



**Dynamics 365**

**Business Central**

How to Guide: Billing and  
Subscription Management



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# 1 Introduction

Welcome to Microsoft Dynamics 365 Business Central!

We have expanded the D365 Business Central Sales & Marketing functionality to cater to annuity income businesses – to help you keep track of your subscriptions and associated billing.

Billing & Subscription Management allows you to manage your subscription Products & Services.

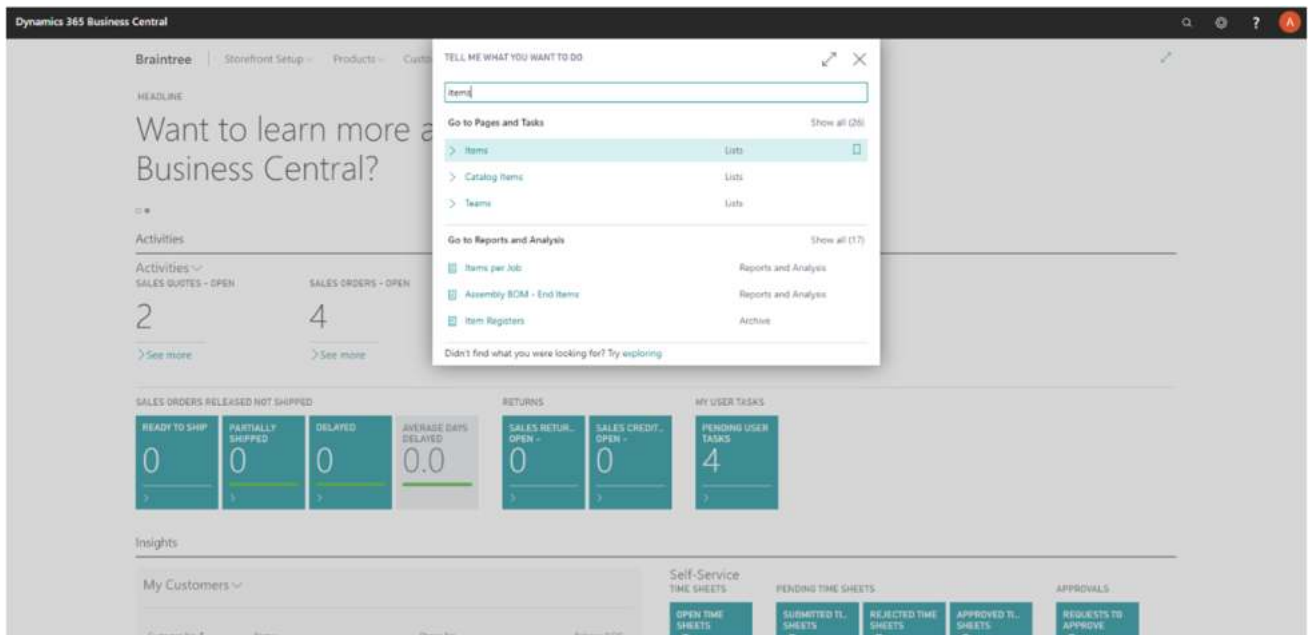
The following document outlines how to set up Billing and Subscription Management.

# 2 Dependencies

Braintree Subscription Management extension app for Microsoft Dynamics 365 Business Central.

# 3 Create your Subscription Products & Services

- **Search “Items”:**



- **Select an existing Item or create a new card to represent your subscription product or service:**

Dynamics 365 Business Central

ITEM CARD | WORK DATE: 1/28/2022

BC-APP-00000 · B-BBEE Scorecard Premium

Process Item History Special Sales-es & Discounts Request Approval Actions Navigate Fewer options

