

# Subscription hyper automation

## Maximize automation, gain efficiency

### The hyper automation way:

1. Determine how subscriptions are captured in terms of duration, billing cycles and subscription line items in LISA
2. Approve and publish new subscriptions
3. Run HARP to create all action needed
4. Firm and post each action



**Unlock subscription business**

HARP

**Why actions?**  
Actions are the counted units we generate to automate each step in the subscription lifecycle. The value we bring is based on reducing manual action management, by automating the below actions. As we position LISA as a key solution for Subscription management, the license plans reflect that commercially as well.

**Determine subscription actions volume**

1. Generate sales order invoice lines
2. Revenue recognition actions
3. Generate security deposit request
4. Request for deposit payment
5. Generate purchase order
6. Cost recognition actions
7. Renewal approval
8. Monitoring of entitlement usages in project and meterage

**Sales invoice line actions**  
Determine the average monthly volume of subscription invoice lines

**Revenue recognition actions**  
Determine the average monthly volume of LISA recognized revenue actions per month

**Security and normal deposit actions**  
Determine the average monthly volume of deposit actions resulting in request for payment (usually upfront)

**Purchase order line actions**  
Determine the average monthly volume of purchase line (back to back with sales lines or stand alone) actions

**Cost recognition actions**  
Determine the average monthly volume of cost recognition actions based on purchased subscriptions

**Renewal approval actions**  
Determine the average monthly volume of renewal approvals of existing subscription agreements

**Entitlement monitoring actions**  
Determine monthly entitlement action volume based on pay-per-use or consumption or entitlements



Use LISA and Microsoft Dynamics 365 Business Central or Finance and Operations to streamline your subscription lifecycles.



LISA HARP will generate all billing, renewal, price updates, deposits, purchase, recognition actions and you firm and post, resulting in a tidy and up to date subscription process.

## Extend with Power Automate

Go over and beyond

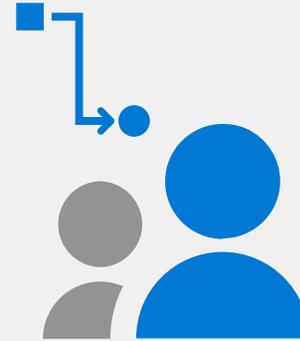


All LISA business applications for Microsoft Dynamics 365 can be extended with Microsoft Power Automate, so you can build cross-department and cross-application flows, maximizing collaboration and fine-tuned automation.

Your team will focus on processing actions and approvals, with minimal human intervention.



# Design and deploy deep process automation with LISA's HARP and Microsoft Power Automate



Bluefort's LISA uses Microsoft Power Platform



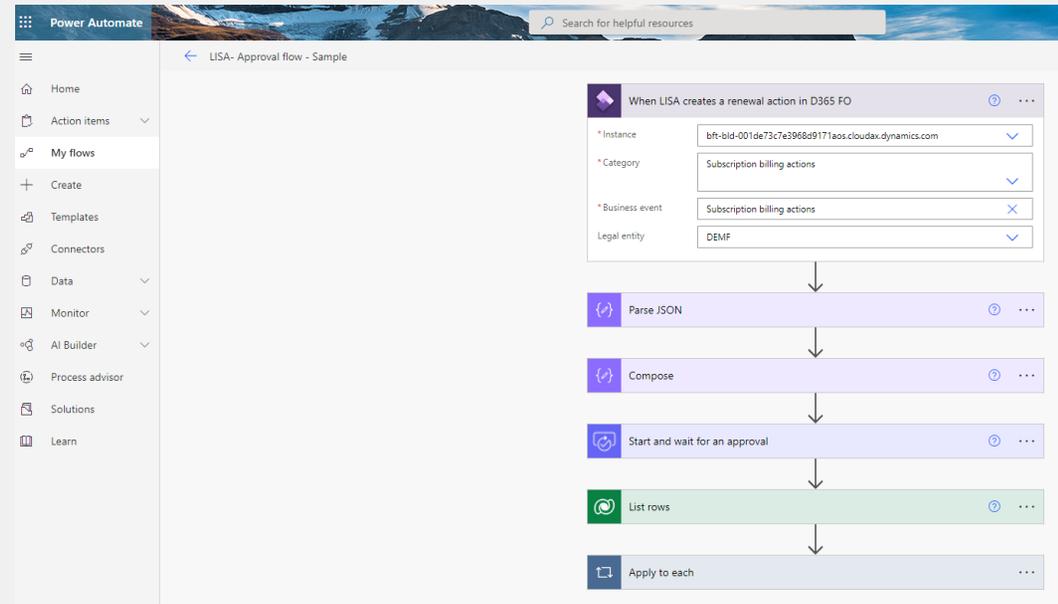
## Hyper automating subscriptions across teams

