

Membership & Subscription Management Power App for Dynamics 365 Business Central



Managing basic memberships and subscriptions often occurs outside a company's ERP system, heavily depending on external databases that offer limited reporting features. This results in a cumbersome process of storing and managing documents and communications related to memberships, subscriptions, and their renewals, making it nearly impossible to ensure complete visibility for all organisational stakeholders.

Additionally, the billing for memberships and subscriptions usually operates as a distinct, fragmented activity. This necessitates the redundant input of information across various organisational departments to issue an invoice to a "customer."

There's also the consideration of financial document treatment. Different billing scenarios demand unique financial handling, such as the deferral of revenue for future billing cycles. In many cases, this either involves expensive add-ons or manual processes within the ERP system or through complex spreadsheets maintained by financial accountants.

This is the rationale behind the development of our Membership & Subscription Management Power App for Dynamics 365 Business Central. It offers an all-in-one solution, ensuring all contract-related data is centralised, perfectly suited for companies that categorise their "Subscribers" or "Members" as Customers in Business Central.

What's Included:

The Membership & Subscription Management solution for Dynamics 365 Business Central, built on a Power App and featuring Power BI for analytics, streamlines the membership and subscription processes:

- Manages the full lifecycle, from renewals to invoicing.
- Links all key documents to a "contract" for streamlined access and review.
- Offers detailed audits of renewals, invoices, and credit notes.
- Integrates with "Items" in Business Central to maintain default settings.
- Allows contract number creation for profitability analysis.
- Updates deferral schedules automatically based on item-specific templates.
- Cloud-based and accessible from any device with internet connectivity.
- Developed on the Microsoft Power Platform for efficiency and integration.
- Avoids data duplication and integrates seamlessly with Business Central.
- Provides comprehensive reporting via Power BI, encompassing both past and forecasted billing.
- Ensures document numbers are synchronised for thorough process oversight.

Membership & Subscription Management Power App

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Key Features & Benefits



- User-friendly interface for easy navigation.
- Users with access to multiple companies can stay logged in, accessing all necessary information in one centralised location.
- Eliminates the need for manual processes in membership and subscription renewals and information filing, as everything is stored in the App linked to a specific contract.
- Maintains a comprehensive transaction history for each contract.
- Automatically generates contract number dimension values in Business Central if needed, simplifying the process.
- Power BI generates detailed reports on renewal statuses, past billing activities, and future billing forecasts, aiding financial planning and analysis.
- Enables processing and reporting of credit notes directly associated with contracts.
- Allows for the complete management of memberships/subscriptions within the App, meaning no Business Central licence is required for admin roles, reserving it mainly for the finance team.

The implementation of our Membership & Subscription Management Power App typically takes 4-5 days per environment/localisation for a standard setup, including necessary training. Note that Power App licences are needed.

Enhanced reporting

Comprehensive Power BI analytics available without needing access to Business Central or the App.



Fully integrated

A single point of data input from the initial contract entry to the final invoice generation.

Streamlined operations

For example, future billing invoices are automatically adjusted with line-level deferral schedules to ensure precise revenue allocation.



Additional Key Advantages:

No duplication of entry

Billing is via an integration directly into Business Central against the customer.

Easily accessible

Can be accessed from any device including mobile.

Live links

Get live links into Business Central so new customers, items and dimensions are picked up on the same day.

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