**Item** Show more

No. BC-APP-00000 Type Non-Inventory

Description B-BBEE Scorecard Premium Base Unit of Measure PCS

Blocked  Item Category Code BC-APP\_SBTR

**Subscription**

Subscription Name B-BBEE Scorecard Premium Unit Price 50.00

Subscription ID T35d80f-4133-4f1a-s19f-cl7da7aa36d0 Unit List Price 100.00

URL https://google.com/... Currency Code ZAR

Description 2 Category BC App Subscription

\* Costs & Posting > 0.00

Prices & Sales > 50.00

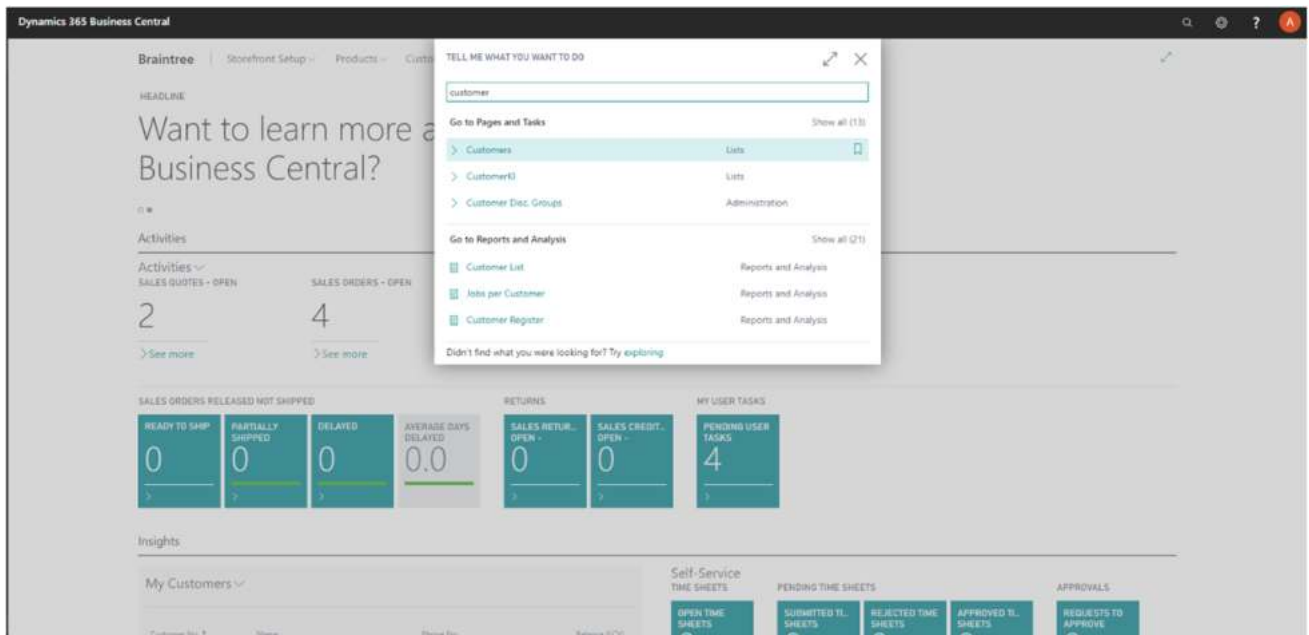
Replenishment > Purchase

Planning > None

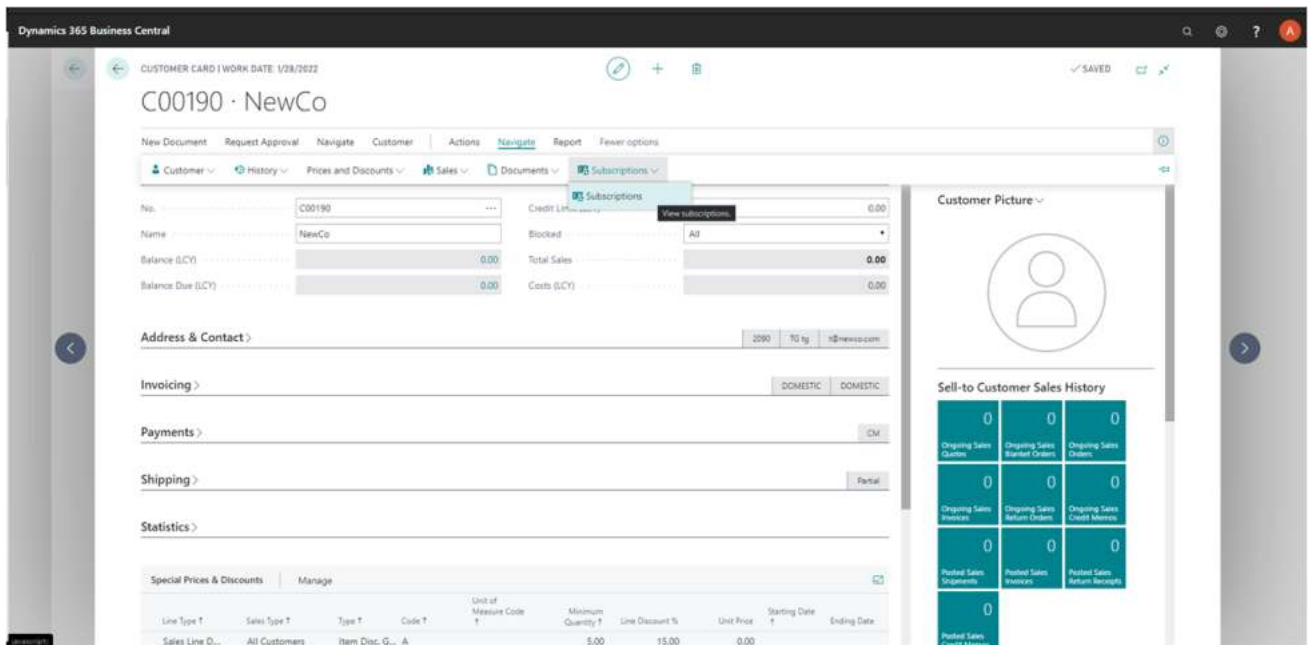