Subscription actions | GENERATE PURCHASE ORDER | DEMF-214102

SaaS view (No POs)

Subscription plan	Reason	Subscription status	Action category	Action type	Date from	Date to	Customer account	Item number	Product name	Quantity	Price	Unit	MTA #
DEMF-001013	NEW	DEMF-144842	Historical	Generate sales order invoice	17/03/2022	16/03/2023	7878787	500100	SaaS - Administrator	100.00	62.40	pcs	1.5
DEMF-001013	NEW	DEMF-144843	Historical	Generate sales order invoice	17/03/2022	16/03/2023	7878787	400100	SaaS - Chemical Manager 100 SDS	1.00	60,000.00	pcs	11.4
DEMF-001013	NEW	DEMF-144844	Finalized	Renewal approval	17/03/2022	16/03/2024	7878787	400100	SaaS - Chemical Manager 100 SDS	1.00	60,000.00	pcs	
DEMF-001013	NEW	DEMF-144845	Finalized	Renewal approval	17/03/2022	16/03/2024	7878787	500100	SaaS - Administrator	100.00	0.42	pcs	
DEMF-001013	RENEWAL	DEMF-144846	Historical	Generate sales order invoice	17/03/2022	16/03/2024	7878787	400100	SaaS - Chemical Manager 100 SDS	1.00	60,000.00	pcs	11.4
DEMF-001013	RENEWAL	DEMF-144847	Historical	Generate sales order invoice	17/03/2022	16/03/2024	7878787	500100	SaaS - Administrator	100.00	0.42	pcs	
DEMF-001014	NEW	DEMF-144848	Historical	Generate sales order invoice	17/03/2022	16/03/2023	7878787	400100	SaaS - Chemical Manager 100 SDS	1.00	60,000.00	pcs	11.4
DEMF-001014	NEW	DEMF-144849	Finalized	Renewal approval	17/03/2022	16/03/2024	7878787	400100	SaaS - Chemical Manager 100 SDS	1.00	60,000.00	pcs	
DEMF-001014	RENEWAL	DEMF-144850	Historical	Generate sales order invoice	17/03/2022	16/03/2024	7878787	400100	SaaS - Chemical Manager 100 SDS	1.00	60,000.00	pcs	11.4
DEMF-001022	NEW	DEMF-144859	Historical	Generate sales order invoice	22/03/2022	21/03/2023	7878787	500100	SaaS - Administrator	1.00	0.42	pcs	
DEMF-001022	NEW	DEMF-144860	Historical	Generate sales order invoice	22/03/2022	21/03/2024	7878787	500100	SaaS - Administrator	1.00	0.89	pcs	
DEMF-001024	NEW	DEMF-144861	Historical	Generate sales order invoice	01/01/2022	31/12/2022	7878787	400100	SaaS - Chemical Manager 100 SDS	1.00	60,000.00	pcs	11.4
DEMF-001024	NEW	DEMF-144862	Historical	Generate sales order invoice	01/01/2022	31/12/2023	7878787	400100	SaaS - Chemical Manager 100 SDS	1.00	60,000.00	pcs	12.5
DEMF-001024	NEW	DEMF-144863	Historical	Generate sales order invoice	01/01/2024	31/12/2024	7878787	400100	SaaS - Chemical Manager 100 SDS	1.00	60,000.00	pcs	12.5
DEMF-001025	NEW	DEMF-144864	Historical	Generate sales order invoice	01/04/2022	31/03/2023	7878787	400100	SaaS - Chemical Manager 100 SDS	1.00	60,000.00	pcs	11.4
DEMF-001025	NEW	DEMF-144865	Historical	Generate sales order invoice	01/04/2022	31/03/2024	7878787	400100	SaaS - Chemical Manager 100 SDS	1.00	60,000.00	pcs	12.3
DEMF-001028	NEW	DEMF-144873	Historical	Generate sales order invoice	01/04/2022	31/03/2023	7878787	400200	SaaS - Chemical manager 200 SDS	1.00	96,000.00	pcs	18.0
DEMF-001028	NEW	DEMF-144874	Historical	Generate sales order invoice	28/03/2022	28/03/2023	7878787	500100	SaaS - Administrator	1,000.00	0.00	pcs	7
DEMF-001041	NEW	DEMF-144876	Historical	Generate sales order invoice	28/03/2022	28/03/2023	7878787	400100	SaaS - Chemical Manager 100 SDS	1.00	60,000.00	pcs	11.4
DEMF-001041	RENEWAL	DEMF-144877	Historical	Generate sales order invoice	28/03/2022	28/03/2024	7878787	400100	SaaS - Chemical Manager 100 SDS	1.00	60,000.00	pcs	11.4
DEMF-001046	NEW	DEMF-144880	Historical	Generate sales order invoice	15/04/2022	16/04/2023	7878787	400100	SaaS - Chemical Manager 100 SDS	1.00	60,000.00	pcs	11.4
DEMF-001054	NEW	DEMF-144880	Finalized	Generate sales order invoice	06/04/2022	05/04/2023	7878787	400100	SaaS - Chemical Manager 100 SDS	1.00	60,000.00	pcs	11.4
DEMF-001126	NEW	DEMF-140135	Not finalized	Renewal recognition entry	27/04/2022	26/04/2023	7878787	H7878787-PR-02	Financial automation of renewal recogni...	1.00	0.00	pcs	
DEMF-001126	NEW	DEMF-140137	Not finalized	Renewal recognition entry	27/04/2022	26/04/2023	7878787	780101	SaaS Platform ERP integration CRM	1.00	2,400.00	PLM/HR	4
DEMF-001127	NEW	DEMF-140139	Not finalized	Renewal recognition entry	27/04/2022	26/04/2023	7878787	H7878787-PR-02	Financial automation of renewal recogni...	1.00	0.00	pcs	
DEMF-001127	NEW	DEMF-140141	Not finalized	Generate sales order invoice	27/04/2022	26/04/2023	7878787	780101	SaaS Platform ERP integration CRM	1.00	2,400.00	PLM/HR	4

