

Recurring Contract & Billing Management for Dynamics 365 Business Central



When addressing the essentials of contract management, organisations often find these tasks are executed outside their ERP systems, relying heavily on external databases that offer limited reporting functionalities. This leads to a highly manual process for storing documents and tracking interactions related to contract management and renewals, making it exceedingly difficult to provide comprehensive visibility to all internal stakeholders.

Moreover, the billing of contracts typically operates as an entirely distinct and fragmented process, meaning data entry is duplicated across various organisational functions just to issue an invoice to a customer.

Additionally, the financial handling of documents must be taken into account. Varying billing profiles demand different financial treatments, such as revenue deferral in upcoming billing cycles. For many organisations, this is either an expensive endeavour involving additional modules or a manual process executed within the ERP system or through intricate spreadsheets maintained by financial accountants.

This prompted the development of our Recurring Contract & Billing Management App for Dynamics 365 Business Central—a seamlessly integrated solution that centralises all contract-related information within your organisation.

What's Included:

The Recurring Contract & Billing Management solution for Dynamics 365 Business Central, built on a Power App and featuring Power BI for analytics, streamlines the recurring contract and billing processes:

- Manages the full Contract lifecycle, from renewals to invoicing.
- Stores all documents against a contract for review.
- Offers detailed audits of renewals, invoices, and credit notes.
- Integrates with "Items" in Business Central defaulting at customer or dimension level.
- Allows contract number creation as a dimension for contract profitability.
- Updates deferral schedules automatically based on item-specific deferral 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.
- Writes back document reference numbers from Business Central into the App to allow for end-to-end reporting

Recurring Contract & Billing 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 contract 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 Contract Admin within the App, meaning no Business Central licence is required for admin roles, reserving it mainly for the finance team.

The implementation of our Recurring Contract & Billing Management Power App typically takes 4-5 days per environment/localisation for a standard setup, including a half day training session. 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 accurate revenue distribution.



Additional Key Advantages:

No duplication of entry

Contract 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.

Contact us



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