

FACTSHEET

BILL-TO 365

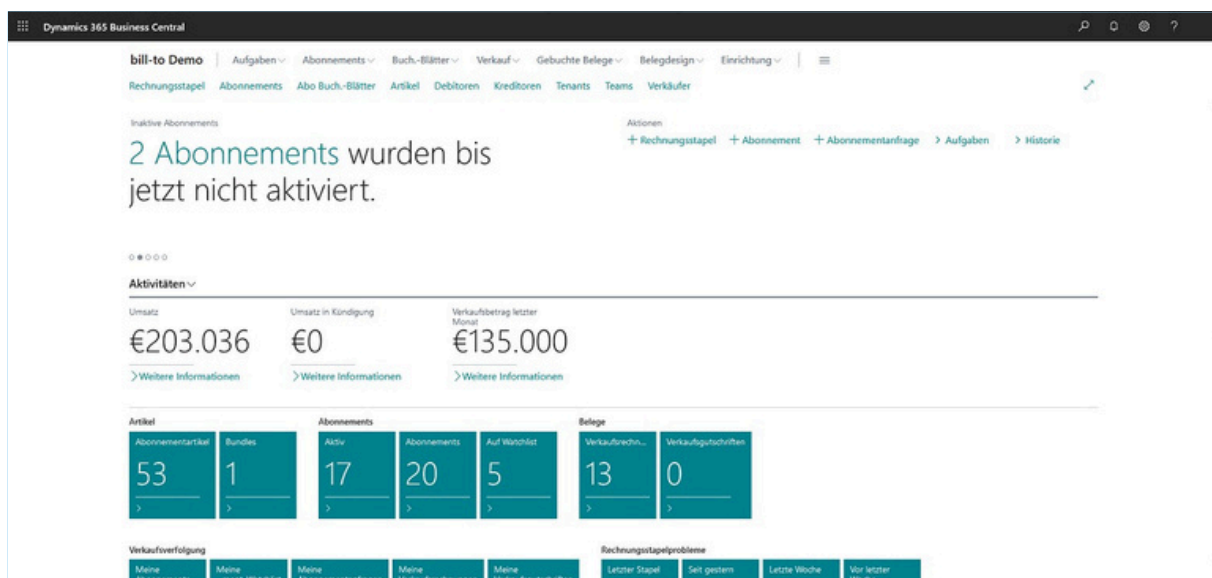
Subscription & Recurring Billing

The bill-to module specialises in creating invoices, especially in the area of subscriptions and other forms of recurring billing.

A variety of billing methods are available to you, which you can easily customise and extend. Of course, the New Commerce Experience from Microsoft is also included. But bill-to can do much more. Whether you need to bill consumption, licences or one-off items. Whether projects, sprints, software or magazine subscriptions. Whether water, electricity, telephone, storage space or CPU load. bill-to bills for you.

bill-to was created in light of the fact that subscription models are becoming the method of choice in more and more parts of the business world. For customer loyalty - and to generate a continuously growing, sustainable revenue stream. This is by no means only the case in the area of software licences, although the shift from on-premise to cloud and from licence purchase to usage fees is highlighting the overall trend.

There are now hardly any consumer goods that cannot be purchased by subscription. Fruit packages from crowdfunding, a monthly wine selection with online tasting, laundry and toiletries. Magazines are available in a double pack: the app can be added to the print edition in a bundle. Even the daily workout becomes a lifestyle product with which you can balance your work-life balance with a subscription.



