



Discover **LISA BusinessPro**

Licence and Subscription Automation

LISA BusinessPro is the enterprise grade solution for subscription business models that automates functions throughout international organisations dealing with high volumes of subscriptions.

Overview

This document provides insights into the positioning and capabilities of LISA Business Pro. It is intended for Microsoft Dynamics 365 Finance and Operations partners, and customers that require subscription management capabilities for medium and enterprise-sized businesses.

LISA BusinessPro is designed for subscription management, from selling to billing subscriptions and dealing with the financial outcomes, such as revenue recognition, purchasing subscriptions, handling payments or deposits and financial reporting.

Capabilities

LISA BusinessPro is a SaaS offering that is designed to run within Microsoft Dynamics 365 Finance and Operations, a cloud business management solution meant for midmarket and enterprise size businesses. LISA provides subscription-based capabilities that extends Finance and Operations.

Together, LISA and Finance and Operations offer a modern and flexible cloud-based ERP application that work seamlessly together, along with your other Microsoft 365 applications.

In a Nutshell:

- Designed and built for medium and enterprise-sized businesses in the subscription space
- LISA BusinessPro is a subscription application built for Microsoft Dynamics 365 Finance and Operations
- LISA BusinessPro can be extended with LISA Reach for Customer and Sales focused processes
- LISA BusinessPro is a 100% SaaS offering based on a subscription plan
- LISA BusinessPro is delivered via a network of Microsoft Dynamics 365 Finance and Operations partners
- LISA BusinessPro is built on the latest cloud platform and apps offering performance, security and easy use

Who is LISA BusinessPro for?

LISA BusinessPro is designed for subscription leaders who are working to engage customers with subscription models driving recurring interaction and consequent billing and operations.

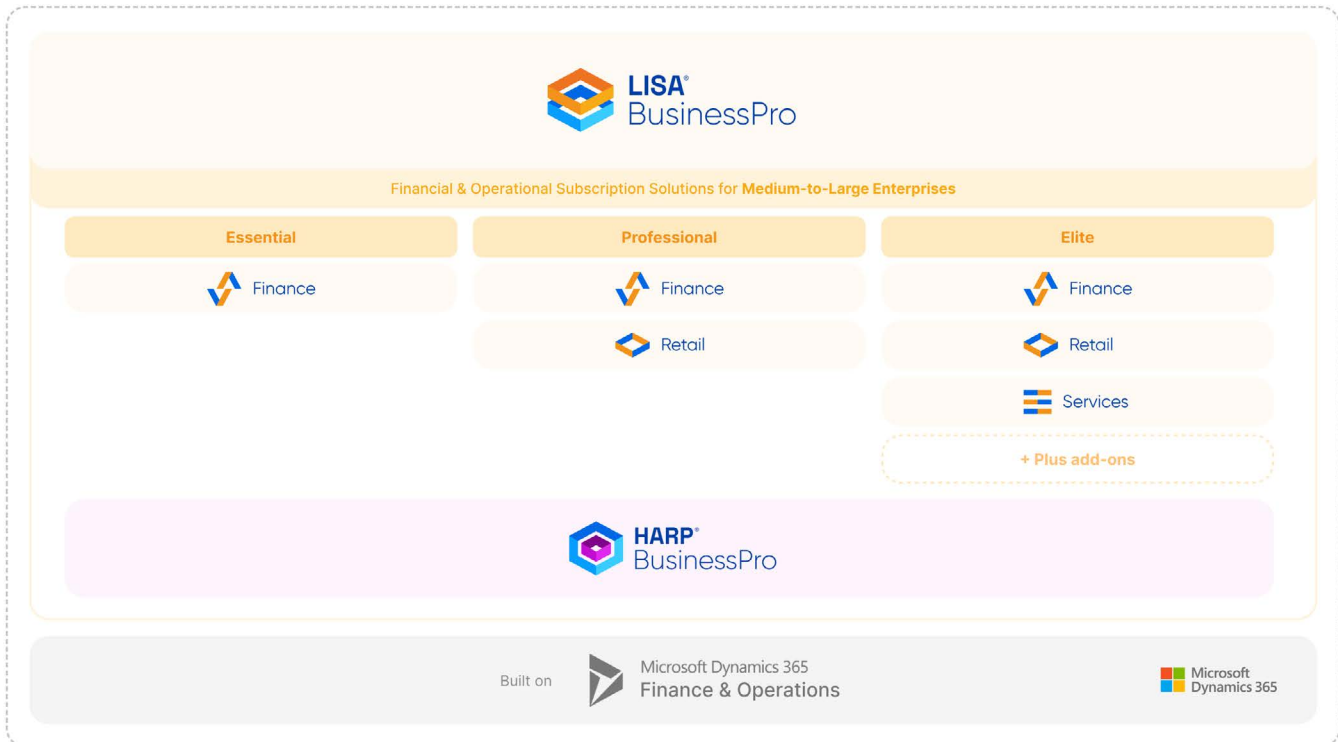
Subscription business leaders are powered by customer obsession and efficiency. They are innovators, dreamers, and builders – leading the way with game-changing business visions, teamwork, and grit. LISA BusinessPro is a business application that helps them to accomplish their goals, by providing business process automation and solid management of subscription sales and operations.

