

# Oracle PeopleSoft Billing

Oracle's PeopleSoft Billing is a billing management application that streamlines the billing process and allows organizations to create individualized billing to optimize collections. PeopleSoft Billing delivers the functionality and flexibility to manage billing activities that meet business needs. Organizations can leverage the online architecture to structure their system into a state-of-the-art solution for the most complex billing requirements.

## Gain Performance with Flexible System Design

PeopleSoft Billing simplifies the billing process by dramatically reducing repetitive data entry. You can manage all billing activities from the Billing WorkCenter, which allows you to manage your daily work, review exceptions, view reports, and take actions from one central page.

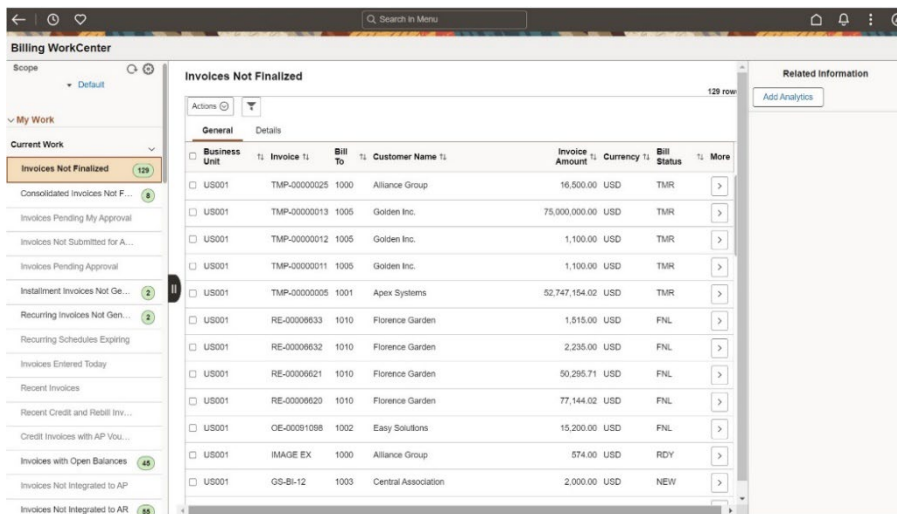


Figure 1. Billing WorkCenter allows users to manage all billing activities from a centralized work area.

PeopleSoft's approach to manage bill cycles and streamline processes enables you to:

- Define an unlimited number of business units.
- Relate one or multiple billing business units to a single general ledger business unit.
- Roll up business units for summary reporting at multiple levels.
- Streamline information storage by sharing control tables across business units.

## Key Features

- Configure invoices to meet your customers' needs.
- Manage all billing activities from the Billing WorkCenter
- Quickly create bills and invoices with Express Bill Entry
- Easily customize existing invoice examples
- Create bills in different languages and currencies
- Create and manage credits and re-bills
- Streamline accounting and revenue recognition
- Define billing cycles and schedules specific to individual customers
- Simplify bill presentment
- Integrate with other PeopleSoft applications
- Support federal accounting requirements
- Integrate with third party credit card Suppliers for credit card authorizations
- Integrate with third party tax providers

## Key Benefits

- Streamline bill creation
- Optimize collections
- Achieve a comprehensive bill management system

- Support other PeopleSoft products and third-party systems.
- Leverage enhanced search capabilities to narrow searches by selecting multiple fields with range capabilities.

## Streamline Bill Creation Process

PeopleSoft Billing takes advantage of automated and online bill entry, enabling you to enter information directly, or import information from an external system, or other PeopleSoft applications. Bill entry allows you to create, adjustment, approve, and process bills online. You can:

- Review, approve, and correct billing activity online.
- Use the Approval Workflow Framework to approve credits and re-bills.
- Use Express Bill Entry to add new bill lines and clone existing ones in bulk.
- Streamline manual bill entry with extensive business unit, bill type, and customer level defaults.
- Record unlimited bill lines with definable line types.
- Establish one or more accounting entries per bill line.
- Segregate billing activity by business unit, bill type, bill source, or billing cycle.
- Process adjustments and review the historical audit trail of adjustment invoices online.
- Define operator-assigned, or system-generated invoice numbering with multipart capability.
- Store standard and nonstandard notes for bill headers and bill lines.
- Email an invoice image, or PDF as an attachment to customers.

