



# Recurring Invoicing

DESIGNED FOR MICROSOFT DYNAMICS™ NAV



## BENEFITS

- Takes the hassle out of remembering to invoice your customers.
- Automatically generates invoices to customers on a regular basis.
- Keeps track of expired or soon to expire agreements.
- Don't dispatch service personnel to customers with expired or non-paid agreement.
- Saves time.

## TAKE THE HASSLE OUT OF YOUR RECURRING INVOICING

Skip the hassle of having to remember to invoice your customers on a regular basis. Easily keep track of expired or expiring agreements. SimCrest Recurring Invoicing made for Microsoft Dynamics NAV will save you time by handling it all for you.

## THE WAY IT WORKS

This add-on allows you to set up agreements that should be invoiced on a regular basis. It will automatically create new invoices when agreements are nearing its renewal date thus saving you from having to remember to invoice your customers.

The add-on is based on an Agreement Card where you setup the Customer, the Agreement Type, an amount, and a start date. You can set up any frequency desired assigning the sales to an Item, Resource, or G/L account.

| Posting Date | Type    | Description | Amount | Expiration | Invoice No. | Invoice Date |
|--------------|---------|-------------|--------|------------|-------------|--------------|
| 10/7/2010    | HOTLINE | Hotline     | 100.00 | 12/1/2010  | 1011        | 10/7/2010    |

Agreement Card

| Code | Description | Date Formula |
|------|-------------|--------------|
| 10D  | Ten Days    | 10D          |
| A    | Annual      | 1Y           |
| M    | Monthly     | 1M           |
| Q    | Quarterly   | 1Q           |
| W    | Weekly      | 1W           |

Agreement Frequency Codes

When you create and post an invoice to the customer's account, the system will wait until the invoice is paid to calculate the new Renewal Date. This allows you to ensure that any services associated with an Agreement will not be performed until payment has actually been applied to the last agreement invoice. Once the payment is received, the system will update the Renewal Date on the Agreement Card automatically making it ready for the

next recurrence. An Agreement Ledger is populated and updated each time a new invoice has been created or a payment has been applied. This allows you to see all the invoicing history associated with the Agreement Card.

The add-on also allows you to closely monitor agreements that have expired or are nearing their expiration date.

## CONTACT US FOR MORE INFORMATION

Take the hassle out of your recurring invoicing by purchasing this add-on today! Contact us for more info or to schedule a live demo.



# Other Add-ons from SimCrest®

DESIGNED FOR MICROSOFT DYNAMICS™ NAV



## PRODUCT CONFIGURATOR

### Benefits:

- Assists your sales Department in selecting the right configuration for your clients.
- A Production Configurator to help you manufacture a specific production BOM and routing, or Kitting.
- Support an indefinite number of levels in the questionnaire.
- Available with Web Enhancement Integration.

## QUICK PAYROLL

### Benefits:

- Fully functional US and CA payroll integrating to Dynamics™ NAV G/L and Bank Ledger.
- All federal and state reports included.
- Keep track of upcoming events like when to file and pay taxes.
- File and pay payroll taxes electronically with subscription.

## AUTO EMAIL

### Benefits:

- Never again will you have to print and mail documents.
- Print documents in HTML or PDF Format.
- Save on costly pre-printed documents, postage, and envelopes.
- Include logo's and other graphics in the printed documents.



## CREDIT CARD MANAGEMENT

### Benefits:

- Process Credit Cards directly in Dynamics™ NAV.
- Everything is handled in Dynamics™ NAV; no external terminal is necessary.
- Payments can be automatically posted.
- The system handles separate authorization and capturing of funds.
- Will handle credit cards on all sales documents and also stand alone (no document).

## ELECTRONIC BANK RECONCILIATION

### Benefits:

- Fully-integrated to the existing Dynamics™ NAV Bank Reconciliation system.
- Has zero footprint in standard Dynamics™ NAV making it very easy to install and implement.
- Reconcile your account within just a few minutes!

## ROUTE PLANNING

### Benefits:

- Operate Route Planner directly in the existing Microsoft Dynamics™ NAV.
- Create the most efficient delivery routes with just a few clicks.
- Plan routes for sales visits.
- Deliver more while saving time, miles, and fuel expenses.
- Deliver orders before a specific time.
- Increased delivery efficiency; Improved customer satisfaction.