

**CASE STUDY**

# Emburse Leverages NetSuite's SuiteBilling for Subscription-Based Billing

SquareWorks Consulting assisted Emburse with the design and implementation of SuiteBilling to create a scalable and efficient billing solution to support its portfolio of expense management and AP Automation products.



Emburse provides a portfolio of modern spend management platforms that focus on expense management and AP Automation solutions. The finance team, based in Portland, Maine, manages the billing for its entire portfolio of products. Each of its products use subscription-based billing that combines a contract-based and usage-based process requiring overage tracking in a robust ERP.

Emburse went live with NetSuite in October of 2016, and quickly realized that its billing process was highly manual. The finance team was using memorized transactions to book invoices for all contract-based amounts, and then entering overage charges based on usage in separate invoices to then consolidate into a unified invoice. In addition to being time consuming and prone to errors, this was also creating inaccuracies in its formatting and taxation. More importantly, this process prevented any insight into future revenue and inhibited the finance department from processing invoices quickly and efficiently. Emburse understood that in order to support its projected growth, it would need to optimize how it tracked and billed its customers.

Emburse turned to SquareWorks Consulting to help determine a solution, after its successful track record working with Emburse on several other NetSuite Optimization engagements and ongoing NetSuite Support.

After a diligent assessment of how to best optimize the billing process, and exploring different products and alternatives, Emburse made the decision to move forward with implementing NetSuite's flagship billing solution for subscription-based billing and hired SquareWorks Consulting to assist with the implementation.



*"The process that we had set up for billing initially was not a scalable solution. SquareWorks was familiar with SuiteBilling and our business case, it helped us determine this was the ultimate solution to our unique needs."*

**Danielle Camarata**, Corporate Controller, Emburse

## How SquareWorks Consulting Helped

SquareWorks Consulting worked directly with Emburse to design and configure SuiteBilling for Emburse's specific use cases. Working closely with the company to tailor the implementation, SquareWorks Consulting was able to ensure that the process was going to meet Emburse's specific needs regarding project design and timeline to implement the solution.

### Project At-A-Glance

- ▶ Assessment of Business Needs and Billing Structure
- ▶ Solution Planning and Preliminary Design
- ▶ Integration Development and Testing
- ▶ Delivery of Tailor-Made Billing Calculations
- ▶ Implementation and Go-Live

### Solution Design

In order to deploy this product, SquareWorks assessed Emburse's billing structure for each of its solutions and evaluated how to best design the SuiteBilling solution in its NetSuite environment. Emburse has multiple item types including recurring subscriptions, one-time costs for items like implementation and setup, and usage-based billing for overages. Each of these components are billed and priced differently including monthly, quarterly, annually and semi-annually. SuiteBilling helped automate the usage calculation, billing, revenue recognition, and renewal.

In addition, Emburse was able to take advantage of Interval Pricing with SuiteBilling. This feature allows for different pricing during the subscription term, where the first couple of months can be free and then the customer is invoiced for the recurring amount. All of the pricing is handled with multiple currencies (USD, CAD, GBP, AUD, EUR) as well. By using SuiteBilling, Emburse was able to move away from memorized transactions and consolidated invoicing, ultimately saving time and further customization.

*"I truly enjoy the automation of it; with SquareWorks' help, we were able to configure each of our subscription options across the portfolio and we don't need to think about it again unless we need to change something. Now, making changes to someone's subscription when they need to be made is much easier than it once was."*

**Sonya Dvilinsky**, Accounting Manager, Emburse



Once the billing solution was developed and deployed to the sandbox, Emburse's finance team was given a breadth of testing scenarios to ensure the accuracy of this module. The testing process was detailed and specific to its use case, instilling confidence in Emburse's NetSuite users. The solution testing was built to break down the billing structure for each of Emburse's solutions and allow the team to practice how it would be translated into NetSuite with the guidance of SquareWorks Consulting.

*"In terms of our implementation, we would have been lost without SquareWorks, especially with a newly-acquired organization, we did not understand the way that its billing was set up in a way that was meaningful. SquareWorks was able to translate this data to get us up and running on SuiteBilling in a way that helped us and made us more efficient."*

**Danielle Camarata**, Corporate Controller, Emburse

## **Go-Live and Results**

Once all the billing structures had been designed and tested in NetSuite, Emburse cleaned and migrated its data into the new module and deployed the new process. It instantly eliminated manual steps for its price tracking and streamlined the billing process as a whole.

*"SquareWorks helped us change the billing architecture completely; we went from multiple invoices, manual imports of data, and memorized transactions just to keep track of that recurring billing for the subscriptions, to a solution that was architected to manage subscriptions and easily pull in usage data."*

**Danielle Camarata**, Corporate Controller, Emburse

For more information about SquareWorks Consulting's NetSuite Optimization Projects, please visit: <https://squareworks.com/netsuite-optimizations/>