LISA BusinessPro runs in conjunction with different products that are part of Finance and Operations, these products are:

- Microsoft Dynamics 365 Finance
- Microsoft Dynamics 365 Supply Chain Management
- Microsoft Dynamics 365 Commerce

This allows LISA BusinessPro to run subscription models for businesses in retail box subscriptions, project-based subscriptions, and consumption based and pay-per-unit (SaaS) subscriptions. Using enterprise grade process support, LISA BusinessPro can deal with a wide array of processes in the subscription space.

What does LISA BusinessPro do?



LISA BusinessPro enables businesses to offer consumption based, pay-per-unit (SaaS) subscriptions, retail box subscriptions and project (effort entitlement) based subscriptions. Extending over the enterprise grade processes of Dynamics 365 Finance, Supply Chain and Commerce, LISA BusinessPro can deal with an extensive array of processes that are essential for subscription businesses to thrive.

 Finance

LISA BusinessPro Finance is the heart of this subscription solution. It manages your subscription plans for your customers and drives financial transactions for revenue and costs, dealing with your IFRS or ACS 606 revenue recognition needs.

It is strongly integrated with all financial modules in Microsoft Dynamics 365 Finance. LISA BusinessPro Finance is part of all licence plans in LISA BusinessPro and can also be purchased alone, as well with the Essential plan.

 Retail

You can add LISA BusinessPro Retail to expand your subscription model into B2C retail box subscriptions. An application designed to bring subscription management applications to retailers.

Integrate with your eCommerce stores and capture customer subscriptions for media, content, and product delivery schedule. LISA BusinessPro Finance and LISA BusinessPro Retail are bundled in the Professional plan.

 Services

The professional services industry is moving rapidly to new subscription-based models, such as managed services or continued customer success engagements. The common denominator is a model that provides a steady stream of service on a periodic basis, with a recurrent fee attached. This creates a balanced budget scenario for customers, with a predictable and consistent service.

These new subscription service models are mapped to the LISA BusinessPro Services application. Connect your project services to a subscription plan driving recurring revenue, and design your services using the power of the project management and accounting capabilities within Microsoft Dynamics 365 Finance and Operations. LISA BusinessPro Services is bundled with Retail and Finance into the Elite plan.

How can LISA BusinessPro help subscription businesses?

A modern business application for companies in the subscription space needs to provide smart capabilities, and be easy to use.

LISA BusinessPro provides the following capabilities:

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	AP INTEGRATION	PERPETUAL SUBSCRIPTION MODEL	BUSINESS EVENTS
						MANAGE CHURN	

OPERATIONS Efficiently manage renewals, prevent revenue leaks and change orders	AUTOMATION Automates the Customer Sales Order with back-to-back Purchase Order to Suppliers	REPORTING Flexible reporting extendable through Power BI	PROCESSING Batching, Firming of Subscription Actions Forecast Subscriptions with custom date ranges and scenarios like unpublished subscriptions and check you ACV	DEFINE 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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LISA BusinessPro supports the following subscription models:

