

Advanced Subscription Management for Dynamics 365 Finance.

Modern billing models introduce complexity that standard D365 Finance processes weren't built to handle. ASM extends D365 Finance to close these gaps, enabling advanced billing and compliance without the need for customizations.

ASM gives finance teams cleaner amendments, stronger revenue control, and scalable billing for complex operations.



Subscription control.

Amend live subscriptions, process backdated changes, split or re-bill invoices, and keep clean invoice sequencing.



Revenue recognition and compliance.

Support complex recognition, multi-entity allocation, and risk-based adjustments beyond straight-line ERP logic.



Rule-based & public sector billing.

Manage utilities, taxes, permits, penalties, and other pricing models driven by rules instead of static contracts.



Dynamics 365 Sales integration.

Convert approved CE quotes and amendments into governed billing schedules inside D365 Finance.



Customer Portal.

Give customers invoice visibility, payments, refunds, and controlled self-service from a connected experience.



Fully embedded in D365 Finance.

Extend Microsoft's Subscription Billing foundation without pushing billing and revenue data into disconnected systems.

Turn billing breakpoints into control, compliance, and scale.

ASM is the advanced subscription management layer for D365 Finance that solves the places standard ERP billing breaks : contracts that change after invoicing, revenue recognition that doesn't follow simple rules, and billing models driven by regulation, usage, or assessments.

Three packaged solutions for D365 Finance challenges.



Subscription control.

When contracts change after invoicing, ASM lets teams amend live subscription, process backdated updates, and avoid schedule rebuilds and credit/re-bill chaos.



Revenue recognition & compliance.

When recognition, allocations, or audit requirements become more complex, ASM supports finance with compliant logic and cleaner reporting controls.



Rule-based & public sector billing.

When process comes from statutes, rates, usage, or assessments, ASM adds the billing logic and transparency standard ERP lacks.

What changes with ASM.



Close faster.

Automated amendments, cleaner invoice sequencing, and fewer manual corrections.



Improve auditor confidence.

Traceable changes, stronger controls, and compliance-grade revenue logic.



Scale without workarounds.

Support high-volume and rule-based billing inside your finance ecosystem.



Connect the full lifecycle.

Add CE and the portal when quoting, payments, or self-service need to stay aligned.

Discovery & Solution-Fit Assessment.

This session helps you understand where you stand in your subscription billing and revenue journey, and provides a clear, actionable path to modernize and scale within Dynamics 365 Finance.

How it works.

- 4-5 hours total.
- 1-2 page Solution Fit Report.
- Clear next-step recommendations.

Workshop 1:

Discovery & integration assessment.

We explore your revenue streams, pricing models, billing cycles, and contract lifecycle. We also identify your manual vs. automated workflows, and your current-state quote-to-cash processes.

Workshop 2:

Value & strategy session.

We explore ROI drivers, billing and revenue recognition blockers, integration landscape, opportunities for optimization, and leave you with recommendations for next steps.

Assessment outcomes.

- **A structured view** of your quote-to-cash model, highlighting where billing complexity is growing.
- **Clear visibility** into key inefficiencies, operational bottlenecks, and areas of revenue leakage and compliance risk.
- **Mapping of your requirements** to Dynamics 365 Finance and ASM, including integration and scalability concerns.
- **A clear, actionable path** forward with recommendations, scoring, and next steps (deeper dive, demo, or implementation planning.)



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