



HOW MULTISOFT INNOVATIVE SOLUTIONS BECAME A REBILS USER?

REBILS CASE STUDY

MultiSoft





A HISTORICAL REVIEW

When Multisoft started to develop add-ons for Microsoft Dynamics NAV in 2010, partners could not only buy perpetual MobileNAV licenses but subscription-based licenses were introduced to the market as well.

However, at that time, subscription payment was not as popular as nowadays. Thus, we only had to handle a few monthly invoices.

STARTING TO THINK ABOUT A NEW SOLUTION...

THE REASONS BEHIND THE IMPLEMENTATION OF REBILS

In the last few years, subscription business models started to get more attention. Companies like Microsoft and MultiSoft also followed the market by rethinking traditional business models and introducing subscription licenses. That helped users with lower liquidity to buy our solutions. Due to the spread of the model, the administration team had to face a bigger and bigger workload caused by the repetitive tasks during the invoicing processes.

The change of the market and needs inspired us to follow the trends sustainably, so we started to think about a solution that makes it possible to automate repetitive processes of the administration. That makes it possible for our colleagues to focus more on important and value-creating tasks. The main reasons for the development were to avoid the possibility of human errors during the invoicing process, eliminate administrative overhead, and have consistent, clear information about the invoices every time.

First, we have tried to solve the challenge with the customization of our ERP and CRM systems. Then we realized that it is more sustainable to create a Business Central add-on that can attach to different versions of Business Central and provides a seamless and more transparent implementation for the long run. So we decided to create ReBILS. In 2020, after many development hours and testing, the extension was ready to use, so we have started our implementation.

ABOUT MULTISOFT...

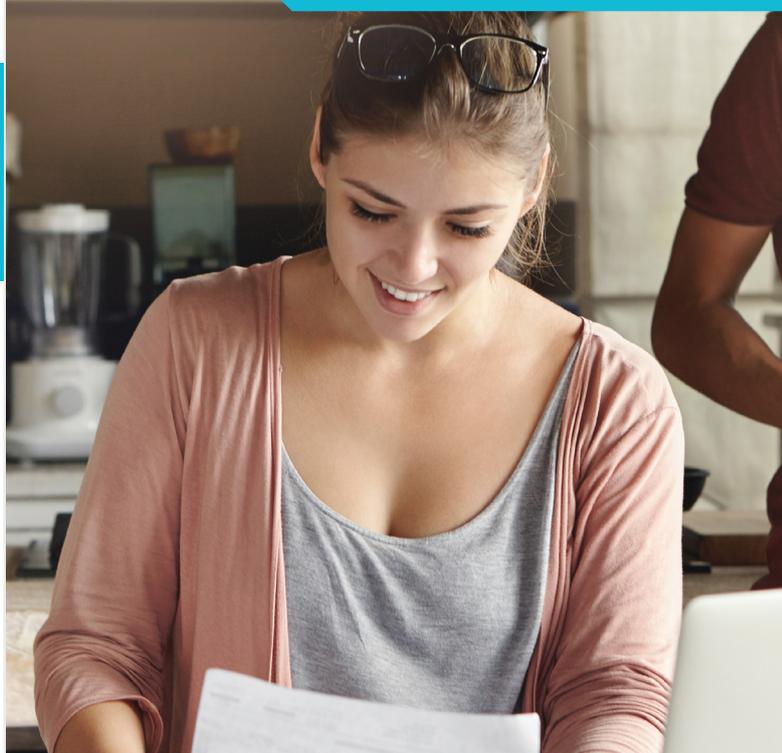
MultiSoft Ltd. has different business units. Two of them were also affected by the ReBiS implementation:

„**Innovative Solutions**” unit, which is dedicated to creating solutions for Microsoft Dynamics users worldwide and sell them through our partner network.

„**Business Solutions**” unit is responsible for ERP and CRM implementations and selling licenses for the domestic market, including the aftersales and support of those products and services.

The two units work separately and differently, so goes the administration as well. Business Solutions mostly have less but more complex subscription-based contracts with more items. However, the Innovative Solutions unit has much more recurring contracts but mostly with only a few lines of items.

There are also several kinds of invoicing rules and exceptions. Complying with those rules was a critical part of the implementation of the add-on. To make it possible, we developed ReBiS to be as versatile as possible.