- **Specify the following information as a minimum to enable a subscription**
  - **No.**
  - **Description**
  - **Type: Non-Inventory**
  - **Blocked: No**
  - **Subscription Name**
  - **Subscription ID**
  - **URL INFORMATION LINK**
  - **Description 2**
  - **Unit Price APPLICABLE TO BILLING**
  - **Unit List Price AVAILABLE ON THE BUSINESS CENTRAL SUBSCRIPTION CATALOG & API**
  - **Blocked: No**
  - **Sales Blocked: No**
  - **Item Category Code: End with “\_SBTR”**

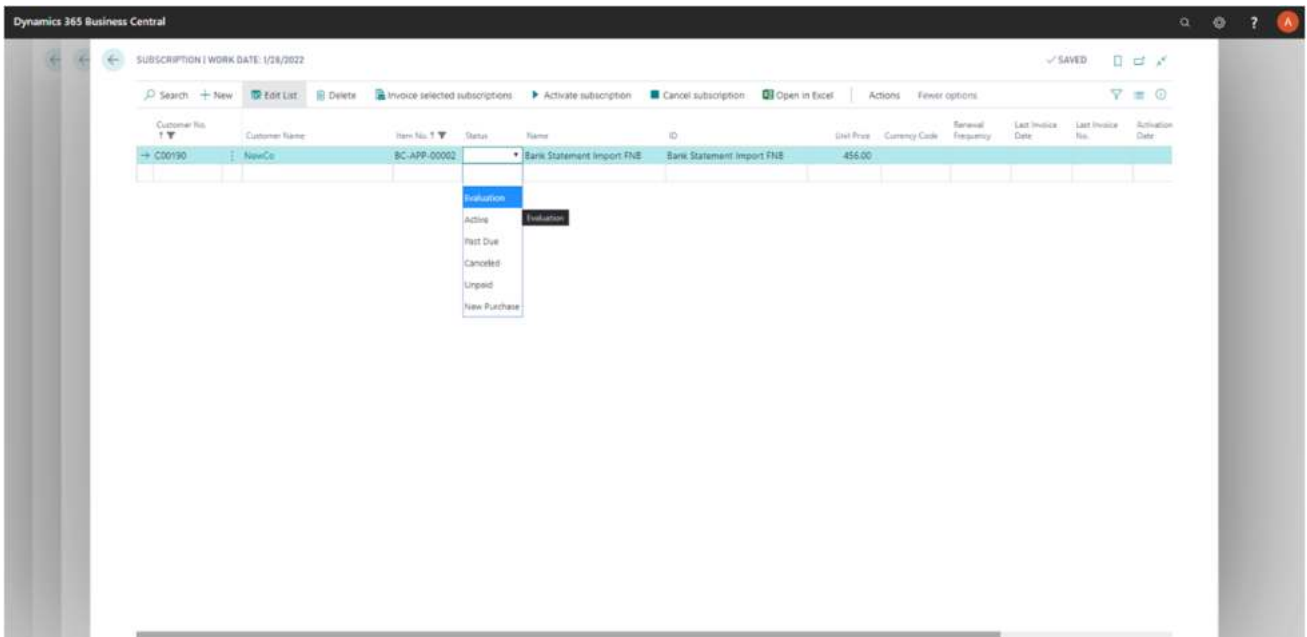
## 4 Manual Subscription Sign-up

- Search “Customer”:

