

# Run a health check on your billing process

A self-assessment to understand the strength of your billing, revenue recognition and CRM-to-ERP integration.

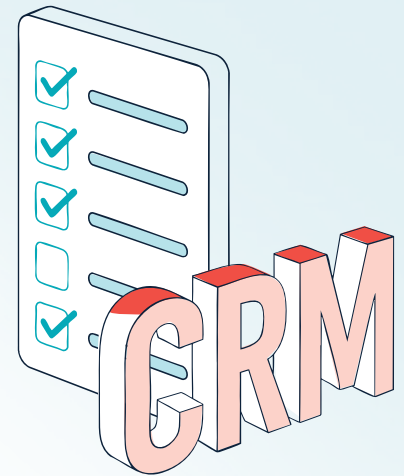
**When did you last review where billing actually lives in your tech stack – and if it still fits how your business runs today?**

Where billing happens may not seem like a high-stakes decision – until something breaks. In our work with finance teams, we've seen that most don't proactively rethink their billing setup. It usually takes a breaking point: a merger introducing new entities, a PE/VC investor demanding faster closes or a key employee walking out the door with all the process knowledge in their head.

In many businesses, billing wasn't designed with finance in mind. It evolved around sales tools like CRM/CPQ or other third-party systems – a quick fix, something finance had to work around, not something they controlled.

The outcome? Reporting delays. Revenue mismatches. Forecasts are off. Because data is late, disconnected or just plain wrong.

This billing health check assessment is designed to help you quickly spot gaps and inefficiencies in your billing, revenue recognition and CRM-to-ERP workflows. At the end, you'll see your score and what it means for your current setup. Is it optimized for growth? Or is it time to rethink the way you manage these critical processes?



“

“When billing is fragmented across systems and teams, the ripple effects touch every corner of the business. Forecasting breaks. Customer trust takes a hit. And finance ends up explaining problems it didn't create.”

– **James Hewitt,**

Finance leader and NetSuite ERP expert

## Who is Zone & Co?

We've helped thousands of finance teams move from fragmented billing tools to **ERP-native billing automation** built entirely inside NetSuite. Some needed faster closes. Others were buried in manual workarounds between CRM, CPQ, Excel and ERP. Many didn't realize how much risk and effort their **disconnected billing setup** was creating – until they made the switch.



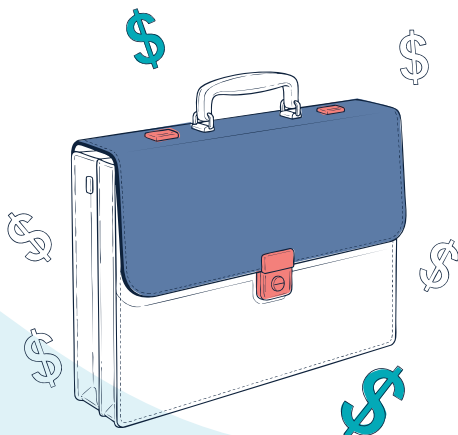
### Business impact assessment

#### Is billing quietly eroding the foundation of your business?

- ☐ You're managing billing, payments and contract changes across multiple tools outside the ERP.
- ☐ Your CFO or board can't get a real-time view of bookings vs. billings vs. revenue without waiting on your manual reconciliations first.
- ☐ You've charged customers incorrectly because your billing system pulled outdated or incorrect data from the CRM.
- ☐ Your board or PE/VC investors are frustrated with slow close cycles driven by disconnected invoices, payments and revenue streams that aren't automatically reconciled in your ERP.

**If you checked two or more:** Your current billing setup is likely eroding financial control and creating friction across operations, customer satisfaction and revenue recognition.

**Consider this:** Sales updates a contract in the CRM. RevOps adds a usage tier to match the pricing change. But the ERP never sees it – and the customer gets invoiced incorrectly. Finance catches the blame, but did they even have the right data to get it right?



#### Did you know?

##### What happens when billing moves inside NetSuite?

For Sourcegraph, moving billing inside NetSuite meant eliminating manual revenue tracking, spreadsheets and risky data transfers from Salesforce. Before the shift, their month-end close dragged on and the company was exposed to audit risks.

Now, with billing and revenue management fully embedded in NetSuite, **revenue recognition time is down 70%**. Finance can see revenue schedules in real time, make adjustments instantly and close the books with confidence.



"The integration with Salesforce and automated billing and revenue recognition that ZoneBilling gives us is still the most valuable to our finance team."