Role center

bill-to 365 offers the following functions and answers to your questions:

- Flexible and easy-to-use management of your subscriptions and recurring invoices
- Different billing models, such as licences and consumption, which can be combined in the same subscription
- Simple and individual parameterisation of your invoice texts
- Integration of automated texts, also based on conditions such as public holidays
- Overview and suggestions for action through concrete facts and figures and over 25 additional KPIs
- Parallel consideration of terms, billing periods and service periods
- Trial periods, notice periods, grace periods and automatic renewals
- Bundles, one-off items and internal comments in the subscription that are not visible to your customers
- Subscription requests for parallel communication with your customers and distributors or licence and licence holders
- Subscription requests for parallel communication with your customers and distributors or licensors and to take your internal compliance rules into account
- Automatic creation of recurring invoices including error tracking
- Ad hoc usage analyses that show you which customers purchase which services from you
- Daily storage of all billing-relevant quantity changes with greatly simplified recording: manually, via book sheets, enquiries or directly via purchases

The screenshot shows the Dynamics 365 Business Central interface for a subscription. The main title is 'SB100023 - Managed Services + Lizenzen'. Below the title, there are several tabs: 'Prozess', 'Abonnement', 'Preis & Rabatte', 'Dokumente', 'Fakten', and 'Historie'. The 'Allgemein' section contains various fields for subscription details, including 'Nr.', 'Beschreibung', 'Verk. an Stelle', 'I-Stat', 'Debitorenid', 'Verkauferscode', 'Debitorenabonnementsgruppe', 'Abonnementartgruppe', 'Abonnement Startdatum', 'Status', 'Externe Belegnummer', 'Auf Wählzeit', 'Wählzeit-Untercode', 'Aktuelle Abrechnungsperiode', 'Startdatum', 'Enddatum', 'Regulärer Datum der nächsten Rechnung', and 'Nächstes Rechnungsdatum'. Below this, there is a table with columns for 'Art', 'Menge', 'Einrichtungen', 'Funktions', 'Kalkulationsmethode', and 'Weniger Optionen'. The table lists various items such as 'DataCenter', 'Windows Server OS', 'Hetzcloud RZ Monatspauschale', 'Microsoft Security Solutions', and 'LIZENZEN'.

Art	Menge	Einrichtungen	Funktions	Kalkulationsmethode	Weniger Optionen
Gruppenübersicht	1				
Bundesstaat	1076	DataCenter			
Abonnementartikel	1024	Windows Server OS			
Abonnementartikel	1070	Hetzcloud RZ Monatspauschale			
Abonnementartikel	1048	Microsoft Security Solutions Central Mobile ADV 100-409			
Gruppenname					
Artikel	1048	Bereitstellung Microsoft DataCenter			
Gruppenübersicht					
Abonnementartikel	1001	Dynamics 365 Business Central Essential User			
Abonnementartikel	1000	Office 365 E3			
Abonnementartikel	1062	CRS365 Monatl Kosten & Leistungsrechnung			
Abonnementartikel	1073	bill-to Subscription & Recurring Billing			
Gruppenname					

Subscription

Subscriptions and recurring billing. bill-to 365 gets on board.

You may be satisfied with writing orders and invoices manually if each transaction is individual. But in many business sectors, subscriptions and recurring invoices are now the norm. This means that, in principle, the same invoice must be issued again and again at fixed billing intervals over the term of the subscription. With minor or major deviations in the quantity of its components.

This is exactly what bill-to 365 specialises in. The subscription is inserted between the master data and the documents to be created from it. You can initially think of a subscription as a kind of template. The subscription defines what is billed to a customer and at what interval. You can influence the appearance of the invoice resulting from the subscription to a large extent with just a few simple steps. But we didn't want to go into the details just yet. Subscriptions are therefore a middle ground between master data and transaction data.

One step further. If your processes require it.

Subscriptions alone are the decisive factor in automating your processes and making your business transparent. But perhaps your internal processes are a little more complex. This is where subscription requests come into play. From a purely technical point of view, you don't need subscription requests - you can do without them without any problems. But if you need them in terms of content, you won't want to do without them.

Subscription requests are a step before a subscription is created. They are practically the electronic handout on which you record certain customer requests. There may be preparatory work or need clarification before a subscription is taken out.

Use subscription requests to process your customer requirements in distributed teams.

Order licences directly from your distributors from the request and track the development of delivery dates. Fulfil your compliance regulations by ensuring that an order can only be confirmed by authorised employees.

