

# CLARITY SALES FINANCIAL MANAGEMENT VISUAL PROCESS MAP

## Customer Accounts

### Rental and services

Contract / licence agreements;  
Stepped rates and discount groups  
Recurring services: broadband,  
utilities, printing, parking, furniture  
and specialist support

### Service charge importing

from 3rd party systems such as  
Call Charges, Photocopying and other  
Point of Sale systems based on usage

### Event & meeting room booking

Space and equipment, catering  
services and more (hourly, daily and  
attendee rates and agreed discounts  
will be automatically applied)

### Prospect bookings

Space and equipment, catering  
services and more (hourly, daily and  
attendee rates and agreed discounts  
will be automatically applied)

### Customer Portal

A historical view of all invoices and credit  
notes raised on the customer's account

CLARITY | PORTAL

### Automated Billing

All charges are logged to the  
customers account for billing.  
Period end billing routines using  
invoicing wizards, automatically  
extracting the stored information  
for invoice generation. Generating  
invoices in batches and  
automatically emailing to  
customers using stored email  
contact addresses.

**Instant invoice generation  
for Ad-Hoc services**  
All charges are logged to the  
customers account for instant  
billing.

### Business reporting & analytics

including reports:

- Rental Income by office & meeting room hire;
- Invoices/Credits raised, Billed & un-billed services, Recurring services, Income and revenue analysis, Sales transactions;
- Debtors reporting

### Debtors management

Enabled credit control by viewing  
outstanding transactions on the  
customer's account along with the  
date of the last payment received;  
Generation of account statements

### Direct debit management (optional)

- Processing payment requests
- Submission recording and receipt allocation (reporting capabilities)

### Links to financial accounting systems

Sales transactional export  
to 3rd party accounting packages such as  
Sage, Xero, Agresso, Dimensions &  
Quickbooks etc.

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