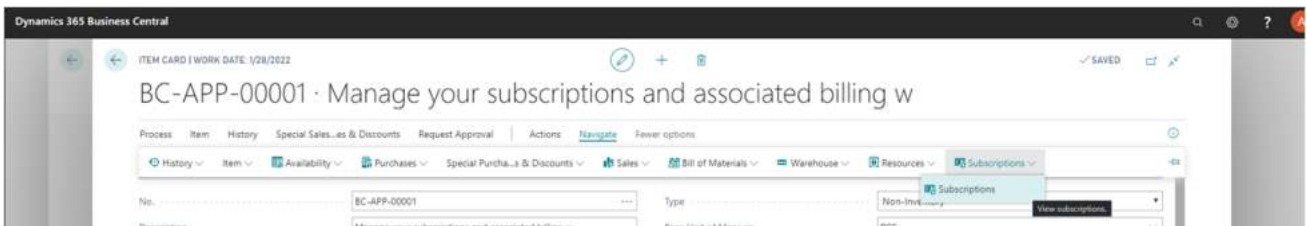


- Select an existing Customer or create a new card to represent your subscriber
- Select Navigate > Subscriptions > to view or edit the client subscriptions



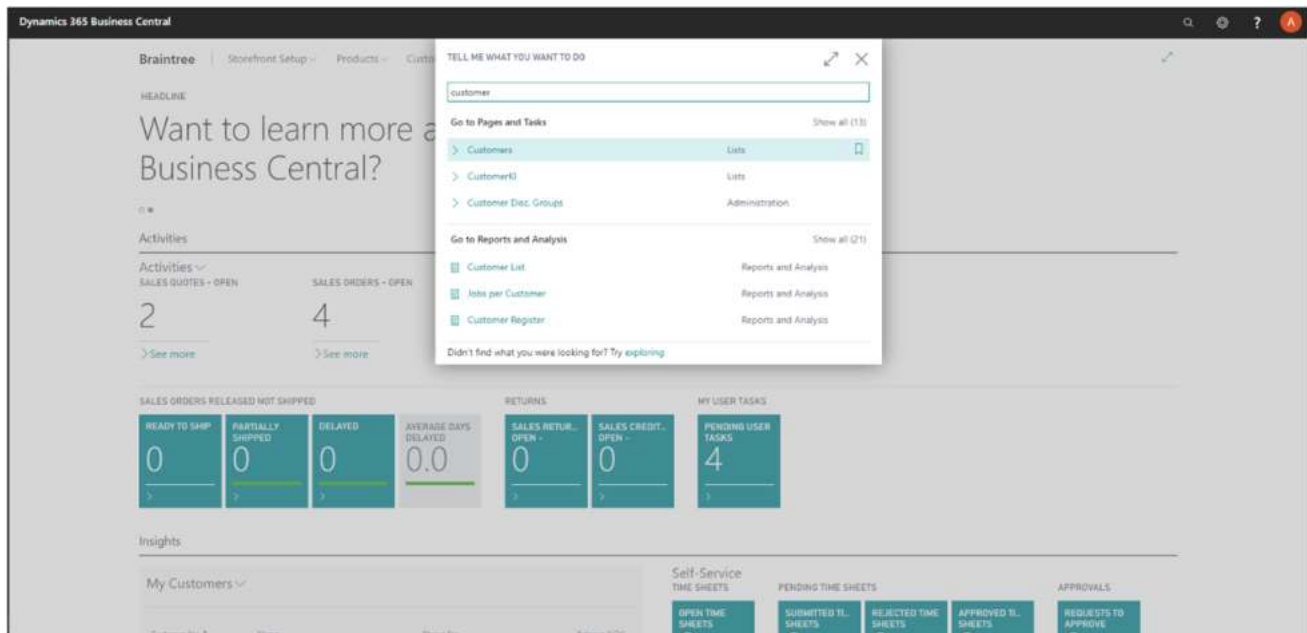


- **Specify the following information as a minimum**
  - **Item No. THE SUBSCRIPTION PRODUCT OR SERVICE**
- **Pricing and associated currency can be overridden with client specific configuration**
- **This information is also accessible from the Item Card:**

