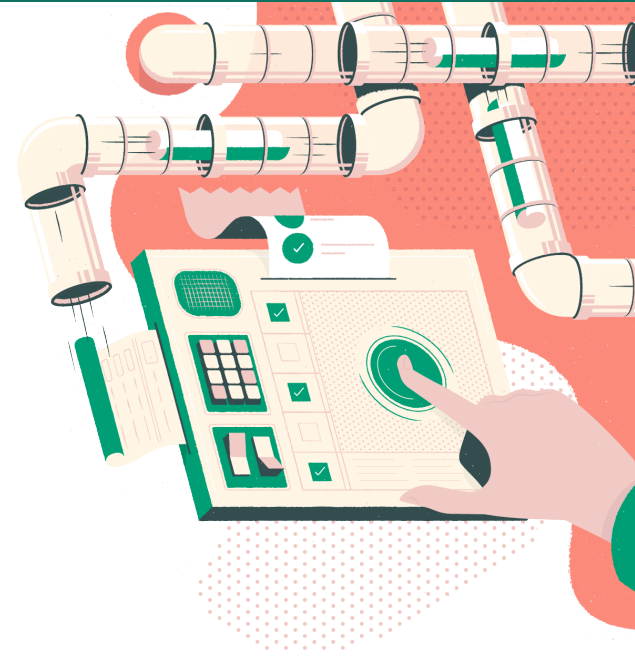**Invoiced**

SOLUTION DATASHEET

Invoiced A/R Cloud™

Put accounts receivable on autopilot with the award-winning Invoiced A/R Cloud™.

- **Get paid faster**
- **Stop wasting time on collections**
- **Provide a better payment experience for customers**

Invoiced's natively cloud based platform is the #1 rated A/R automation solution, combining everything businesses need for advanced billing, automated collections, payment acceptance, cash application, predictive collections analytics and more—all delivered through a streamlined, modern interface and a comprehensive A/R API.

Automate the entire A/R process from invoice to cash.

With a singular focus on advancing the accounts receivable function, Invoiced provides a comprehensive A/R Cloud for helping you manage the entire receivable lifecycle from invoice to cash. What's more, Invoiced takes substantial A/R efforts off your team's plate altogether, so that they can focus on higher impact work. With everything from an included customer payment portal to automated dunning to cash collection forecasting, Invoiced enables the ultimate glidepath for getting paid in the shortest amount of time and with the least amount of effort.

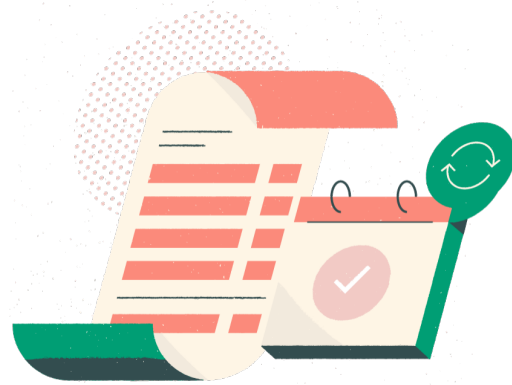### Improve A/R performance, team productivity and customer experience.

Ultimately, as with any cloud platform, the solution is only as good as the results it delivers. Invoiced customers consistently experience dramatically reduced DSO (days sales outstanding) and, naturally, a shorter path from receivable to received. In addition, finance and accounting teams who use Invoiced benefit by increasing RPR (receivables per rep) which means more A/R output per employee and the ability to scale A/R for high customer growth businesses at a fraction of the cost to staff the effort. Separately, Invoiced transforms the customer payment process, whether slightly out of date or woefully antiquated, into a modern, frictionless experience that customers expect.

**The Industry's Most Awarded
A/R Automation Platform**

HIGEST RATED
G2 Crowd
2020

EASIEST TO USE
G2 Crowd
2020

BEST RESULTS
G2 Crowd
2020

BEST SUPPORT
G2 Crowd
2020

FINALIST
The Cloud Awards
2019

WINNER
Comet Competition
2019

Easily set up and connect with your ERP, CRM and more.

