

Scaling smarter: How DentalXChange built flexible, audit-ready billing for future growth

dental Xchange

DentalXChange, a leading cloud platform for the dental industry, connects practice management systems, DSOs, independent providers, insurance payers and technology partners across a unified ecosystem. Following its transition from founder-led management to private equity backing, the company faced growing demands for robust financial reporting, contract flexibility and scalability within its ERP.

After migrating to NetSuite, DentalXChange sought a billing solution capable of managing complex, interdependent pricing arrangements while supporting the company's expanding product lines and customer base. The answer came with **ZoneBilling**, a native NetSuite solution that streamlined contract management, automated pricing scenarios, and set the foundation for audit-ready revenue operations.

With ZoneBilling in place, DentalXChange's finance team now spends significantly less time on manual billing setup, processes invoices faster, and maintains full confidence in pricing accuracy and compliance, all while positioning the business for long-term growth.

DentalXChange addresses the full lifecycle of dental RCM. From verifying eligibility to filing accurate claims and beyond, their powerful platform, intelligent data, and massive network ensure payers get exactly what they need so dentists get exactly what they've earned.

www.dentalxchange.com

Industry: Technology / Healthcare

Headquarters: Irvine, CA

Company size: 150+ employees

Customer since: 2024

Products: ZoneBilling

Integrated software: NetSuite, Boomi, Azure

Implementation partner: Accordion Partners

Involved teams: Finance & Accounting,
Data & Business Intelligence

Private equity sponsors: Successfully exited the Bregal Sagemount portfolio and acquired by new PE sponsor, KKR

Key Outcomes:

- ◆ Flexible contract and pricing management across all customer types
- ◆ 10+ hours saved through billing automation
- ◆ Increased billing accuracy and audit readiness
- ◆ 5+ complex pricing models supported
- ◆ Scalable billing infrastructure for continued growth



“We wanted a nimble tool that could handle all of the various types of contracts we have for our customers. ZoneBilling gave us that flexibility.”

– John Fowler,
AVP Corporate Controller, DentalXChange

The Challenge: Complex contracts and limited billing flexibility

As DentalXChange scaled under private equity ownership, its existing systems struggled to keep pace with the company's diverse pricing models and reporting requirements.

◆ Disconnected tools and inflexible billing logic

Moving from Great Plains to NetSuite, DentalXChange needed a billing engine that could handle a wide range of contract types: from interdependent tiered pricing to multi-SKU bundles. Their initial solution failed to accommodate complex scenarios, creating inefficiencies and forcing the finance team into manual workarounds.

◆ Manual effort and compliance risk

Without automation or **native NetSuite integration**, each pricing change required manual configuration and validation. This limited visibility, increased the potential for errors and made it harder to scale with confidence as the company grew.

◆ The need for a native, scalable solution

DentalXChange needed a solution that was both powerful and flexible, one that could adapt to evolving contract structures, reduce manual processes and align financial reporting with PE expectations for accuracy and scalability.

The Solution: Native automation and intuitive contract management inside NetSuite

DentalXChange partnered with Accordion Partners and Zone to deploy ZoneBilling directly within their NetSuite environment. Together, they designed a scalable **order-to-cash** workflow that could seamlessly handle contract creation, pricing updates and recurring billing without the limitations of their previous system.

The implementation was executed through collaborative, iterative testing. Teams from DentalXChange, Accordion, and Zone held daily and weekly touchpoints to validate contract logic across a variety of customer arrangements.





"After struggling for over a year with SuiteBilling's interface, moving to Zone was a breath of fresh air. It's extremely user-friendly and just works."

- John Fowler,
AVP Corporate Controller, DentalXChange

Once activated, ZoneBilling's automation replaced manual spreadsheets and disconnected billing workflows with a unified, intuitive interface.

Key features that made the difference:



Interdependent tiered pricing: Ability to aggregate quantities across multiple SKUs before applying pricing logic.



Flexible contract management: Simple setup for amendments, renewals, and annual price increases at the SKU level.



Automated rating process: ZoneBilling's built-in rating functionality ensures usage data and billing logic stay aligned, reducing errors and accelerating invoice generation.



Native NetSuite integration: Direct visibility and control without third-party connectors.



Audit-ready revenue recognition: Built-in automation that supports compliance and accurate reporting.

The Result: Faster processes, stronger accuracy, and confidence to scale

ZoneBilling has transformed how DentalXChange manages billing and contract operations. What once required extensive manual intervention is now an automated, intuitive process, embedded directly in NetSuite for full visibility.



10+ hour reduction in billing time: The finance team reduced billing setup and contract maintenance by an estimated 10-15 hours a week, freeing up time that previously went to manual calculations and



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"I definitely have no doubt that Zone will be able to support us in our next growth phase. It has been able to handle all of the complex pricing models we could throw at it so any new future ones should be a cake walk."

- John Fowler,
AVP Corporate Controller, DentalXChange

data entry. With automation handling pricing logic and renewals, billing runs that once required deep validation now close with minimal oversight.



Hours to minutes for contract management: Amendments, renewals and annual price increases that once took hours now happen in minutes. The ability to make changes at the SKU level has given finance and sales a faster, more transparent way to adapt pricing as customer needs evolve.



Improved accuracy and compliance: Automation ensures pricing rules and revenue schedules are consistently applied. With built-in audit readiness and compliance under ASC 606, DentalXChange's finance team can now generate reliable, audit-ready data without additional system exports or manual review.



5+ pricing models supported: ZoneBilling now automates DentalXChange's advanced pricing logic, from **usage-based billing** with marginal tiers to master item aggregation and included-unit tracking.



Future-proof scalability: ZoneBilling's flexible architecture ensures that as DentalXChange adds new products, pricing models, or customer segments, billing and revenue recognition will scale seamlessly. The company is now positioned for continued expansion with a billing engine built for growth and investor-grade accuracy.



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.