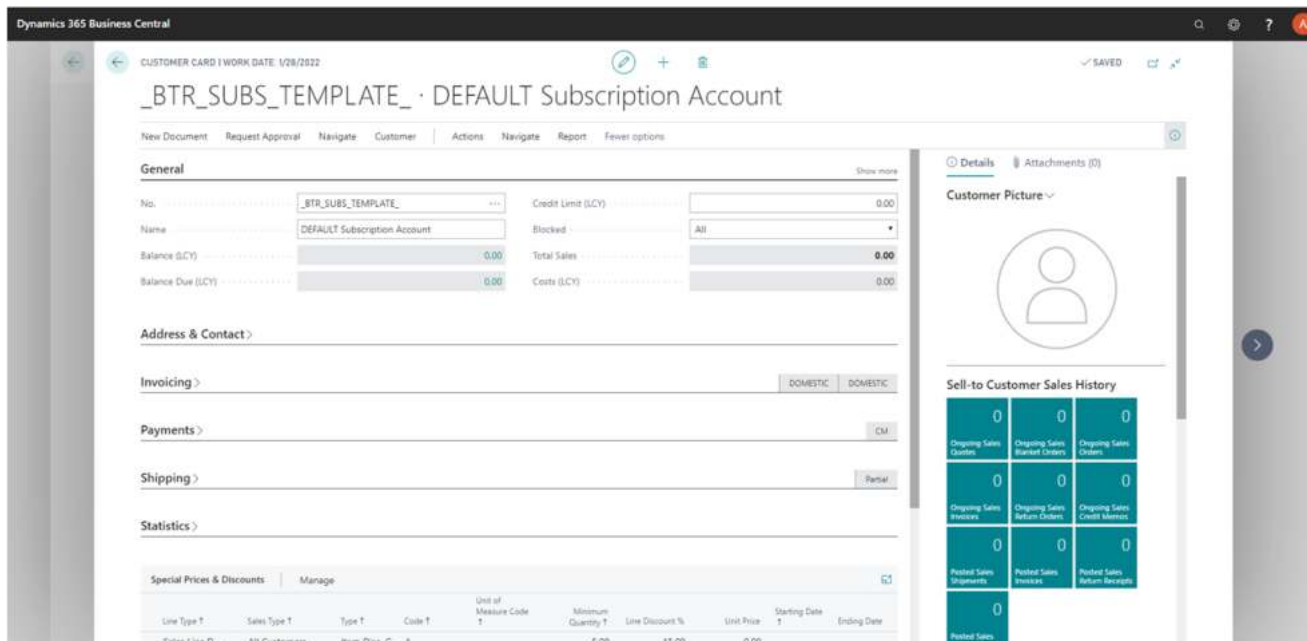


## 5 Automatic Subscription Sign-up

- Search “Customer”:



- Create a new Customer Card:
  - Set the No. to \_BTR\_SUBS\_TEMPLATE\_
  - This Customer Card will be used as a template for new account sign ups

