

SaaS Billing Setup Checklist

This checklist provides a detailed, actionable path to establishing a robust SaaS billing system. Tick off each item as you complete it to ensure a smooth and efficient process.

Planning and Strategy

- ☐ Clearly define your target audience and their billing preferences.
- ☐ Determine your core pricing model (flat-rate, tiered, usage-based, etc.).
- ☐ Outline all potential pricing variations, including discounts, promotions, and add-ons.
- ☐ Research and compare at least three SaaS billing platforms (e.g. *PayPro Global*)
- ☐ Assess your integration needs with CRM, ERP, accounting, and analytics tools.
- ☐ Document your desired billing workflows (new subscription, upgrades, downgrades, cancellations).
- ☐ Establish clear policies for payment failures, refunds, and disputes.
- ☐ Determine your tax obligations based on customer locations (VAT, GST, sales tax).
- ☐ Plan your customer communication strategy for billing-related events (invoices, payments, renewals).
- ☐ Define key SaaS billing metrics you will track (MRR, churn, CLTV).

Platform Selection and Configuration

- ☐ Select a SaaS billing platform that aligns with your needs.
- ☐ Set up your company profile and branding within the billing platform.
- ☐ Configure your defined pricing models and plans within the system.

- ☐ Integrate your chosen payment gateways (offer multiple options if possible).
- ☐ Establish rules for automated recurring invoice generation.
- ☐ Customize your invoice template with all necessary information (company details, customer info, itemized charges, taxes, payment terms).
- ☐ Set up proration rules for mid-cycle subscription changes.
- ☐ Configure automated reminders for upcoming and overdue invoices.
- ☐ Implement a dunning management system with automated retry logic and customer notifications.
- ☐ Set up tax calculation & collection based on customer locations.
- ☐ Configure currency conversion if you have international customers.
- ☐ Establish user roles for your team accessing the billing system.

Customer Account and Subscription Management

- ☐ Define the data fields required for customer accounts.
- ☐ Set up the process for new customer onboarding and subscription creation within the billing system.
- ☐ Implement self-service options for customers to manage their accounts and subscriptions (update details, view invoices, upgrade/downgrade).
- ☐ Establish workflows for handling subscription upgrades, downgrades, and cancellations.
- ☐ Configure notifications for successful subscriptions, changes, and cancellations.
- ☐ Set up usage tracking if you have usage-based pricing.
- ☐ Define how to apply discounts and promotions to customer accounts.
- ☐ Set up payment reminders for customers.

Invoicing and Payment Processing

- ☐ Test the automated recurring invoice generation process thoroughly.
- ☐ Verify that all necessary information is correctly displayed on invoices.
- ☐ Ensure that tax calculations are accurate based on customer locations.
- ☐ Confirm that currency conversions are working correctly (if applicable).
- ☐ Test the payment processing flow with different payment methods.
- ☐ Verify that payment confirmations are sent to customers.
- ☐ Set up automated notifications for failed payments.
- ☐ Establish a process for manually processing offline payments (if necessary).
- ☐ Configure the system to record all payment transactions accurately.
- ☐ Set up a clear process for handling refunds.

Monitoring, Analysis, and Optimization

- ☐ Set up your reporting and analytics dashboards to track key SaaS billing metrics.
- ☐ Regularly monitor your billing performance and identify any issues.
- ☐ Analyze customer payment behavior and identify potential trends.
- ☐ Monitor the effectiveness of your dunning management process.
- ☐ Gather customer feedback on the billing process.
- ☐ Identify areas for optimization in your pricing, billing workflows, and communication.
- ☐ Ensure ongoing compliance with relevant tax and legal regulations.