



Agentic AI at Work Inside Business Central

Unlocking Scalable Recurring Revenue
Beyond Out-of-the-Box Limits



Executive Summary

Recurring revenue has become the dominant growth model for SMBs—but operating it at scale remains a challenge. Subscriptions, usage-based pricing, renewals, and ongoing contract change introduce continuous complexity that traditional ERP systems were never designed to manage alone.

Microsoft Dynamics 365 Business Central provides a strong financial and operational core. However, its out-of-the-box capabilities focus on transactional processing, not the ongoing intelligence, automation, and cross functional visibility required by modern recurring revenue businesses. As a result, many SMBs and Microsoft Partners rely on manual workarounds, spreadsheets, or bespoke customisation—introducing risk, slowing growth, and eroding margin.

The Bluefort SMB Suite addresses this gap by introducing **an intelligent revenue layer** on top of Business Central—one that operationalises subscriptions, payments, and revenue data, while preserving BC as the system of record. At the centre of this approach is **LISA Business**, which extends Business Central with end-to-end subscription and recurring revenue operations: flexible billing models, controlled contract changes, renewals, proration, revenue recognition, and recurring revenue KPIs. This foundation is augmented by **Agentic AI**, starting with the **LISA Contract Entry Agent**, which interprets inbound customer requests and translates them into structured, auditable subscription actions—reducing manual effort while maintaining governance.

The suite also includes **TAPP**, which embeds payment orchestration directly into Business Central and Dynamics 365 Sales through Stripe, Adyen and GoCardless, to accelerate cash collection and reduce reconciliation friction, and the **BC Dataverse Integrator**, which exposes all Business Central data including custom or 3rd party entities, across the Microsoft ecosystem, to align finance, sales, and service teams around a single revenue reality.

For Microsoft Partners, this creates a repeatable, subscription-led growth model—shifting revenue from one-off projects to compounding post-go-live expansion, supported by enablement, services, and demand generation through the Bluefort Velocity Partner Programme.

For SMBs, it delivers predictable recurring revenue without replacing Business Central or adding operational overhead. Together, the Bluefort SMB Suite enables a shift from **ERP-centric execution to intelligence-led revenue operations**—built for the AI era, and designed to scale.

01 - Executive Context:

Why Recurring Revenue Now Demands Agentic AI

Across industries, SMB revenue models are undergoing a fundamental shift. One-off transactions and project-based engagements are increasingly giving way to subscriptions, usage-based services, and long-term commercial relationships. The promise is compelling: predictable cash flow, higher customer lifetime value, and stronger retention.

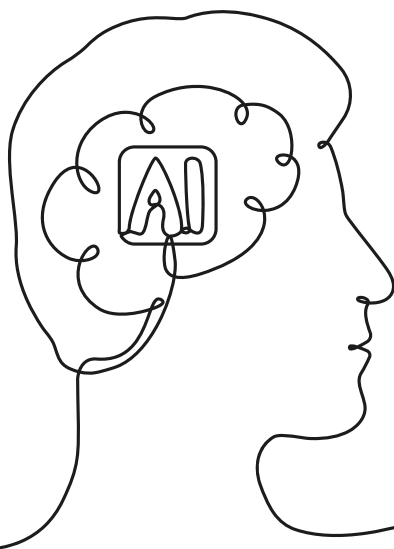
Microsoft Dynamics 365 Business Central has become the operational backbone for thousands of SMBs navigating this shift. It provides a robust, trusted foundation for SMB finance and operations teams. Yet recurring revenue introduces a new operational reality—one defined not by periodic transactions, but by continuous change.

Subscriptions renew, contracts evolve, usage fluctuates, pricing tiers change, and customers expect accuracy and transparency at every step. Managing this effectively requires more than reporting and manual oversight. It requires systems that continuously monitor, interpret, and act.

This is where Agentic AI becomes critical.

Traditional automation focuses on predefined rules. Copilot-style assistance helps users complete tasks faster. But recurring revenue demands a higher level of operational intelligence - **AI that does not simply assist, but actively participates in the revenue lifecycle.**

Agentic AI introduces this shift. It operates as an intelligent layer that observes ongoing activity, understands context, and proactively supports or triggers action. For SMBs and Partners seeking to scale recurring revenue on Business Central, this is no longer a future concept—it is a practical necessity.