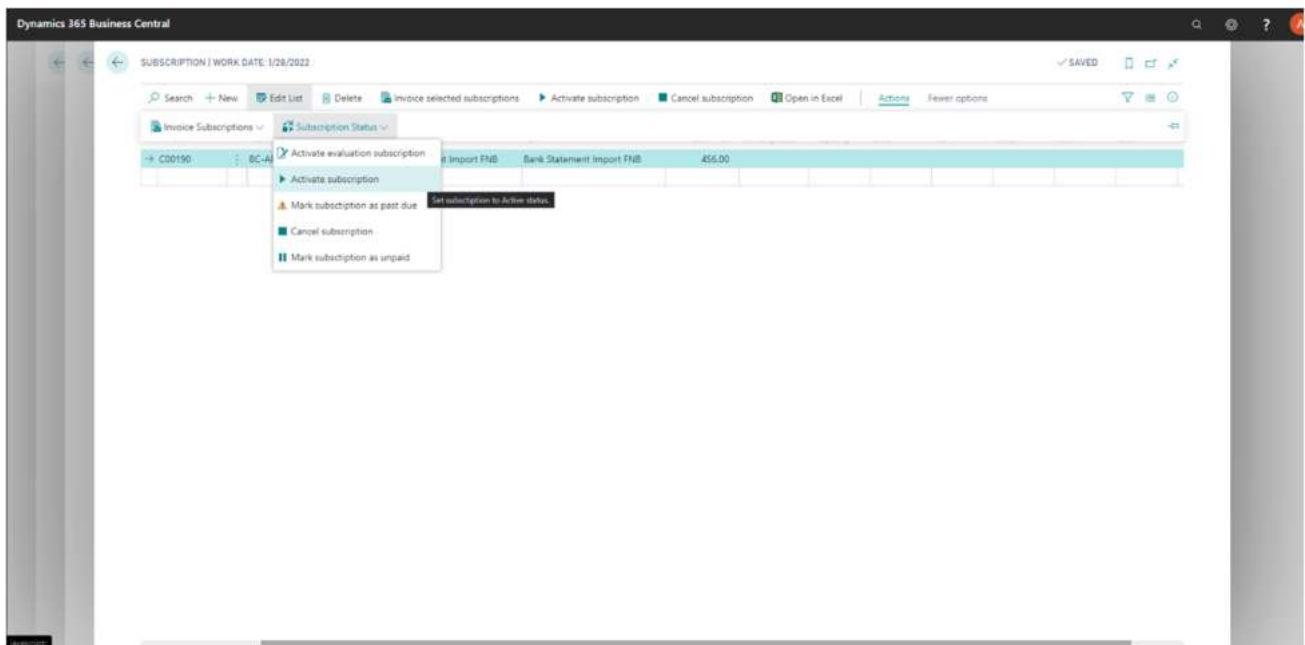


## 6 Client-Side Subscription Management

- Refer to **How-To Guide: Braintree Subscription Management**
- Refer to **API Integration Guide: Braintree Subscription Management**

## 7 Subscription Management

- **Open Subscriptions from either the Item or Customer Cards, Navigate > Subscriptions:**

