Dynamics 365 Finance: Subscription Billing Fundamentals

Duration: 2 Days (Remote) | **Focus Area:** Business/IT Alignment | **Difficulty level:**   200

Intended Audience

This course is geared toward individuals responsible for overseeing the day-to-day business processes related to subscription and recurring billing within their organization's Accounts receivable work stream(s).

Primary Audience: Pricing, Contract management and Accounts receivable leads
Secondary Finance and Business analyst leads

Overview

The Microsoft Dynamics 365 Finance: Subscription Billing Fundamentals Chalk Talk is a two-day engagement delivered remotely by a Dynamics 365 Finance expert. This course is geared toward individuals responsible for overseeing the day-to-day business processes related to subscription and recurring billing within their organization's Accounts receivable work stream(s).

Objectives and Key takeaways

Individuals who attend this course will retain a working knowledge of the subscription and recurring billing functionality available in Dynamics 365 Finance by reviewing the following concepts:

• Recuring contract billing
• Revenue and expense deferrals
• Multi-element revenue allocation

Agenda

Day 1
• **Module 1: Introduction to subscription billing**
• **Module 2: Billing schedules**
• **Module 3: Working with billing schedules**
• **Module 4: Pricing**
• **Module 5: Item types**

Day 2
• **Module 6: Managing billing schedules**
• **Module 7: Revenue and expense deferrals setup**
• **Module 8: Working with deferrals**
• **Module 9: Multi-element revenue allocation (MERA)**
• **Module 10: Unbilled revenue**

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Course details

Module 1: Introduction to subscription billing
- Recurring contract billing
- Revenue and expense deferrals
- Multiple element revenue allocation

Module 2: Billing schedules
- Setup recurring contract billing
- Create billing schedules
- Invoicing
- Copy billing schedule

Module 3: Working with billing schedules
- Creating billing schedules
- Using templates

Module 4: Pricing
- Flat
- Standard
- Tier, flat tier

Module 5: Item types
- Standard item type
- Usage (Consumption, Reading)
- Milestone billing

Module 6: Managing billing schedules
- Manage terminations, credits
- Manage holds
- Adding support contracts

Module 7: Revenue and expense deferrals setup
- Revenue and expense deferral setup
- Deferral posting method
- Deferral templates
- Deferral default transactions

Module 8: Working with deferrals
- Billing schedules and deferrals
- Deferrals with service items vs tangible items
- Sales orders and deferrals
- Free text invoice, ledger journals
- Purchase order expense deferrals

Module 9: Multi-element revenue allocation (MERA)
- MERA overview
- Item standalone selling price
- MEA templates

Module 10: Unbilled revenue
- Setup unbilled revenue
- Process example unbilled revenue
- Milestone billing and unbilled revenue

Pre-requisites

General knowledge of the Accounts receivable and/or the Sales order processing processes is recommended but not required.

For more information

Contact your Microsoft Account Representative for further details.

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