02 - The Reality on the Ground:

Business Central and the Recurring Revenue Gap

Business Central performs exceptionally well as an ERP. Core financials, standard invoicing, and structured operational processes are handled with consistency, reliability, and full transparency. For many SMBs, it is the trusted system of record they rely on.

However, recurring revenue models introduce complexity that stretches beyond what Business Central was originally designed to manage.

"As soon as organisations introduce subscriptions, hybrid pricing, or usage-based billing, operational friction begins to surface. Subscription lifecycles become difficult to track. Contract amendments and renewals require manual intervention. Usage data must be interpreted and billed accurately. Exceptions become common rather than rare, creating inefficiencies that strain teams and complicate overall revenue management processes.

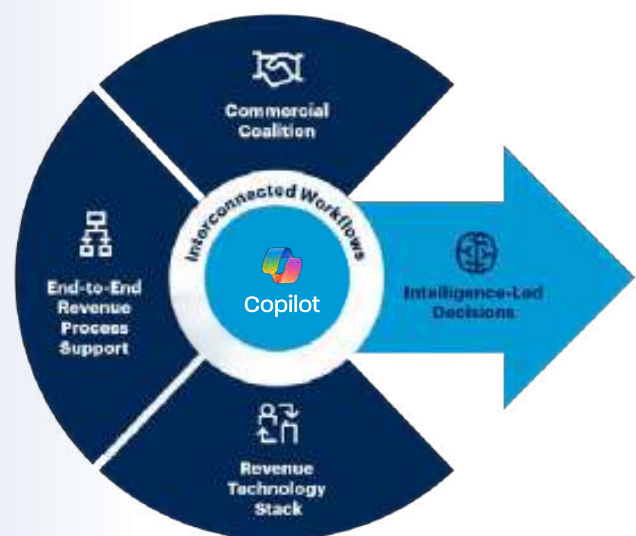
While Subscription Billing and related features address elements of recurring invoicing, they remain tactical in nature. They handle billing mechanics, not the full commercial and operational lifecycle.

The result is familiar across the ecosystem:

- Spreadsheets used to track renewals and amendments
- Manual reconciliations between contracts and invoices
- Custom development layered inside Business Central
- Heavy reliance on consultants for day-to-day adjustments

These challenges are often treated as configuration issues. In reality, they represent operating model gaps.

Recurring revenue is not a periodic accounting exercise. It is a continuous, evolving process that demands ongoing intelligence, visibility, and proactive control—capabilities that extend beyond the scope of a traditional ERP alone.



03 - The Pressure Cooker:

Commercial Consequences for SMBs and Partners

What These Pressures Lead To for SMBs

When recurring revenue is managed through manual processes and reactive tools, the commercial consequences are immediate and compounding.

Manual subscription handling leads to delayed or inaccurate invoicing, creating cash flow volatility and customer dissatisfaction. Poor contract visibility results in missed renewals, uncontrolled discounting, and inconsistent commercial terms across customers.

Without proactive oversight, finance and operations teams are forced into constant firefighting. Instead of optimising revenue, they spend time resolving exceptions, correcting errors, and responding to customer queries after the fact.

Perhaps most critically, revenue intelligence remains locked within finance. Sales and service teams operate without clear visibility into contract commitments, usage patterns, or renewal risk. Growth stalls not because demand is lacking, but because insight is absent.

Recurring revenue, intended to bring predictability, instead becomes a source of operational strain.

What These Pressures Lead To for Microsoft Partners

Partners experience a parallel set of pressures.

Selling recurring revenue solutions on Business Central often leads to longer sales cycles, as limitations must be explained and workarounds justified. Custom development becomes the default approach, increasing delivery risk and eroding project margins.

Bespoke solutions reduce repeatability. Each customer engagement becomes a unique implementation, difficult to scale and costly to support. Demonstrations become complex, increasing decision hesitation and deal fatigue.