As powerful as Invoiced is for your A/R process, it's a breeze to set up with minimal IT involvement required. Invoiced's 100% cloud-based solution makes it possible to sign up and start collecting within minutes. The Invoiced platform is built with integration in mind, so that you can easily connect nearly any ERP or accounting system and get going even faster with push-button integrations for NetSuite, Sage Intacct, QuickBooks Desktop, QuickBooks Online and Xero. Invoiced also easily integrates with Salesforce and dozens of other popular solutions like Slack, Avalara, Twilio, Stitch and more.

Configure to the specific needs of your business.

Since no two businesses run accounts receivable the same way, Invoiced is designed to fit your specific requirements at a granular level. That means highly detailed settings for what your internal users have access to, what your customers experience at every billing and payment touchpoint and what business rules are followed by the system automatically. With hundreds of individual configuration settings all accessible through the Invoiced dashboard, there are literally millions of possible ways to set up Invoiced according to your specific business needs. Configuration is point-and-click, well documented and well supported which means there's no need to start up yet another IT project.

Key Solution Features

Collections Automation

- Manage communication cadences and templates
- Automatically send communications/reminders to customers triggered by account age and past due age (i.e. intelligent chasing)
- Works across email, text and postal mail
- Collections cadence segmentation
- Payment/installment plans
- Automatic task assignment and tracking
- Create and manage communication templates
- Automated dunning and balance consolidation within payment reminders
- Send billing emails from your domain via SMTP
- Template merge variables

Customer Payment Portal

- Your own branded, customer payment portal at billing.yourwebsite.com
- Use Invoiced Payments Powered by Chase or one of 15+ other payment providers
- Pay via credit card, ACH, PayPal
- Customer "promise to pay", with tracking and flagging at the invoice level
- Full customer billing and payment history and subscription details
- Self-serve management of payment methods, AutoPay, payment plans and billing details
- Tokenization of "saved" payment information
- Customer access to receipts, account statements
- Integrated invoice comments and questions
- Payment portal at billing.yourwebsite.com
- Payment portal customization
- Passwordless authentication
- Optional Google Analytics tracking on payment portal

Billing CRM

- Powerful searching, filtering and across customers, invoices, subscriptions, payments, estimates and more
- Export any view of customers, invoices, payments or reports as CSV or PDF
- Merge customers
- Add additional contacts and payment methods to customer records
- Track email opens and online invoice views
- Track and filter all billing, payment and activity history per invoice and per customer

Subscription Management

- Customizable sign-up pages for plans
- Offer free trial periods
- Calendar billing for subscription plans including in advance and in arrears
- Add-ons for sign-up pages
- Pending line items for usage and metered billing
- Automatic proration based on plan changes
- Detailed subscription renewal and auto-renewal settings

Cash Application

- Individually match unapplied payments to one or more open invoices
- Short-pay and over-pay application
- Spreadsheet import of unapplied payments
- Virtual lockbox integration
- Automatic bank feed import
- Check lockbox BAI file import
- Automatic remittance advice detection and processing
- User-defined payment applications rules
- CashMatch AI™ payment application recommendations

Reporting & Forecasting

- Complete dashboard for collections KPIs
- Cash collection forecast
- A/R Aging
- Billing Communications
- Tax Summary
- Reconciliation
- Invoice Summary
- Late Fees
- Payment Summary
- Credit Summary
- Sales by Item
- Filter by time, custom fields and other properties
- Export to CSV or PDF

Advanced Configuration Features

- Late fees and early payment discounts
- Tax rate management
- Pricing catalog
- Multi-currency support
- Multi-entity support
- Custom fields for customers, invoices, subscriptions, transactions and more

Supported ERPs

Sage Intacct
NetSuite
Oracle
SAP
Microsoft Dynamics
QuickBooks Desktop/Online
Xero
Other/On-Premise ERPs

API Client Libraries

.NET
Go
Java
PHP
Python
Ruby

Compliance Standards

PCI Level 1
SOC 2
Privacy Shield
HIPAA
GDPR

Specialty Integrations

Avalara
Collbox
Earth Class Mail
Lob
Piesync
Salesforce
Slack
Stitch
Twilio
Zapier
SAML 2.0 SSO

Optional Services

Invoice Customization
Statement Customization
Custom Integrations
A/R Process Consultation

Support & Success

Detailed Documentation
Usage Guides
Onboarding & Training*
Customer Success Manager**
Email
Live Chat
Phone*
SLA**

* Requires Invoiced Advanced or Enterprise Plan
** Requires Invoiced Enterprise Plan