

Solution Information Sheet

License and subscription automation (LISA) Business edition.

The facts

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

LISA Business overview

This document provides insights into the positioning and capabilities of LISA Business. It is intended for Microsoft Dynamics 365 Business Central partners and customers that require subscription management capabilities. LISA Business is designed for subscription management, from selling to billing subscription and dealing with the financial outcomes, such as revenue recognition and financial reporting.

Tell me more about LISA Business

LISA Business is a SaaS offering that is designed to run within Microsoft Dynamics 365 Business Central, a cloud business management solution meant for growing small and midmarket businesses (SMBs). LISA provides subscription-based capabilities that extends those of Business Central. Together, LISA and Business Central offer a modern and flexible cloud-based ERP application that seamlessly works together with your other Microsoft 365 applications. Many SMBs are outgrowing entry level accounting systems and need additional features to get a more complete view of their business, not just financials but also abilities to operate subscription and recurring revenue business models. LISA Business is for SMB's that seek enablement of better business performance with continuous process improvements and responsiveness across their entire subscription business—not just financials.

For whom is LISA Business designed?

LISA Business is designed for SMB leaders that are working on a model that engages customers with subscription models driving recurring interaction and consequent billing and operations. SMB leaders are powered by passion. They are innovators, dreamers, and builders – blazing trails with game-changing business visions, teamwork, and grit. LISA Business is a business application that helps them to accomplish their goals, by providing business process automation and solid management of subscription sales and operations. These include individuals who:

- want to grow their business and scale up, but not by adding headcount and administrative overhead. This SMB buyer might not be the owner or CEO (Chief Executive Officer).
- have multiple roles within their businesses. An owner, for example, is likely to be the head of marketing, CIO (Chief Information Officer), and the operations leader. Playing multiple roles is common until the company reach about 100 employees. Beyond this size roles start to delineate, and functional departments form.
- are seeking ideas to particular problems, not a product or a brand. They are looking for solutions and fixes to burning business issues—and they do not have time to research a lot of different vendors or evaluate multiple solutions.

How can LISA Business help SMBs in the subscription space?

A modern business application for SMBs in the subscription space needs to provide smart capabilities yet be easy to operate with an elevated level of user friendliness.

With LISA Business you get the following capabilities:

1. Manage your financials, tax, and general master details in Business Central.
2. Run your accounts payable and receivable in Business Central.
3. Build subscription programs and link them to subscription products.
4. Oversee your subscription product portfolio.
5. Manage legacy and new products and define the commercial aspects of each offering.
6. Assign the right prices and potential discounts.
7. Define the unit-based model, such as per-user-per-month, or design a bundle or plan (for example Silver, Gold, Platinum) based on the product offering.
8. Master your sales process by offering subscription quotes to your customers and prospects.
9. Convert won quotations for subscriptions into subscriptions plan and track sales statistics.
10. Drive the subscription order-to-cash process, including renewals and billing using HARP, LISA's action processing engine.
11. Automate revenue recognition

As an outcome, you are empowered to streamline the complete lead-to-order process, so you can focus on growing your business.

The screenshot displays the Dynamics 365 Business Central interface for a Sales Quote. The header shows the document type as 'Sales Quote' and the customer as '1005 - The Cannon Group PLC'. The status is 'Open'. The 'Subscription Management' section includes fields for 'Is Subscription Order' (checked), 'Global Start Date' (26/04/2022), and 'Fixed Cycles Before Renewal'. The 'Lines' table lists a single line item: 'LISA Business annual plan' (Item No. 70063, Description: LISA Business annual plan, Location Code: BLUE, Quantity: 5, Unit Price: 999.00, Line Amount: 4,495.50). The 'Invoice Details' section shows the subtotal, VAT, and total amounts. The 'Shipping and Billing' section is also visible. On the right, the 'Sell-to Customer Sales History' and 'Sales Line Details' panels provide additional context and data.

Type	No.	Item Reference No.	Description	Location Code	Quantity	Qty. to Order	Unit of Measure	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	Qty. to
Item	70063		LISA Business annual plan	BLUE	5	0	PCS	999.00	10	4,495.50	

Subtotal Excl. VAT (GBP)		Invoice Discount %	Total VAT (GBP)
4,495.50		0	1,123.88

Inv. Discount Amount Excl. VAT		Total Excl. VAT (GBP)	Total Incl. VAT (GBP)
0.00		4,495.50	5,619.38

Invoice Details	
26/01/2023	114.80

Sales Line Details	
Item No.	70063
Required Quantity	5
Attachments	0
Documents	0
Availability	0
Shipment Date	26/01/2023
Item Availability	0
Available Inventory	0
Scheduled Receipt	0
Reserved Receipt	0
Reserved Requirements	0

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 Business can support them. The primary business challenges and objectives we focus on include:

Breaking down departmental silos and unifying lead-to-cash processes

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

Starting with the sales team managing new customers in Business Central, you can manage subscription quotes in LISA Business and report over the open subscription pipeline value.