Post go-live, partners remain heavily involved in operational support, limiting their ability to grow efficiently. The tension is clear: partners are expected to deliver modern, scalable revenue models using tools never designed for that purpose.

04 - From Assistance to Action:

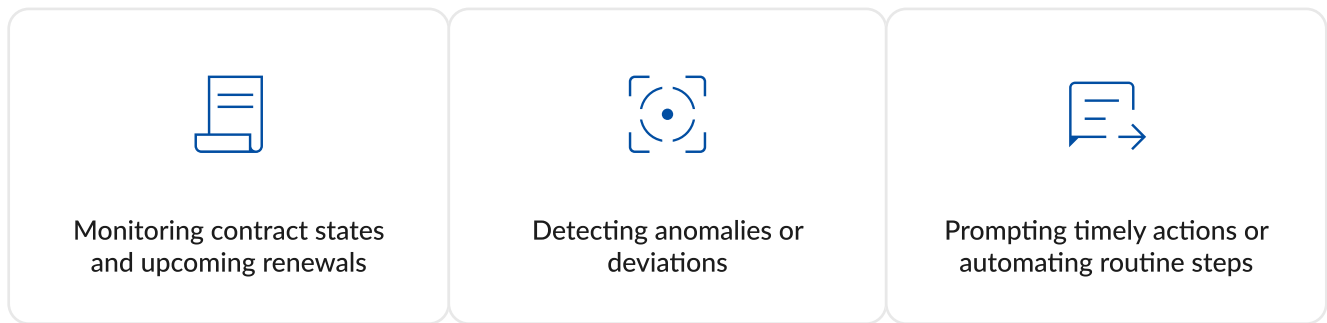
Why Agentic AI Changes the Game

Traditional automation relies on rigid rules. When conditions change, rules break. Chat-style assistance improves productivity but still depends on users to initiate action.

Agentic AI represents a different paradigm.

Rather than waiting for input, Agentic AI continuously monitors operational signals. It understands context—contracts, timelines, thresholds, and commercial intent—and supports or initiates action accordingly.

In recurring revenue scenarios, this means:



Agentic AI does not replace human decision-making. It removes cognitive and operational burden, allowing teams to focus on strategic oversight rather than administrative execution.

For subscription-driven businesses, this model aligns naturally with the continuous nature of revenue itself.



05 - Introducing the Bluefort SMB Suite:

One Vision, Two Clear Paths

The Bluefort SMB Suite is built around a simple principle: **Business Central as the robust ERP core**, while a purpose-built layer extends it to operate a modern recurring revenue business—complete with automation, intelligence, and the ability to scale.

That “layer” is not a single feature or a bolt-on workflow. It is a set of composable capabilities that:

- **Strengthen recurring revenue operations** (contract lifecycle, billing, renewals, changes, cancellations, revenue recognition, KPIs)
- **Remove payment friction** (requests, collections, reconciliation, refunds)
- **Expose Business Central data where revenue decisions happen** (Dataverse / CRM / service)
- **Introduce Agentic AI** to reduce manual effort and improve accuracy—starting with a contract-first copilot agent that can interpret inbound customer communications and translate them into controlled, auditable subscription actions.
- **Operationalise a full subscription supply chain**, where subscriptions are not limited to customer-facing contracts, but can also be purchased for internal use, procured from vendors on behalf of customers, and repackaged for resale. This includes the ability to ingest, validate, and monetise vendor usage-based consumption data as part of a controlled recurring revenue model.

Importantly, the suite supports **two clear adoption paths**.

Path 1 (Core Story): LISA Business + LISA Contract Entry Agent

LISA Business: Turning Business Central into a scalable subscription engine

LISA Business extends Business Central beyond “recurring billing mechanics” into **end-to-end subscription operations**—the day-to-day reality of running recurring revenue at scale.

At its core, LISA Business introduces an advanced subscription model that supports the commercial complexity SMBs and Partners encounter in real-world recurring revenue:

- **Flexible billing models, unified:** plan-based, seat-based, usage-based, and hybrid structures in one operational model—including open-ended subscriptions and contract-based subscriptions.
- **Mid-term change management built in:** upgrades, downgrades, line replacements, and add/remove scenarios without forcing the common (and risky) cancel-and-recreate pattern. Proration is handled automatically to reduce leakage and disputes.