Once a subscription request has been confirmed, you can create a new subscription or update an existing one.

update an existing one. Of course, you can also create purchase orders with your distributors or your distributors or licensors can be created in the same step.

It's the masses that make the difference.

Of course, you can create your invoices from each subscription individually at the touch of a button. But that's not the point. We hope that you have many subscriptions. Hundreds, thousands. You can't maintain them manually. That's why we have intelligent invoice batches.

An invoice batch knows which subscriptions are due for billing and when, and creates all invoices accordingly. If there is a problem with an invoice, for example because the customer is blocked, this is logged in plain text and the process continues. The invoices that could not be generated can be viewed later with the detailed error messages.

The screenshot displays the Dynamics 365 Business Central interface for a 'bill-to Demo' environment. The main area shows a list of subscriptions with columns for No., Beschreibung, Status, Erstellt am, Letzte Änderung, Abonnement Startdatum, Abnahme, Abrechn., Nächstes Rechnungsdatum, Gewünschtes Kündigungsdatum, Verk. an Name, and Verk. an Deb. Nr. The list includes various subscription types like 'Office 365 E3', 'Finance Paket - New Trade', 'MS Lizenzen - Amago', 'Smart Server - Klart', 'Office 365 E3', 'MS Essential', 'Yellow Lizenz - scentme', 'Finance Produkte - New Trade', 'Managed Service - scentme', 'Finance Paket - Green Stage', 'Finance Paket - Amago', 'Finance Paket - Neue Energie', 'Finance Paket - scentme', 'Managed Service - Klart', 'Yellow Lizenzen', 'Yellow Lizenzen - New Trade', 'Yellow Lizenzen', 'Managed Services', 'MS Lizenzen', and 'MS Lizenzen'. A right-hand sidebar shows 'Details' for the selected subscription, including 'Belege' (1 Rechnung, 3 Rechnungen, 0 Buchungen, 0 Sub. Buchungen) and 'Verkaufstatistiken' (Umsatz: 1.577,42, Bruttogewinn: 1.577,42, Saldo (Mitt): 1.877,13, etc.).