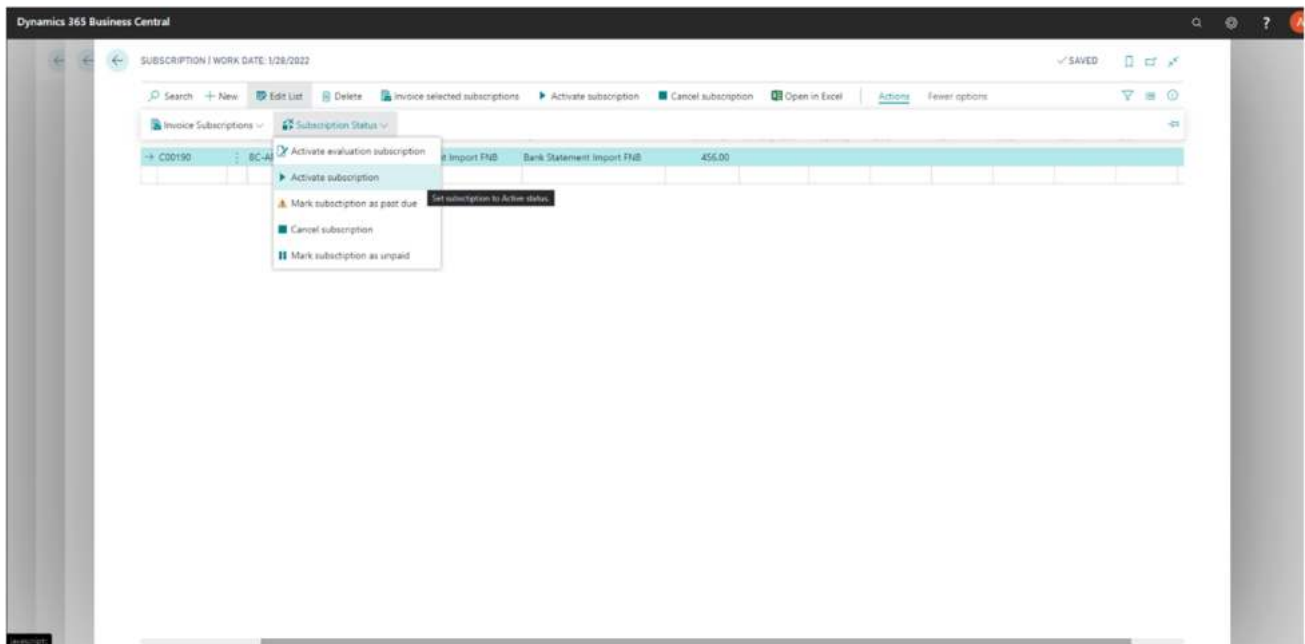


- **Select Actions > Subscription Status, to manage subscriptions for client accounts:**
  - **Activate evaluation** ENABLES SUBSCRIPTION
  - **Activate** ENABLES SUBSCRIPTION
  - **Mark as Past Due** INFORMATION STATUS
  - **Cancel** DISABLES SUBSCRIPTION
  - **Mark as Unpaid** INFORMATION STATUS

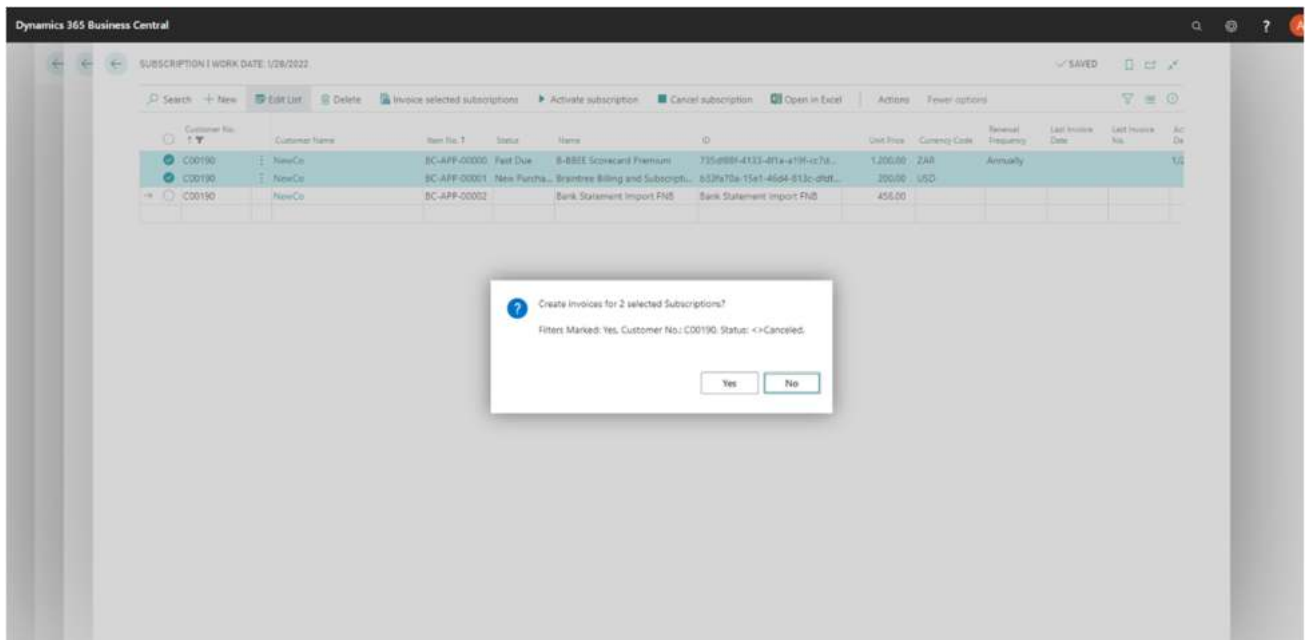


## 8 Billing Management

- **Open Subscriptions from either the Item or Customer Cards, Navigate > Subscriptions:**