- **Cancellations with control:** future-dated and reversible cancellation patterns including “cancel with reversal” (credit handling) designed to preserve auditability and financial integrity.
- **Versioning and audit trail:** full subscription history and the ability to understand what changed, when, and why—critical when subscriptions evolve quickly over time.

Beyond contract handling, LISA Business strengthens the operational and financial backbone needed for recurring models:

- **Automation and robustness at scale:** batch-oriented processing for billing, renewals, and changes—designed for high-volume operations where manual clicks do not scale.
- **Promotions and packaging agility:** configure commercial promotions by billing cycle (for example, introductory cycles) without relying on manual discounting.
- **Price uplifts and indexation:** automated uplift logic (including CPI-style indexation) to protect recurring revenue over time and reduce the risk of missed repricing exercises.
- **Delivery schedules and entitlements:** align what is billed with what is delivered—automating recurring delivery schedules that generate operational documents per cycle and supporting entitlement-style scenarios.
- **Finance-grade revenue management:** flexibility for deferrals and recognition approaches that go beyond simple straight-line patterns, supporting more complex subscription and bundle realities.
- **Subscription KPIs that management understands:** visibility into recurring business health through metrics such as MRR, ARR, churn, and revenue waterfall-style views—enabling proactive decisions rather than retrospective reporting.

The outcome: LISA Business reduces operational friction, improves billing accuracy, prevents revenue leakage during change events, and gives both SMBs and Partners a repeatable way to run recurring revenue in Business Central without heavy customisation.

LISA Contract Entry Agent: Agentic AI applied where recurring revenue begins

If LISA Business is the subscription engine, the LISA Contract Entry Agent is the first major step toward **Agentic AI operating inside recurring revenue workflows**.

Most recurring revenue friction starts at the same point: translating customer requests, emails, and contract documents into clean operational data—accurately, consistently, and fast.

The LISA Contract Entry Agent extends Microsoft’s standard Sales Order Copilot Agent capabilities to support subscription-centric selling and contract lifecycle management. Practically, it is designed to:

- **Interpret inbound customer communications** (including attachments) and convert intent into Sales Quotes and Sales Orders.
- **Translate Sales Orders into subscription outcomes** in LISA Business—either creating a new subscription/contract or applying changes to an existing one.

- **Support advanced subscription scenarios** in the same flow: subscription items, one-time fees, add-ons, and rule-based automatic add-ons.
- **Handle change events consistently** via Sales Orders: add lines, remove lines (with or without pro-rata credit), and future-dated cancellations.
- **Apply controlled automation for invoicing:** auto-invoicing only occurs when pre-defined conditions are met, maintaining governance and preventing uncontrolled billing.
- **Maintain full audit traceability:** linking emails, agent activity logs, sales documents, and subscription changes into a defensible history.

A critical design principle here is control: for example, pricing and discounts remain governed by Business Central pricing logic—creating a clear boundary between AI-driven interpretation and approved commercial rules.

The outcome: faster contract throughput, fewer errors, consistent application of subscription rules, and a scalable operational model where Agentic AI actively reduces administrative burden while preserving compliance and transparency.

Path 2 (Composable Extensions) TAPP + BC Dataverse Integrator

Not every organisation will start with subscription automation. Some need to solve payments friction first. Others need to unlock CRM and service alignment across the Microsoft ecosystem. That is why TAPP and the BC Dataverse Integrator are part of the SMB Suite, but not dependent on LISA Business.

TAPP: Payments and reconciliation embedded into the Microsoft workflow

TAPP brings payment orchestration into the applications your teams already use. In Business Central, TAPP enables organisations to link one or more payment provider accounts to a company, generate payment requests directly from invoices or orders, process payouts in Business Central, and automate key accounting steps such as customer payment receipts and reconciliation. It also supports operational realities such as retries, refunds, fees handling, and dispute processing—reducing the manual effort and exception handling typically required when payments sit outside the ERP.