## Benefit from Comprehensive Billing Management

PeopleSoft Billing enables you to create invoices that reflect your business requirements. You can streamline recurring billing for activities like rental invoices or standing purchase orders. You can use installment billing to invoice customers in segments, with the total amount due divided equally, by percentage, or according to your configured definition. PeopleSoft Billing fully supports federal accounting requirements with entry event codes and reimbursement agreements.

## Related Products

The following PeopleSoft products integrate with Oracle PeopleSoft Billing:

- Order Management
- Inventory
- Payables
- eBill Payment
- General Ledger
- Receivables
- Project Costing
- Contracts
- Grants

## Related Services

The following services support Oracle PeopleSoft Billing:

- Oracle Consulting Services
- Advanced Customer Services

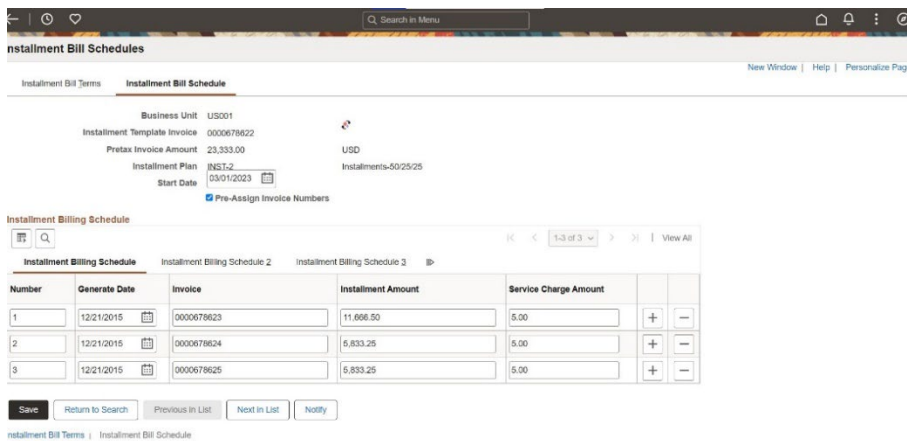


Figure 2. Using installment billing, you can create flexible payments, which support complex billing options to meet your business needs.

Our comprehensive bill management enables you to:

- Generate recurring invoices.
- Support multiple methods to defer revenue.
- Process inter-unit and intra-unit accounting and billing.
- Use installment billing to structure flexible payment plans.
- Recognize accrued revenue for non-invoiced activities.
- Create consolidated billing invoices.
- Generate full or partial credit, and re-invoice bills.
- Use PeopleSoft Commitment Control to check budgets and correct accounting entries.
- Apply multilevel percentage, or specific amount discounts and surcharges.
- Support zero and credit balance invoices.
- Use PeopleSoft tax tables, or leading third-party tax Suppliers to apply sales tax at the bill line level.
- Specify whether taxes be calculated by the seller for free items on customer invoices.
- Support online credit card authorization and credit card payment settlement.
- Support card verification value (CVV) for credit card processing.
- Integrate with a third party processor to process credit card information.
- Use the Bill Status Change feature to simplify the approval of multiple invoices.
- Create and post accounting entries to reflect invoicing activities.
- Support federal accounting requirements with entry event codes and reimbursement agreements on federal invoices.

- Manage bill-to, ship-to, sold-to, and service-to customer information,.
- Invoice bills across multiple billing business units in a single run, or invoice a single consolidated bill across multiple billing or general ledger business units.
- Use extensive bill-inquiry and operator-controlled online bill search and query capabilities.
- Delay billing until paid by specifying hold days on customer bill-to options and hold them until the date on the billing header.

### **Support Extensive Invoice Formatting**

Create invoice formats to deliver bills that meet specific customer needs. Keeping up with customer invoicing requirements, you enable them to pay you more quickly.