– **Samantha Ulrich-Herman**,  
Accounting Manager at Sourcegraph



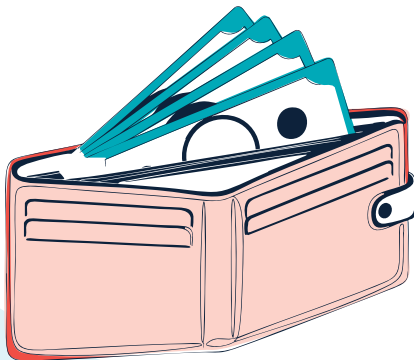
### Opportunity costs

#### Are you paying the price for a broken billing process?

- ☐ You're deferring new revenue streams – not because of market readiness, but because your billing system can't model them cleanly.
- ☐ You've absorbed revenue losses, paid penalties or even lost customers due to invoice errors or tax miscalculations.
- ☐ You've normalized workaround-driven billing – but the hidden costs surface in increased staffing, late fees and missed margin opportunities.
- ☐ You're planning to add finance headcount just to keep up with invoice volume or billing changes.

**If you checked two or more:** Your billing architecture is likely quietly draining margin – not just through manual work, but through data gaps, integration breakdowns and reconciliation delays. Billing sprawl almost always has a price – you just won't see it on a line item until it's too late.

**Consider this:** Your company is ready to launch a new usage-based pricing model. Marketing is prepped. Sales is ready. But finance has to hit pause because your billing is split between CRM and ERP, and neither can fully model it. How much revenue are you leaving on the table while waiting for your systems to catch up?



#### Did you know?

**Billing outside the ERP might be costing more than you think – even if no one's flagged it.**

Most CRM setups weren't built for finance. They weren't designed to:

- ◆ Enforce ASC 606 or IFRS 15
- ◆ Generate audit-ready records
- ◆ Sync contract changes with revenue recognition
- ◆ Support multi-entity or usage-based billing

So finance fills the gaps. Manually. Quietly. Expensively.



"Every inefficiency has a cost. Whether it's manual billing, duplicate data or bad reporting, it all adds up. When your billing process is streamlined and automated inside the ERP, those problems disappear."

– **James Hewitt**, Finance leader and NetSuite ERP expert



### Commercial structure and CRM capabilities

#### Can your ERP support your commercial activity in CRM?

- ☐ You can't generate invoices that reflect the agreed commercial terms and customer expectations accurately.
- ☐ Your CRM can't support multi-element arrangements, so finance has to manually split and track line items.
- ☐ Your billing system can't support multi-entity or multi-currency transactions without manual workarounds.

**If you checked two or more:** Your finance team may be absorbing complexity that was never meant to be theirs.

**Food for thought:** New customer segments often bring new expectations: new pricing models, new contract structures, multi-entity invoicing. If your team is rebuilding the billing process every time sales closes a complex deal, it's time to rethink your approach.



#### Did you know?

**When billing can't support the realities of the deal, workarounds quickly pile up:**

Splitting bundled contracts manually – because billing system can't handle multi-element terms.

- ◆ **Rebuilding pricing logic** – when third-party tools can't support hybrid models or usage tiers.
- ◆ **Reissuing invoices** – when sales modifies payment terms in a CRM that the invoice template can't accommodate.
- ◆ **Chasing partial payments** – because the invoices don't match the agreed contract terms or purchase orders.
- ◆ **Managing escalations from sales or customer success** – when a payment doesn't align with the contract.

The more complex your deals and terms grow, the harder it gets to manage them with a fragmented billing process.



"We see it constantly – sales closes the deal, but finance has to reverse engineer the invoice. If your systems can't account for the agreement as it's sold, your people are left picking up the slack."

– **James Hewitt**, Finance leader and NetSuite ERP expert



## Run a health check on your billing process

### CRM to ERP data and invoicing capability

#### Does contract data flow seamlessly between your systems?

- ☐ CRM-driven discounts or pricing logic aren't honored in the ERP – so you have to fix invoices post-generation instead of preventing errors upstream.
- ☐ When complex deals are entered in the CRM – or when customers upgrade or downgrade mid-contract – you need to manually rebuild or adjust the billing logic inside the ERP.
- ☐ Invoice and customer records don't match across your ERP, CRM and billing systems – creating duplicates and missed transactions.

**If you checked two or more:** You may be spending too much time fixing issues that a better system integration between ERP and CRM can prevent.

**Consider this:** If invoicing complex transactions relies on workarounds known only by one or two people, what happens if they leave? When billing logic isn't built into your ERP, you're left with fragile processes that might crumble the moment someone steps away.



#### Did you know?

**Billing doesn't break when Salesforce and NetSuite are fully connected.**

Lattice's billing process used to depend on manual invoice uploads, data cleanup and reconciliation across Salesforce, NetSuite and Stripe. Multiple finance specialists spent hours fixing issues daily just to keep things moving.

