusion

A leading energy provider now has a dynamic billing platform that provides comprehensive billing and rating functionality and centralizes inventory management, purchase orders, and invoice & statement generation and delivery in an efficient, automated set of processes. The Platform's unique customization capabilities provide them with the exact business scenarios they need quickly and efficiently, making their new billing and support system highly adaptable to change.

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