In Dynamics 365 Sales / Dataverse, TAPP focuses on revenue acceleration and customer convenience:

- Stripe / Adyen / Go Cardless onboarding via an embedded, guided flow
- Multiple payment accounts and default account selection
- Capturing and reusing customer payment methods for repeat transactions
- Generating one-off payment links for invoices
- Refund handling and data reconciliation (payments, refunds, payouts)
- Analytics enablement and natural-language interaction via Copilot features

The outcome: faster cash collection, fewer payment exceptions, improved reconciliation, and a smoother customer experience—whether the transaction begins in ERP or CRM.

BC Dataverse Integrator: One data model across ERP and CRM—at scale

The BC Dataverse Integrator provides a reliable way to unify data between Business Central and Microsoft Dataverse—designed to eliminate integration complexity while increasing visibility across ERP and CRM environments by exposing all data between Dataverse and Business Central, including custom or 3rd party entities, fields, and system integrations seamlessly.

Key capabilities include:

- Supports standard and custom tables in Business Central and Dataverse for tailored processes.
- A rich mapping engine that aligns tables, fields, and data types, reducing integration errors.
- Selective synchronisation through query-driven subsets, ensuring teams synchronise what they need.
- Scalability and performance designed for growing data volumes and increasingly complex models.

The outcome: sales, service, and operations gain consistent access to the right data across the Microsoft stack enabling joined-up execution across the revenue lifecycle, not just finance.

06 - Use Case Vignette:

Agentic AI Powering the Full Recurring Revenue Stack

To understand how the Bluefort SMB Suite comes together in practice, consider the following realistic scenario one that reflects the day-to-day challenges faced by SMBs and Microsoft Partners operating recurring revenue models on Business Central.

The context

An SMB runs Dynamics 365 Business Central as its ERP. Its business model has evolved from one-off sales into a hybrid structure combining:

- Annual and monthly subscriptions
- Usage-based add-ons
- One-time onboarding and professional services

A Microsoft Partner supports both the initial implementation and ongoing optimisation of the solution.

The commercial ambition is clear: predictable recurring revenue, faster cash collection, and tighter alignment between finance, sales, and operations. The operational reality, however, tells a different story.

Before: Fragmentation, friction, and firefighting

Contracts are agreed with customers via email exchanges and attached documents. Key terms are manually interpreted and entered into Business Central. Subscription changes—upgrades, downgrades, cancellations—are handled inconsistently, often requiring manual calculations or workarounds.

Renewals are tracked outside the system. Invoicing is delayed when data is incomplete or unclear. Payments are chased manually. Sales teams have limited visibility into contract status, while service teams lack clarity on entitlements and commercial exposure.

For the Partner, every customer behaves like a bespoke implementation. Presales conversations are complex, delivery risk is high, and post-go-live support absorbs valuable capacity.

LISA Business establishes a subscription operating model

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Step 1:

LISA Business establishes a subscription operating model

The first shift comes with the introduction of **LISA Business**.

Subscription contracts are now structured, versioned, and managed as first-class operational entities. The SMB can support multiple billing models—subscription plans, usage-based components, and hybrid scenarios—within a single, consistent framework.

Mid-term changes are handled natively. When a customer adds users, removes services, or upgrades plans, LISA Business applies the change with correct proration and full audit traceability. Future-dated cancellations are scheduled rather than improvised. Revenue leakage caused by manual handling begins to disappear.

For the Partner, this immediately reduces solution complexity. Subscription logic becomes repeatable rather than bespoke, and the recurring revenue model can be confidently reused across customers.

Step 2:

The LISA Contract Entry Agent introduces Agentic AI at the point of change

Recurring revenue friction often reappears at the point of contract change—when customer intent must be translated into operational action.

This is where the **LISA Contract Entry Agent** comes into play.

Inbound customer emails and attachments are interpreted by the agent, which assists users by proposing structured Sales Quotes or Sales Orders aligned with LISA Business subscription logic. Whether the request is for a new subscription, an add-on, a downgrade, or a cancellation, the agent supports consistent, rule-driven outcomes.