After adopting ZoneBilling and ZonePayments – fully embedded in NetSuite – invoice processing now takes seconds, not hours, with a **90% increase in billing efficiency**.



"ZoneBilling streamlined our process, reduced manual work and gave us the scalability we needed to support growth. Our billing system no longer constrains us."

– **Lakshman Manoharan**, Head of Business Systems at Lattice



Book a demo

zoneandco.com

in  5

### Revenue recognition – compliance and automation

#### Can your system track earned revenue easily and accurately?

- ☐ Deferred revenue is unclear because your CRM or third-party billing app can't properly reflect credit-based or usage-based pricing.
- ☐ You're tracking ASC 606 or IFRS 15 compliance outside the system – or manually posting entries into the ledgers – because your CRM lacks built-in revenue recognition logic.
- ☐ You're still tracking deferred revenue in spreadsheets – because your billing system can't reflect what's actually been earned.

**If you checked two or more:** Your revenue recognition process is likely fragile and heavily manual. If ASC 606 or IFRS 15 compliance is being tracked outside your ERP, it's a sign your current systems aren't designed for financial precision at scale.

**Consider this:** It's quarter-end. Revenue needs to be finalized fast. But you're still updating spreadsheets by hand to figure out what's actually been earned. How long can you scale like this?



#### Did you know?

When billing is fully embedded inside the ERP, revenue data doesn't need to be pulled, reconciled or double-checked.

It flows seamlessly from billing to revenue recognition – automatically updating schedules, deferring revenue accurately and capturing upgrades or downgrades as they happen. This eliminates the month-end scramble to patch numbers, match reports and answer leadership questions about revenue alignment.



"ZoneBilling has been an easy-to-use billing and revenue recognition tool, saving us hours each month. Implementation was pretty smooth, and the confidence in data accuracy has been a big relief for us."

– **Samantha Ulrich-Herman**, Accounting Manager at Sourcegraph





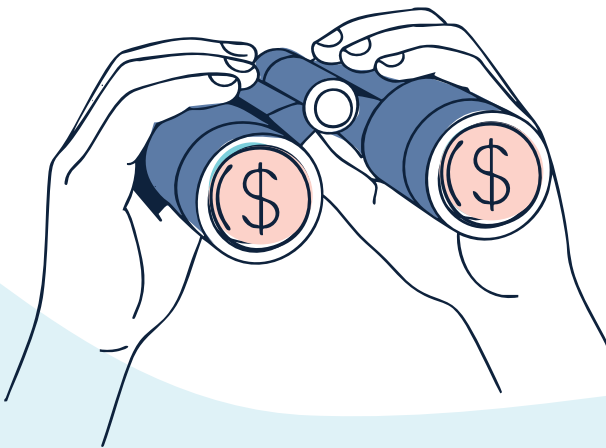
### Financial control and audit readiness

#### Do you have a single source of truth for billing data?

- ☐ You're exporting billing data to validate tax calculations – instead of managing it directly inside your ERP.
- ☐ You need to configure tax rules and FX rates manually – or adopt new tools – every time you expand into a new market.
- ☐ You scramble to respond to audit requests because no single system holds the full billing record – it's split between CRM, ERP and billing tools.

**If you checked two or more:** Your billing process is likely exposing you to compliance risks. If your ERP can't provide a full transaction history on demand, you're one audit away from serious delays, penalties or worse – missing data.

**Consider this:** Your new CFO asks for detailed billing records across entities. You need exports from your CRM, ERP, billing tool – and a few spreadsheets – just to piece it together. If your data is that fragmented, is your audit trail going to be there when you need it?



#### Did you know?

**This 3D software company's audit prep used to take weeks.**

Billing records were scattered across emails, spreadsheets and shared drives. Each audit meant scrambling to piece together contracts, transactions and revenue entries – and hoping nothing was missed.

Now, with billing fully embedded in NetSuite, every subscription, adjustment and revenue entry is tied to the customer record. The team reclaimed **six full workdays per quarter** – nearly a month of AR effort saved annually.



“Once a labor-intensive operation, managing our billing processes became a breeze with the subscription functionality [inside ZoneBilling]. As a result, we gained better control and understanding of our revenue sources.”