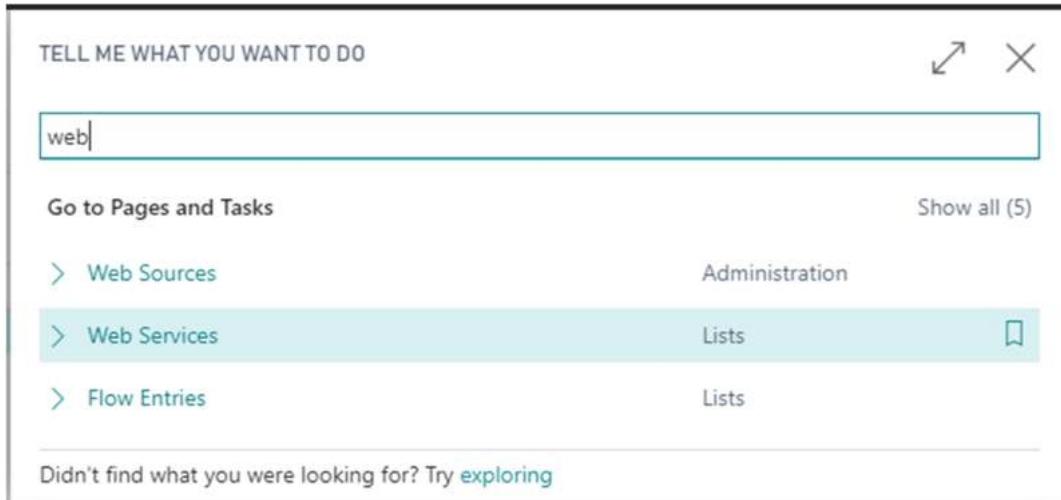


- **Filter the list and/or Select applicable lines to create Sales Invoices:**
- **Select Actions > Invoice Subscriptions**
  - **Invoice INVOICE PER CUSTOMER CARD**
  - **Split Invoice INVOICE PER ITEM (SUBSCRIPTION), PER CUSTOMER CARD**



## 9 Web Service Configuration

- Required to enable Business Central Extension App subscriptions or 3<sup>rd</sup> party API integration
- Search “Web Services”



- Configure and publish web services:
  - Page 52011644, Name: SubscriptionAccountBTR
  - Page 52011647, Name: SubscriptionCatalogBTR
  - Page 52011644, Name: SubscriptionBTR

Dynamics 365 Business Central

WEB SERVICES | WORK DATE: 1/26/2022

Search + New Edit List Delete Reload Open in Excel More options

Object Type	Object ID	Object Name	Service Name T	All	Publ...	OData v4 URL
Page	52011644	Subscription Account API	SubscriptionAccountBTR	✓	✓	http://d365bc7048/BC/odata/v4/Company('My%20Company')/SubscriptionAccountBTR
Page	52011648	Subscription	SubscriptionBTR	✓	✓	http://d365bc7048/BC/odata/v4/Company('My%20Company')/SubscriptionBTR
Page	52011647	Subscription Catalog API	SubscriptionCatalogBTR	✓	✓	http://d365bc7048/BC/odata/v4/Company('My%20Company')/SubscriptionCatalogBTR

- URLs to be configured on client Braintree Subscription Management, Subscription Setup
- Configure a user account for web service authentication
  - Search “Users”

- Select an existing User or create a new card to represent your web service authentication
- Select “Change Web Service Key” to configure a Web Service Access user account
- Refer to **How-To Guide: Braintree Subscription Management**, to test and use the configuration

**User Card**

Change Web Service Key Effective Permissions Actions Fewer options

**General** Set up the key that web services use to access your data, and then specify the key on the user card for the relevant user accounts.

User Name: ADMIN State: Enabled

Full Name: Contact Email:

**Web Service Access**

Web Service Access Key: FK2CY6R2KQ5VrdZLKD Web Service Expiry Date:

**Office 365 Authentication**

**User Groups** Manage

Code T	Name	Company Name T
→		My Company

**User Permission Sets** Manage

Permission Set T	Description	Company T	Extension Name	Permission Scope
→ SUPER	This role has all permissions.			System

## 10 Conclusion

For additional assistance, please contact us at [info@braintree.co.za](mailto:info@braintree.co.za).