With LISA's HARP your design different events and actions to be created when subscription require them. HARP generates actions for all your subscription plans, ranging from billing to purchase actions, ensuring you follow up in the moment needed.



Every event within a subscription lifecycle is captured and can be used to trigger Power Automate flows for further cross-app automation. Use Microsoft Teams to approve or reject renewals. Send emails with updates to your customers, for example after an indexation has been applied.

# Win customers and keep them moving forward



Start with Sales apps and extend your customer experience at your pace. Connect with Subscription ERP and go full cycle.



Get ARR, ACV, Customer Lifetime Value, Churn and Net Revenue Retention Rates reports in your dashboard.



Extend and build more dashboards and reports using the power of LISA BusinessPro and Microsoft PowerBI

When you run LISA and Microsoft Dynamics 365, you have the business apps you need to run your subscription automation and provide an awesome customer experience.

CHANNELS & STAKEHOLDERS	D365 SALES, PORTAL, COMMERCE OR WEB FRONT-END									
	LICENSE AND SUBSCRIPTION AUTOMATION									
MODERNIZE FINANCE	SUBSCRIPTION DATA ANALYTICS									
	ACCOUNTS RECEIVABLES	CHANGE MANAGEMENT	BOX SUBSCRIPTIONS	PROJECT INTEGRATION	INQUIRIES AND REPORTS	PROJECT HOUR ENTITLEMENT MANAGEMENT	SUBSCRIPTION CONSUMPTION MODEL			
	ACCOUNTS PAYABLE	PAYMENT MANAGEMENT	DEPOSIT CONTROL	SALES ORDER INTEGRATION	ACTION AUTOMATION	WORKFLOW INTEGRATION	REVENUE RECOGNITION			
			RENEWAL CONTROL		AUDIT TRAIL	DELIVERY SCHEDULES	PROGRAM TYPES			
	FINANCIAL MANAGEMENT (CFO, FM, BM)	SUBSCRIPTION PRODUCT PORTFOLIO	CREDITING SUBSCRIPTIONS	PURCHASE ORDER INTEGRATION	FORECASTING ACV	WORKFLOW APPROVAL	BILLING POSTING PROFILES			
			RENEWAL OPT-IN		NOTIFICATION MANAGEMENT	SUBSCRIPTION PER USE MODEL	COMMERCIAL TEMPLATES			
		SUBSCRIPTION PRICING AND DISCOUNTS	SECURITIES	EAM INTEGRATION	AR INTEGRATION	PERPETUAL SUBSCRIPTION MODEL	BUSINESS EVENTS			
			MANAGE CHURN		AP INTEGRATION					
	OPERATIONS		AUTOMATION		REPORTING		PROCESSING		DEFINE	
	Efficiently manage renewals, prevent revenue leaks and change orders		Automates the Customer Sales Order with back-to-back Purchase Order to Suppliers		Flexible reporting extendable through Power BI		Batching, Firming of Subscription Actions Forecast Subscriptions with custom date ranges and scenarios like unpublished subscriptions and check you ACV		Notifications for business events with Power Automate Flexible Commercial templates – deposits, securities, billing frequency, periods, rolling, calendar, Posting profiles – revenue recognition, VAT considerations Journal definitions, Automatic firming, posting, settlement	

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