– **David White**, Business Services Manager at Tech Soft 3D



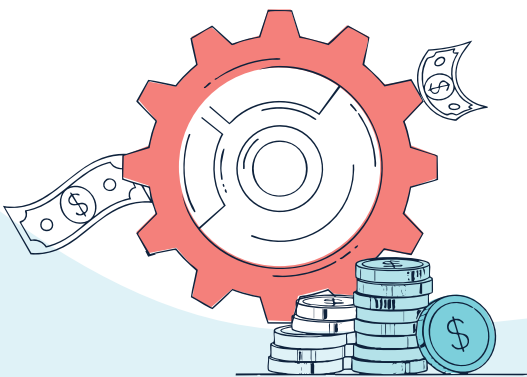
### Scalability & process automation

Can your billing setup handle 10x complexity without 10x effort?

- ☐ Your billing process relies on one person who knows how to “make it work” between systems – and if they leave, the knowledge goes with them.
- ☐ M&A, entity growth or new business models trigger manual rebuilds of billing logic instead of scaling seamlessly.
- ☐ You’re managing billing changes through manual approvals and email chains – leaving gaps in your audit trail.
- ☐ You’ve invested in finance tools and billing add-ons, yet end-to-end automation is still out of reach.

**If you checked two or more:** Your billing setup is likely stuck in reactive mode – adding headcount and manual steps just to keep up. If every product launch, pricing change or new market requires reworking your billing logic, scalability isn’t happening.

**Consider this:** If finance already relies on workarounds for usage-based or subscription billing, what happens when complexity doubles? Can your team still keep up if you acquire another company, add global entities or adopt tiered and hybrid pricing?



#### Did you know?

**What scalable billing looks like inside the ERP.**

An automation-focused telecommunications provider used to spend **five days per billing cycle** manually processing invoices due to complex pricing models and disconnected systems. After moving billing into NetSuite with ZoneBilling, **the same process now takes less than a day** – even with new products, pricing models and market expansions. No new billing tools for each region. No manual invoice adjustments.



“Without ZoneBilling, we would not have been able to support our customer growth without significant back office effort and a high chance of failure.”

– Blair Woodbury, CFO at Devoli





## Run a health check on your billing process

### Still billing outside your ERP?

Download our whitepaper to understand the financial risks, hidden costs and real-world tradeoffs of that decision – and what leading finance teams are doing instead.



### Your billing system health check: You checked \_\_\_\_\_ boxes

**0-3 items checked:** Your current billing setup may be adding avoidable complexity. Right now, you might be managing the friction, but as volume grows, pricing models evolve or compliance demands increase, those inefficiencies will become more than just a time drain – they'll start cutting into margins and scaling potential.

**4-10 items checked:** Your billing system is likely making core finance functions harder than they need to be. Reporting delays, revenue gaps or scaling challenges may already be showing up. Without intervention, these issues will only become harder to untangle.

**10+ items checked:** Your current billing approach is stretched beyond what it was designed for. Errors, missed revenue and resource strain may already be seeping into your financials as hidden costs. The longer you allow these gaps to persist, the deeper they embed into your operations, amplifying risk during audits and stalling growth when it matters most.



Book a demo

zoneandco.com

in  9

## Run a health check on your billing process

### If your billing isn't built for scale, finance pays the price.

What starts as a simple way to invoice customers – often patched together with sales tools and third-party apps – eventually becomes a web of disconnected platforms, duplicate records and finance workarounds.

We've seen it play out with thousands of finance teams: The more the business grows, the harder it becomes to maintain control over revenue, audit trails, reporting and compliance.

Leading finance teams don't wait for the pain to unravel – they're rethinking where billing belongs and rebuilding it where it should have been all along: inside NetSuite.

#### When billing lives inside an ERP like NetSuite:

- ◆ **Revenue and billing stay in sync** – no rekeying, no mismatched rev rec schedules
- ◆ **Close timelines shrink** – because finance isn't chasing data across tools
- ◆ **Audit requests become faster, not harder** – with every record tied to the source
- ◆ **Finance regains control** – no waiting on syncs, no patching bad integrations
- ◆ **Costs drop** – fewer third-party tools, fewer staffing band-aids

**if your finance stack isn't as seamless as it should be, let's talk.** We'll show you what's possible when billing lives where it should – inside your ERP.



#### Did you know?

With finance automation inside the walls of NetSuite, our customers typically see the ROI in 6-9 months through:

- ◆ **90% increase in billing efficiency** with real-time data sync between NetSuite and Salesforce
- ◆ **75% faster bill turnaround**
- ◆ **100% bank reconciliation accuracy** and faster month-end close
- ◆ **Three months of payroll admin cut** each year
- ◆ **Zero system sync delays**

Calculate how much you could save with AP or billing management automation, directly inside NetSuite. →



#### Finance without friction. NetSuite elevated.

Zone is the financial operations platform used by 4,000+ NetSuite customers. Our billing, AP automation, reporting and payroll solutions are embedded inside of NetSuite – so you have no integrations, no sync errors and no limits to your growth.