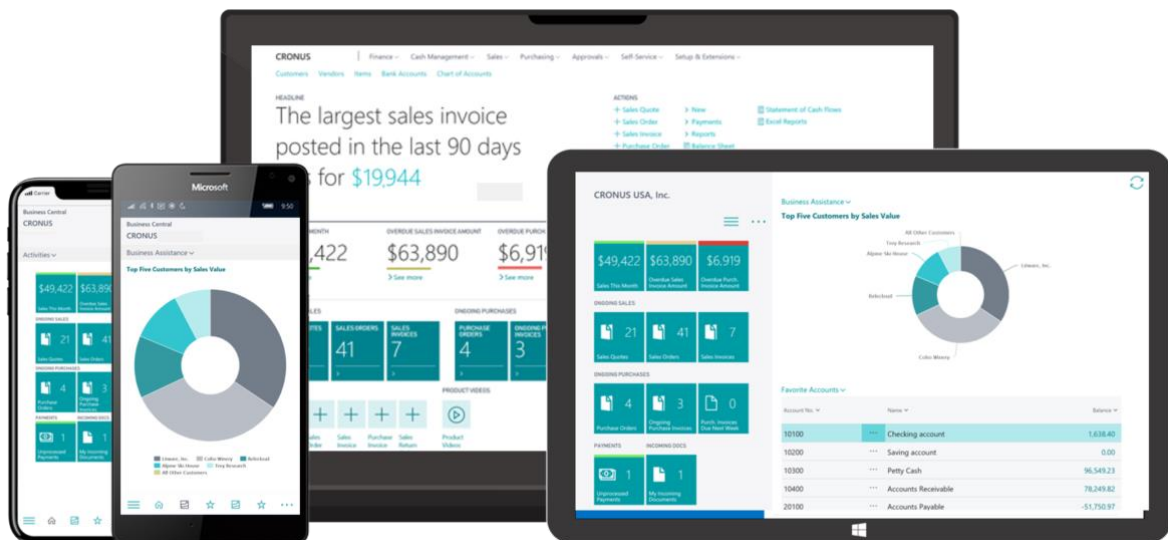
Read more 🖱️ <https://docs.microsoft.com/en-us/dynamics365/business-central/sales-manage-sales>.

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

Read more here 🖱️ <https://docs.microsoft.com/en-us/dynamics365/business-central/sales-how-invoice-sales>

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

Read more here 🖱️ <https://docs.microsoft.com/en-us/dynamics365/business-central/finance>



[Picture link](#)

Master your subscription portfolio and commercials

Many SMBs innovate and grow their portfolio of solutions, products, and services that their customer can subscribe to. This entails frequent and dynamic changes to their offerings.

Product and marketing managers require 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 Business uses the easy-to-use items master in Business Central. In just a few moments your team can create new subscription items, update price and discounts, reflecting campaigns or permanent commercials updates.

Find out more here [👉 https://docs.microsoft.com/en-us/dynamics365/business-central/inventory-how-register-new-items](https://docs.microsoft.com/en-us/dynamics365/business-central/inventory-how-register-new-items)

The screenshot displays the 'Item Card' for '70063 - LISA Business annual plan' in Dynamics 365 Business Central. The interface is organized into several sections:

- Item Section:** Contains fields for 'No.' (70063), 'Blocked' (toggle), 'Base Unit of Measure' (USERS), 'Description' (LISA Business annual plan), 'Type' (Non-inventory), and 'Item Category Code' (MSC).
- Costs & Posting:** Includes a 'Unit Price' field set to 0.00 and a 'Purchase' button.
- Prices & Sales:** Features 'Unit Price Per Month' (999.00), 'Unit Price Per Day' (33.00), 'Profit %' (0.00), 'Sales Unit of Measure' (USERS), 'Sales Prices & Discounts' (with a 'Create New...' button), and 'Sales Blocked' (toggle).
- Replenishment:** Includes a 'Purchase' button.
- Subscription Management:** Contains 'Is Subscription Item' (toggle), 'Default Program Type' (CSP), 'Auto Add-On' (toggle), 'Offer Id' (21376218g27a761), 'Default Subscription Type' (Per Unit Subscriptions), and 'Add-on' (toggle).
- Right Panel:** Shows 'Details' and 'Attachments (1)'. It includes a 'Picture' section with the 'LISA Business' logo and an 'Item Attributes' section with a table for attributes and values.

Putting your customer on centre stage

Customer centricity is a leading concept for companies providing subscriptions. SMBs 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 Business and Microsoft Dynamics 365, you can expand your customer services 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 Business has the technology to integrate with other customer facing applications, such as eCommerce sites and stores or customer portals.

Get in touch

Would you like to discover more about Bluefort's LISA Business for Microsoft Dynamics 365 Business Central?

Reach out to us

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<https://bluefort.eu/contact/>