INNOVATIVE SOLUTIONS UNIT'S ADMINISTRATION PROCESSES BEFORE REBILS

Earlier, we used Microsoft CRM and Excel sheets to register every information for subscription-based payments and invoicing. By the start of every year, we have manually filled in every invoicing date for every end-user so we could check the sheet to find out if there is any upcoming record date. This file should be constantly and continuously updated and maintained manually.

Every invoice should have been administrated in the CRM as well by creating a new lead and sales order for them. The database was connected to the ERP system, where we created and posted the invoices manually to our partners.

CHALLENGES OF THE IMPLEMENTATION

- Creating new invoicing processes
- Gathering and differentiating different types of contracts, registration of outstanding assets and contracts
- Simultaneous implementation of ReBiS and Business Central
- The process development affected several teams





BUSINESS SOLUTIONS UNIT ADMINISTRATION PROCESSES BEFORE REBILS

This unit used to use an older NAV version and an Excel sheet to store information regarding recurring invoices. Order requests and the related data were processed and registered by several colleagues and teams.

Unfortunately, during the multi-step manual processes, some inconsistent data appeared from time to time. It means that most of the reports could be inaccurate. A common example was the inconsistent use of the item numbers. They may have extra dashes or spaces, so some invoices weren't included in those reports when filtering by them.

After that, we replicated and modified earlier invoices to create new ones. That not only created a lot of extra work but also gave place to human errors.

CHALLENGES OF THE IMPLEMENTATION

- Creating new invoicing processes
- Collecting and differentiating the existing types of contracts
- Creating rules for contract administration
- Cleaning the database of previous orders
- Simultaneous implementation of Business Central and ReBilS

HOW DID WE FACE THOSE CHALLENGES?

The implementation period was 12 months, which included: recreating invoicing processes, cleaning the existing database, implementation of ReBilS, training of stakeholders, and testing.

For the Innovative Solutions unit, the biggest challenge was to register the contracts and outstanding assets. There was no joint database, which consistently contained the contract types and the payment rules, so we had to create a new, cleaned database for those. After that, it allowed us to easily maintain data structure and semantics to find all the needed information in much less time. The Business solutions unit's implementation process was the following:

- 1. Revision of the processes** - Revise the existing processes to fit into the framework Business Central and ReBilS can provide. The new methods are more transparent and create a more suitable environment for recurring billing tasks.
- 2. Rationalization and categorization of item codes** - We created an item catalog in Excel, which is easy to maintain in the future. This contains all the previously used item number variants to be updated in the ERP system.
- 3. Migration of data to Business Central** We migrated historical payment data and contracts into ReBilS.
- 4. Training and testing** - At the end of the implementation, every stakeholder participated in a comprehensive training about ReBilS and its functionality. After that, they had the chance to use that knowledge to test the system in a sandbox environment filled with live data.



WHAT BENEFITS DO WE SEE AFTER THE IMPLEMENTATION?

- Clear user interface, transparent and accurate statistics, due to the elimination of the multi-step processes and live data processing
- More effective administration
- Automatic invoicing processes
- Customizable solution: ReBiS can provide a good solution for both of our units
- Elimination of possible human errors during the invoicing processes

WHAT SHOULD YOU LEARN FROM OUR CASE?

- Dedicate a project manager who will be able to keep the implementation under control from the planning phase until the new system goes live
- To go live, choose a date where all the stakeholders are available, and there is no other extensive project finishing, which would not let the stakeholders focus.
- Allocate an adequate amount of resources (time and people) to the project.
- Reveal and revise contract types and invoicing methods you use for different partners or segments so that you can plan your new processes accordingly.
- Create your own rules for the administration of invoices (if you don't have those already) to create a transparent and sustainable structure of your data in ReBiS.
- If you have a clean, maintained database, you can use an uploader to migrate your data in ReBiS.
- Leave enough time to get used to the new system. It will be beneficial in the long term. Be patient and supportive! Implementing a new system always takes time and effort. But after a short period, you will see that it is worth working for.

„Implementation of ReBiS eliminated the human errors while making our processes more efficient and flawless. It saved us plenty of time...”



Szilvia Kincses
Lead of Sales Administration

Our company offers a complete solution in corporate governance, customer relationship management, and custom software development. In addition to our market-leading position in Hungary, we have international channels across five continents.

Our nearly thirty years of experience, the continuous monitoring of the development of technology, and the continuous training of our specialists guarantee that we can always serve our customers at the highest level, thus providing them with the opportunity for constant development. The success of our work is proven by the recognition of multinational companies, long-term partnerships, and hundreds of satisfied customers.

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