- Modify invoice examples to meet customer-specific invoicing requirements. Delivered examples include invoices for Oracle's PeopleSoft Enterprise Services Automation (ESA) and Oracle's PeopleSoft Order Management.
- Support multiple invoice formats, including standard federal bill formats and consolidated bill formats.
- Select the sequence of bill lines using predefined sorting criteria.
- Define billing cycles and schedules specific to individual customers.
- Generate pro forma and on-demand bills.
- Support EDI transmission of your invoices.
- Support courtesy paper copies of your invoices to multiple addresses.

### **Provide Fully Integrated Enterprise Solution**

PeopleSoft Billing integrates with other PeopleSoft and third-party applications to create a single, end-to-end system for managing the billing process.

- Leverage integrations with PeopleSoft Order Management, Project Costing, Contracts, and Grants Management to bill product, services, and expense charges.
- Bill intercompany inventory transfers across multiple countries from PeopleSoft Inventory.
- Receive direct return materials authorization (RMA) credits from PeopleSoft Order Management and PeopleSoft Inventory.
- Pass the credit card information captured in RMAs to Billing to credit the proper credit cards.
- Generate accounting entries at summary and detail levels for PeopleSoft General Ledger.

- Share the same accounting environment defined in PeopleSoft General Ledger.
- Distribute pending items to PeopleSoft Receivables.
- Generate vouchers for PeopleSoft Payables.
- Leverage integration with PeopleSoft eBill Payment, PeopleSoft's electronic bill presentment and payment product, for customer self-service.
- Drill down from PeopleSoft Billing to other PeopleSoft applications to access additional detail.
- Use standardized application program interfaces (API) to create a centralized consolidation of information from external third-party and homegrown billing source systems.
- Extract information from PeopleSoft Contracts for government contract progress payment and withholding information
- Leverage a common processing tool to meet OFAC requirements to identify customers on the Specially Designated Nationals (SDN) lists.
- Integrate with tax providers for tax calculation.

## Configure Reporting

Flexible reporting enables you to access billing information any way you choose.

- Use extensive accounting, control and reconciliation reports provided with PeopleSoft Billing.
- Reprint accounts receivables, general ledger, and accounts payable reports when you want to regenerate lost reports created from previous processes.
- Review key operational metrics

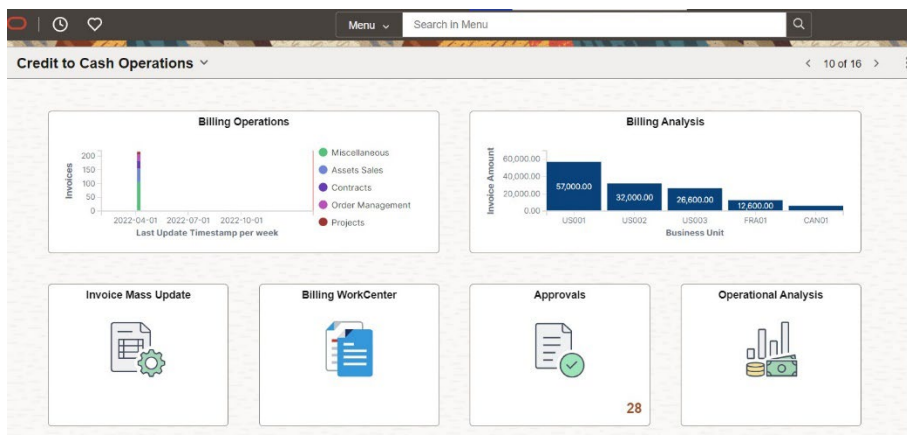


Figure 3. Track your Billing Operations with Analytic Dashboards

## Meet your Unique Global Requirements

A full range of accounting and reporting features for multinational organizations enables you to:

- Bill customers in a different currency than your base currency.
- Print invoices using your customer's preferred language and currency.
- Print billing reports in the language of your user.
- Calculate and create VAT invoices and reports.
- Assign sequence numbers to documents to meet European reporting and control requirements.
- Use VAT tax at Declaration at Accounting Date functionality to meet the Office of Foreign Assets Control (OFAC) compliance.
- Leverage VAT in India functionality.

## Oracle's PeopleSoft Financial Management Solutions

Oracle's PeopleSoft Billing is part of an integrated family of financial accounting and analytic applications. These solutions provide flexible, best practice business processes and greater insight into performance – helping organizations worldwide to transform finance into a strategic advantage.

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