- Per-unit agreements with upfront billing
- Per-unit agreements, upfront billing with entitlements tracking
- Usage based agreements, with billing in arrears with entitlement tracking
- Usage based agreements, tracking hour consumption entitlements in projects
- Retail box subscription agreements
- Pay-Per-Use model
- Supplier subscription management

The business application model is designed for capturing the subscription plan and its lines and a hyper automation batch service called HARP (Hyper Automation Rapid Processing). The HARP service runs over all subscription plans and outputs the right actions to execute:

Solution Architecture

HARP BusinessPro



HARP BusinessPro batch-service Microsoft Dynamics 365 Finance and Operations Batch operated process that runs on recurrence pattern to generate subscription actions based on the setup in the subscriptions groups.

Actions created are colour coded and require follow up by firming them manually or automatically.

Subscription action list

- Generate sales order invoice lines
- Revenue recognition
- Generate security deposit request
- Request for deposit payment
- Generate purchase order lines
- Cost recognition
- Renewal approval
- Monitoring of entitlements

Actions processing runs

- Subscription sales order invoice
- Project subscription order
- Payment journal for deposit collection
- Purchase order
- Business event trigger for renewal email

Actions HARP can automate are:

- Sales billing
- Renewal authorisation
- Renewal billing
- Creating subscription purchase orders
- Revenue recognition entries
- Cost recognition entries
- Process future credits and cancellations
- Capturing deposits or pre-payments

With these capabilities you can streamline the complete lead-to-order process, leaving you to focus on making your business more effective.

Solving today's subscription business challenges

At Bluefort we team up with various customers around the world. Our objective is to learn and understand real world business scenarios and map out how LISA BusinessPro can support them. The primary business challenges and objectives we focus on include:

Streamlining and simplifying lead-to-cash processes

Many companies are focused on generating product or service value for their customers. As they evolve, we naturally see that sales, operations and finance tend to end up as stand-alone departments, resulting in processes that are not always effective and efficient. Flipping that challenge into potential, we designed LISA BusinessPro to run from lead to cash in a data driven flow of events.

Beginning with the sales team managing new customers in Finance and Operations, you can manage subscription quotes in LISA BusinessPro and create reports showing the total open subscription pipeline value.

Find out more here →

<https://docs.microsoft.com/en-us/dynamics365/supply-chain/sales-marketing/overview-sales-marketing>

Convert quotes to subscription plans and start the first billing event and delivery of services or licences. Use the accounts receivable capabilities to drive the management of days outstanding and payment collection.

Find out more here →

<https://docs.microsoft.com/en-us/dynamics365/finance/accounts-receivable/accounts-receivable>

All the events that should result in a financial posting will be captured in the financial parts of the business applications, meaning your finance team is always up to date on reporting.

Find out more here →

<https://docs.microsoft.com/en-us/dynamics365/finance/general-ledger/general-ledger>



Tailor commercial agreements and accelerate revenue

Many companies continue to innovate and grow their range of solutions, products, and services that their customers can subscribe to. This entails frequent and dynamic changes to their offerings. Product and marketing managers require an adequate level of data management, so they can easily add new offerings, change prices, update indexes, and provide bundles and discounts to fuel the company's sales strategy.

LISA BusinessPro uses the easy-to-use product masters in Finance and Operations. In just a few moments your team can create new subscription items, and update prices and discounts reflecting campaigns or permanent commercials updates.

Find out more here →

<https://docs.microsoft.com/en-us/dynamics365/supply-chain/pim/product-information>

Fuel innovation in customer experience

Customer centricity is a leading concept for companies providing subscriptions. Companies are passionate about providing subscriptions to their customers and developing a long-lasting relationship. Frequently, they focus on providing a strong platform for customer communication. This should not be a one-time activity, but ongoing and changing over time.

With LISA BusinessPro and Microsoft Dynamics 365, you can expand your customer service experiences and tailor your digital portals and apps the way you see fit. Moreover, you can empower your customers to add, remove and upgrade subscriptions making it easier to work with you.

LISA BusinessPro has the technology to integrate with other customer facing applications, such as eCommerce sites and stores or customer portals.



Want to discover more
about LISA BusinessPro for
Microsoft Dynamics 365
Finance and Operations?

Get in touch

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