No.	Beschreibung	Status	Erstellt am	Letzte Änderung	Abonnement Startdatum	Abnahme	Abrechn.	Nächstes Rechnungsdatum	Gewünschtes Kündigungsdatum	Verk. an Name	Verk. an Deb. Nr.
58100002	Office 365 E3	Testversion	17.08.2022 06:07	18.08.2022 17:43	01.07.2022	1	TM	06.10.2022		Neue Energie GmbH	D00020
58100001	Finance Paket - New Trade	Aktiv	17.08.2022 06:22	18.08.2022 14:31	01.08.2022	1	TM	06.10.2022		New Trade GmbH	D00030
58100002	MS Lizenzen - Amago	Aktiv	17.08.2022 06:29	18.08.2022 14:29	01.01.2021	1	TM	31.01.2021		Amago Bauforschung GmbH	D00010
58100003	Smart Server - Klart	Aktiv	17.08.2022 06:36	18.08.2022 14:31	01.07.2022	1	TM	06.10.2022		Anton Klart GmbH & Co. KG	D00060
58100004	Office 365 E3	Aktiv	17.08.2022 08:16	18.08.2022 14:31	01.07.2022	1	TM	06.10.2022		Green Stage GmbH	D00040
58100005	MS Essential	Aktiv	17.08.2022 08:19	18.08.2022 17:25	01.08.2022	1	TM	06.09.2022		Green Stage GmbH	D00040
58100006	Yellow Lizenz - scentme	Aktiv	17.08.2022 08:43	18.08.2022 14:31	01.08.2022	1	TM	06.10.2022		scentme GmbH	D00071
58100007	Finance Produkte - New Trade	Aktiv	17.08.2022 11:25	18.08.2022 14:31	01.08.2022	1	TM	06.10.2022		New Trade GmbH	D00030
58100008	Managed Service - scentme	Aktiv	17.08.2022 11:32	18.08.2022 14:29	01.05.2022	1	TM	06.08.2022		scentme GmbH	D00071
58100009	Finance Paket - Green Stage	Beendet	17.08.2022 11:36	18.08.2022 13:58	01.01.2021	1	TM	31.08.2022	31.12.2021	Green Stage GmbH	D00040
58100010	Finance Paket - Amago	Aktiv	17.08.2022 20:34	18.08.2022 14:29	01.10.2021	1	U	06.11.2021		Amago Bauforschung GmbH	D00010
58100011	Finance Paket - Neue Energie	Aktiv	18.08.2022 13:23	18.08.2022 17:43	01.01.2022	1	TM	06.04.2022		Neue Energie GmbH	D00050
58100012	Finance Paket - scentme	Aktiv	18.08.2022 13:30	18.08.2022 14:29	01.05.2022	1	TM	06.08.2022		scentme GmbH	D00071
58100013	Managed Service - Klart	ErstMR	18.08.2022 13:59	18.08.2022 14:00	01.09.2022	1	TM	06.10.2022		Anton Klart GmbH & Co. KG	D00060
58100014	Yellow Lizenzen	Aktiv	18.08.2022 14:00	18.08.2022 17:43	01.08.2022	1	TM	06.09.2022		scentme GmbH	D00071
58100015	Yellow Lizenzen - New Trade	Aktiv	18.08.2022 14:20	18.08.2022 14:34	01.07.2022	1	TM	06.09.2022		New Trade GmbH	D00030
58100016	Yellow Lizenzen	Aktiv	18.08.2022 14:35	18.08.2022 14:53	01.08.2022	1	TM	06.09.2022		Green Stage GmbH	D00040
58100017	Managed Services	Aktiv	18.08.2022 15:54	18.08.2022 17:44	01.08.2022	1	TM	06.09.2022		Neue Energie GmbH	D00050
58100018	MS Lizenzen	Aktiv	18.08.2022 17:26	18.08.2022 17:20	01.06.2022	1	TM	06.07.2022		Green Stage GmbH	D00040
58100019	MS Lizenzen	Aktiv	18.08.2022 17:39	18.08.2022 17:40	01.08.2022	1	TM	06.09.2022		Amago Bauforschung GmbH	D00010

Subscription List

What happens if something changes?

Subscriptions offer a fixed frame of reference for creating invoices over their term, but they are not rigid. Things change from time to time. Quantities are increased, individual licences are cancelled. In the case of subscription lines that work on a consumption basis, quite a lot even changes every month.

All of this is meticulously logged and ultimately recorded in the form of items. Over the entire term of a subscription, you always know how the subscribed quantities of each individual subscription line have changed and when. If you allow changes at all.

So how do these quantity changes get into the subscription so that they affect the monthly bill? There are four very convenient ways to do this, which can also be used in combination.

Firstly, you can change quantities in the subscription manually. This means that it looks manual, but proper booking processes are running in the background. Then there is a complete subscription book sheet logic. You can enter quantity changes in your own subscription ledger sheets in the same way as standard ledger sheets and then post them to the subscriptions. The book sheets can also be written manually. But the idea behind this is, of course, that you import external data and add it to the correct subscription using this logic.

We have already seen that subscriptions can be updated via subscription requests. Finally, subscription quantities can also be changed directly - or indirectly - via purchase orders. What all four of these options have in common is that they use exactly the same logic in the background: A book sheet is filled with data that comes from different sources. This book sheet generates component items, which ultimately become component items during billing. This ensures that all logics are treated equally. The user is simply not bothered with these internal processes.





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Für weitere Informationen zu bill-to 365 wenden Sie sich an uns oder Ihren Microsoft Dynamics 365 Business Central Partner. Unsere Partner beraten und unterstützen Sie gerne bei der Implementierung und dem Einsatz von bill-to 365.