Zone&Co

How Benevity Inc. simplifies complex billing and revenue recognition with ZoneBilling

benevity

Benevity Inc., a SaaS solution provider, struggled as its AR teams worked in manual spreadsheets and disconnected systems for their billing and revenue recognition. These outdated processes created delays and errors that slowed down cash flow and made compliance increasingly complex.

Everything changed when Benevity used ZoneBilling to embed revenue operations directly inside NetSuite. But they didn't stop there, Zone helped them align Salesforce CPQ with their ERP to create a single source of truth. Manual entry dropped by 30 hours each week. Revenue close accelerated by 1.5 days. And for the first time, finance could redirect energy from spreadsheets and re-keying to what really mattered: strengthening collections, delivering consistent ARR reporting for leadership and investors and creating more space for the team to focus on strategic, value-add work.

The Challenge: Manual billing and revenue processes slowing growth

As the company grew, so did the AR obstacles. Slowdowns and bottlenecks that were tolerable for a startup were no longer acceptable in an era of private-equity-backed expansion. At the

Benevity Inc. is a global SaaS leader in corporate purpose software – they help companies do good in the world while maintaining compliance and showing their impact.

www.benevity.com

Industry: Software

Headquarters: Calgary, Alberta

Company size: 1000

Customer since: 2024

Products: ZoneBilling

Integrated software: NetSuite, Salesforce

Implementation partner: Accordion Partners

Involved teams: Salesforce Admins, Order to cash (AR, Revenue)

Key Outcomes:

◆ **30 hours** of manual entry and revenue recognition saved per week

◆ **1 headcount** reduction when automation eliminated reliance on a long-time contractor

◆ **1.5 days** faster closing

> ❝
>
> "We were in a work environment where everything from order entry, invoicing and revenue recognition were done in a manual way... this led to delays in getting invoices out the door."
>
> **- Don Gill**
> Order-to-Cash Manager, Benevity Inc.

same time, increasingly complex billing scenarios from new customers pushed the limits of what could reasonably be managed without automation.

◆ **Manual processes:** The lack of automation led to delays in getting invoices out the door and required constant intervention to replicate data between Salesforce and NetSuite. As Benevity's billing and revenue arrangements grew more complex – with frequent amendments, non-standard billing requirements and multi-year contracts – the risk of errors and inefficiencies only increased.

◆ **Data replication and delays:** Because Salesforce and NetSuite were not connected, the finance team had to manually transfer order information between the two systems. Each amendment or contract change required re-keying data into NetSuite, which created bottlenecks and slowed down the entire invoicing cycle. These inefficiencies made it harder to maintain consistency between platforms, introducing discrepancies that needed further manual checks.

◆ **Complex billing arrangements:** Each exception or adjustment added another layer of manual intervention, making it increasingly difficult to scale operations alongside the company's growth.

◆ **Compliance risks:** The introduction of ASC 606 revenue recognition requirements intensified the challenge. Managing performance obligations, allocating revenue and producing audit-ready reports with manual tools exposed Benevity to unnecessary risk. The finance team needed a solution that could automate compliance processes and ensure accuracy, while reducing the strain of preparing for audits.

What did they decide?

The team set their sights on a solution purpose-built to handle contract complexity without adding more manual work. Their goal was to bring Salesforce CPQ and NetSuite into alignment so that data would flow consistently across systems and ARR reporting would always be accurate.

"ZoneBilling has allowed us to automate manual and repetitive work tasks – streamlining the overall process and allowing our team to focus on the value-add tasks."

- **Don Gill**
Order-to-Cash Manager, Benevity Inc.

The Solution: Automated billing, Salesforce alignment and audit-ready revenue in NetSuite

Benevity partnered with Zone to modernize its order-to-cash process inside NetSuite. They selected **ZoneBilling** to automate billing, align Salesforce CPQ data with NetSuite and streamline revenue recognition.

Their billing model required it. Benevity supports a wide range of complex arrangements and only a NetSuite-native billing engine could manage it all seamlessly:

✔ **Amendments and contract changes** need to flow directly from Salesforce CPQ into NetSuite without re-keying.

✔ **Non-standard billing r**equirements that don't fit neatly into "out-of-the-box" ERP tools.

✔ **Multi-year agreements** with varying revenue schedules and compliance requirements under ASC 606.

Don Gill, Order-to-Cash Manager, worked closely with implementation partner **Connor Group** to scope and test the setup against Benevity's unique scenarios. Over a 3-4 month rollout, they connected Salesforce and NetSuite into one single source of truth, ensuring customer, product and contract data stayed consistent across platforms.

With ZoneBilling in place, Benevity's AR team stabilized invoicing, automated revenue recognition through NetSuite and eliminated the manual spreadsheets that once consumed hours of every billing cycle. Features like consolidated invoicing, flexible billing frequencies and multiple bill-to addresses within singular orders gave them the agility to scale without adding headcount.

The Results: 30 hours saved weekly, faster revenue close and audit-ready compliance

ZoneBilling transformed Benevity's billing and revenue operations into a streamlined, NetSuite-native process. What once took days of manual work across spreadsheets now happens automatically, freeing finance to focus on higher-value activities like collections and cash flow optimization.

The impact went well beyond efficiency gains:

30 hours saved weekly on manual entry: By eliminating spreadsheet-driven invoicing and syncing Salesforce CPQ directly with NetSuite, Benevity cut down data entry tasks by up to 30 hours per week. That time now goes into collections and strategic projects rather than re-keying information.

Revenue closed up to 1.5 days faster: With automated revenue schedules in NetSuite, the team shaved more than a day off month-end close, ensuring faster reporting and greater visibility for leadership and investors.

Headcount savings through reduced manual work: Benevity was able to remove reliance on one of its long-standing contractors, saving costs while achieving higher accuracy and better timeliness in billing.

Audit-ready compliance under ASC 606: ZoneBilling's automated revenue rules gave the finance team confidence heading into audits. What used to be a painstaking manual review is now a smooth, predictable process.

Improved cash flow and PE reporting: With accurate invoices and automated data alignment, Benevity has strengthened collections, improved cash predictability and met KPIs set by their PE sponsor, HG Capital. Consistent ARR reporting now provides leadership and investors with a reliable view of growth.

"

"ZoneBilling has allowed us to automate repetitive work tasks. We've streamlined the overall process and now our team can focus on the value-add tasks."

- **Don Gill**
Order-to-Cash Manager, Benevity Inc.

NetSuite-embedded billing automation

Benevity is a shining example of NetSuite-native automation transforming order-to-cash for growing SaaS businesses. ZoneBilling replaced hours of manual invoicing and revenue recognition with a streamlined, automated process embedded directly in NetSuite. The integration with Salesforce CPQ ensured a single source of truth for customer and contract data, while NetSuite ARM enabled automated, audit-ready revenue recognition.

What began as a search for billing automation evolved into a broader finance transformation – faster month-end close, reduced headcount costs, improved collections and consistent ARR reporting that gives executives and their PE sponsor confidence in the numbers.

Zone&Co

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.