

**Q: Which Microsoft Dynamics™ products are Recurring Contract Billing (RCB) compatible with?**

A: RCB is designed to integrate with Microsoft Dynamics™ GP ONLY.

**Q: When do you plan to have RCB integrate with Microsoft Dynamics™ AX or Nav?**

A: At this time, there are no plans to develop the integration to other Microsoft Dynamics products.

**Q: Can I set up a contract that has multiple line items with different billing frequencies and different start and end dates?**

A: Yes. Every line on the contract can have a different billing frequency and different start and end dates.

**Q: How many line items can I put on a contract?**

A: Although the application does not restrict the number of line items per contract, system performance will be something to consider when setting contracts up. Our internal testing shows a noticeable negative impact to performance when contracts with over 400 lines are created.

**Q: How many contracts can be processed at one time?**

A: Preliminary test results indicate performance is best when processing batches of 1,000 contracts or less.

**Q: What types of billing frequency options are available?**

A: Billing frequency options include one-time, daily, weekly, bi-weekly, monthly, bi-monthly, quarterly, semi-annually, annually and user defined.

**Q: Does RCB integrate with the Microsoft Dynamics GP Multicurrency module?**

A: Yes.

**Q: If I manage my contracts in RCB and create invoices, where do the invoices reside and get stored?**

A: The Create Recurring Documents function in RCB sends the selected invoice details to Invoices in the Sales Order Processing (SOP) module. Posting is done from within SOP and invoice history is stored there. Invoice history is also available per contract in RCB.

**Q: Does RCB integrate with Microsoft Dynamics GP Invoicing module?**

A: Integration to both Invoicing and SOP were supported in earlier versions of RCB. With the release of V9.0 only SOP is recommended and supported by Encore.

**Q: What if I want RCB to create Quotes or Orders in SOP rather than Invoices?**

A: This enhancement is available in V 10 service pack release. Users now have the ability to send billing details to Quotes, Orders or Invoices in Microsoft Dynamics™ GP 10

**Q: If I create an order in SOP and later want to create a contract in RCB, is there a Copy or Create option to set the contract up?**

A: Not at this time. The user would have to create the contract in RCB manually.

**Q: Does RCB integrate with the Microsoft Dynamics GP SOP user defined fields?**

A: Yes. User defined information that you want to set up in RCB and move to SOP should be entered in the SOP user defined fields.

**Q: Are there user defined fields specifically for contract information?**

A: Yes. User defined information that you want to record on the contract but not integrate to SOP should be entered in the RCB user defined fields.

**Q: Can I create a contract while speaking with a customer and then print the details out for them to sign?**

A: Yes. The contract is a standard report that includes signature lines. The report can be edited to include your organizations terms and conditions.

# Recurring Contract Billing

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**Q: What kind of reporting is available?**

A: Reports can be run for a specific contract or group of contracts to indicate what contracts are due for billing, which contracts are expiring and which contracts have already been billed based on the dates you specify.

**Q: Can I print a pre-billing report before I generate / print invoices?**

A: Yes this is a standard report.

**Q: If I make a mistake and generate invoices, quotes or orders in error, is there a way to undo this process without having to void all the SOP documents?**

A: Yes. Providing the SOP documents have not been posted, there's an option to rollback the documents to RCB and return the contract details to the original state prior to creating the SOP documents.

**Q: Why is this feature important?**

A: It saves a tremendous amount of time as some customers generate batches of hundreds of documents at a time. This feature allows them to reverse the process without having to void each document individually and then update each contract individually.

**Q: After invoices, quotes or orders have been generated from selected contracts, can they be edited before posting?**

A: Yes. When the transactions are sitting in SOP, they can be edited however these edits do not change or update the details on the original contract in RCB.

**Q: Can invoices, quotes or orders be generated for select contracts?**

A: Yes. invoices, quotes or orders can be created by customer range, contract or customer class, sales territory, item number, or any of the user-defined fields in SOP.

**Q: Does RCB use the price levels established in Microsoft GP Inventory module?**

A: Yes. RCB uses price levels per line, as does SOP. You have the option to disable price levels by line item which allows you to enter price changes manually.

**Q: What if we decide not to bill a customer at a scheduled frequency?**

A: Billing cycles can be skipped by contract or by line item.

**Q: Does RCB integrate with SmartList?**

A: RCB does not have any SmartList objects available. If you have SmartList Builder, you can use it to access the RCB tables to create SmartList objects. Advanced SmartList can then be used to create further queries.

**Q: Does RCB work with Microsoft Dynamics GP Revenue Expense Deferral module?**

A: Yes.

**Q: How does RCB integrate with Microsoft Dynamics GP Revenue Expense Deferral module?**

A: Revenue Expense IDs are used to define the deferral rules. The appropriate Revenue Expense ID then needs to be attached to contracts in RCB.

**Q: What happens when a contract has multiple line items that need different deferral rules applied?**

A: Only one Revenue Expense ID can be attached to a contract header. If different deferral rules apply, separate contracts would need to be set up for each rule.

**Q: Does RCB integrate with EFT?**

A: Yes. RCB does integrate with Microsoft's Electronic Funds Transfer for Receivables Management module.

# Recurring Contract Billing

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**Q: Does RCB integrate with a credit card application?**

A: Yes. Azox and Nodus have both developed an integration to their credit card solutions. There is a Software Developers Kit (SDK) available for developers of any other credit card processing applications who are interested in developing an integration.

**Q: Can RCB automatically email invoices that are generated?**

A: RCB sends invoices directly into SOP at which point Dynamics GP functionality takes over. Optionally, there are multiple 3rd party applications available to accommodate this requirement (Binary Stream, MC2, Accountable Software & Software Index).

**Q: Does RCB have the ability to pro-rate calculations?**

A: No. Calculations would currently have to be done manually and then entered in the contract line for one time billing. A second line in the contract would then be created to set the full contract amount up for the required frequency. This feature has been identified for future releases.

**Q: What happens with credit card transactions when a phone/Internet connection is lost?**

A: Credit card processing is handled by integrated 3rd party applications. This question would be better answered by the developers and supporters of the selected applications.

**Q: Can you identify parent / child relationships for invoicing purposes in RCB?**

A: This functionality is not available in RCB.

**Q: Does RCB integrate with any other Encore product?**

A: Yes. RCB can be used in conjunction with Encore's Project Tracking module to create project distributions for each contract.

**Q: Is it possible to import contracts from an external source into RCB?**

A: Yes. The Recurring Contract Billing Importer tool is available for purchase.