

**Subscription
Billing****CASE STUDY**

Sunshine 811 saves \$15,000 annually by streamlining recurring billing with Subscription Billing Suite

Company overview

Sunshine 811 is a not-for-profit corporation designed to provide essential information on safe digging and prevent damage to Florida's underground facilities. Their mission is to promote and facilitate excavation safety and underground utility damage prevention to make Florida the safest place to dig. Operating a call center and advanced ticketing system for over 1,000 members, they assist private and governmental entities in protecting their underground utilities.

The problem

With so many members, Sunshine 811 struggled to gain complete visibility of their billing process—they often sent out invoices several weeks into a new month due to the amount of manual work involved. In addition, their system tended to bottleneck under pressure. Billing occurred through the member assessment process, and budgetary demands would determine the amount invoiced.

Data collected was used for the final billing and invoicing, which led to numerous problems as moving information between various systems introduced errors. These were hard to fix, and the IT team often had to pitch in when there were issues. Bugged down with obsolete processes and struggling to import accurate data into their accounting system, they decided it was time to migrate to Microsoft Dynamics 365 Business Central (Business Central) and look for a better, fully integrated billing solution.

“Our billing just wasn’t transparent. A lot could go wrong. And when it did, it took a lot of effort to fix it”

Julie Adamson, Accounting Manager and Controller at Sunshine 811

The challenges

■ **Difficulty gaining full visibility of billing processes**

It was often hard to track the billing process with multiple systems handling information from start to completion. They did not have complete data visibility with so many imports, and it was impossible to control accuracy within their existing setup.

■ **Data could be unreliable and tricky to fix**

Struggling to validate data was a time-consuming process that required a lot of effort and cross-checking multiple sources. Mistakes were hard to catch and even harder to fix. Because of this, invoices sometimes contained errors, and reports were challenging to audit.

■ **Monthly invoicing took several weeks to complete**

Due to the number of manual processes, it was common for invoices to be sent out several weeks into a new month.

■ **Administrative tasks slowed down the assessment process**

Timelines were regularly stretched when conducting member assessments due to labour-intensive administrative work and the speed at which they could load assessment information into the system.

■ **Required support from IT to handle systems**

Many of the bottlenecks or issues that arose between their various systems required IT support. The accounts team had little control, and headaches were often due to technical problems.

■ **Lacked functionality to deal with recognizing revenue on prepaid accounts**

The team was struggling to manage revenue from prepaid expenses. They did not have the tools to implement a deferral schedule to automate revenue recognition.

■ **Needed a billing solution that would fully integrate with Microsoft Dynamics 365 Business Central**

After migrating from Great Plains to Business Central, they were conscious that any solution would need to integrate fully with their new software to help streamline workflows and ensure billing accuracy.

“Subscription Billing Suite is a great fit because it not only helps with our billing process but also with the management of prepaid expenses with its revenue recognition mechanism.”

Julie Adamson, Accounting Manager and Controller at Sunshine 811

The solution

After much research of the market and partnering with a consultant, Sunshine 811 chose Subscription Billing Suite (SBS). Based on what they were seeing in the market, it was clear that many Business Central solutions did not have the flexibility they needed for their billing processes. In the end, SBS hit the nail on the head when it came to solving their challenges.

“It makes things efficient for us because it’s one upload that we have to do. We can set it and forget it for almost a year. The system manages itself. It’s flawlessly integrated.”

Julie Adamson, Accounting Manager and Controller at Sunshine 811

The benefits



Flexibility to automate billing for members on different payment plans

They can now automate a billing schedule for members on both a monthly and annual basis without creating extra work. The result is invoices go out faster, and members are happier.



Transparency makes it easier to perform audit checks and follow the data flow

Before SBS, the team struggled to navigate audits and rarely had the time to perform the kinds of checks required to ensure the accuracy of the data they were importing. Now, they can quickly validate data and follow audit trails without any hassle. There’s much more visibility, and they can see how data flows through to the various contracts and customers.



Operates without intensive IT support and integrates fully with Business Central

Previously, IT support was the go-to whenever anything went wrong across their various systems. Now, with recurring billing working from within Business Central, it’s simple for anyone to step in at any stage in the billing process and troubleshoot if something goes wrong.



Increase in accuracy between billing data and member ticketing system

It’s much easier to verify totals and cross-check them against the ticket management systems reports. Before, it was typical for discrepancies between billing and ticketing, which the increase in accuracy has reduced.



Reduction in manual processes and speedier assessment processes

It's now possible to quickly import spreadsheets during the assessment process, reducing the time it takes to upload and manage this information across systems. It's seamless, easy, and transparent, giving them effortless access to assessment information without the manual workload.



Automate deferred revenue and revenue recognition

One of the core benefits of SBS is setting a deferral schedule to enable accurate revenue recognition and expense deferrals. This gives their organization more accurate financial reports and allows them to make better business decisions.



Frees up time for more strategic, in-depth work on the organization's other objectives

The system has freed up time so the team can look at strategic objectives in-depth. Most recently, they've been able to focus their attention on investment policies, benefits, and conducting a compensation and benefits study.

“Our project manager was very knowledgeable. I’m not much of an IT person, but she translated how the system components work so that an accounting person can use them to manage their organization’s finances better. When there was a question or an issue, she was right on it. She was also good at keeping us on track during the implementation. She didn’t lose sight of anything.”

Julie Adamson, Accounting Manager and Controller at Sunshine 811

The results

2+

weeks saved each month.

6+

months saved per year.

100%

integration with Business Central.

\$ 12,000-\$ 15,000

annual savings.

1,000+

members accurately billed.

“Overall, we have greater oversight and control over the monthly changes made to our various customers. We’re now able to catch mistakes before the mistakes happen and end up on an invoice, which is a win-win for both our organization and the customer”

Julie Adamson, Accounting Manager and Controller at Sunshine 811

Learn how Subscription Billing can help your organization scale



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