Crucially, control is preserved. Pricing, discounts, and commercial rules remain governed by Business Central. Automated invoicing is only triggered when predefined conditions are met. Every agent-driven action is logged, auditable, and traceable back to the originating communication.

The result is a step change in throughput and accuracy. Contract changes are processed faster, errors are reduced, and operational teams are freed from repetitive administrative work—without sacrificing governance.

Step 3:

TAPP removes payment friction and accelerates cash flow

With subscription operations stabilised, the focus shifts to cash collection.

Using TAPP, the SMB embeds payment orchestration directly into its Microsoft workflows. Payment requests are generated from invoices and orders, customers can pay through familiar methods, and payments are automatically reconciled back into Business Central.

Retries, refunds, fees, and disputes are handled as part of the same process rather than through disconnected systems. Cash flow improves, and finance teams spend less time chasing payments or resolving exceptions.

Because TAPP also operates within Dynamics 365 Sales and Dataverse, sales teams can trigger payments where appropriate, while maintaining a consistent financial record in ERP.

Step 4:

The BC Dataverse Integrator connects revenue intelligence across teams

Finally, the BC Dataverse Integrator ensures that recurring revenue intelligence is no longer confined to finance.

Subscription status, contract values, payment outcomes, and any/all key commercial data are synchronised into Dataverse. Sales teams gain visibility into customer commitments and renewal timelines. Service teams understand entitlements and commercial exposure. Leadership gains a unified view of recurring revenue performance.

For the Partner, this unified data model enables deeper CRM-led engagements without fragile integrations or duplicated logic, improving efficiency, insights, and decision-making across teams.

The Outcome:

One stack, multiple gains

Together, the Bluefort SMB Suite transforms recurring revenue operations:

- Business Central remains the ERP core.
- LISA Business provides recurring revenue intelligence and control with end-to-end subscription operations.
- The Contract Entry Agent applies Agentic AI wherever change occurs.
- TAPP accelerates payments and reconciliation.
- The Dataverse Integrator delivers recurring revenue insights across Microsoft ERP.

What was once fragmented and manual becomes structured, intelligent, and scalable—for both the SMB and the Partner delivering the solution.



What This Means for Microsoft Partners

For Microsoft Partners, recurring revenue has long represented both an opportunity and a constraint. Demand is clear, but delivery complexity, risk, and margin pressure often limit how far partners can scale.

The Bluefort SMB Suite—anchored by LISA Business and augmented by Agentic AI fundamentally changes this equation. A shift from bespoke delivery to repeatable IP.

By introducing a structured subscription operating model on top of Business Central, partners move away from customer-by-customer customisation. Recurring revenue logic becomes repeatable intellectual property, not fragile project code.

This enables partners to:

- Standardise subscription models across industries.
- Reuse proven patterns for upgrades, renewals, and billing.
- Reduce reliance on senior consultants for routine changes.

The result is lower delivery risk and higher delivery margin. Shorter, clearer sales cycles. Selling recurring revenue on Business Central often stalls when complexity becomes visible too early. The Bluefort SMB Suite simplifies the narrative.

Instead of explaining limitations and workarounds, partners can demonstrate:

- A clear subscription lifecycle
- Controlled change management with auditability
- Embedded payment flows
- AI-assisted contract operations

Agentic AI—specifically the LISA Contract Entry Agent—becomes a powerful conversation opener, differentiating partners in competitive deals and reframing discussions around modern operating models rather than feature gaps.

Recurring revenue solutions traditionally increase partner involvement after go-live. With the Bluefort SMB Suite, the opposite occurs.

Automation, batch processing, and AI-assisted workflows reduce day-to-day dependency on partner intervention. Customers operate more independently, while partners retain visibility and control where it matters.

This allows partners to:

- Support more customers without adding headcount.
- Focus resources on higher-value advisory work.
- Shift from firefighting to optimization-driven services.

LISA Contract Entry Agent is the first step, not the end state. Partners adopting the suite position themselves at the forefront of Agentic AI adoption within the Microsoft ecosystem—ready to layer additional agents across sales, operations, and finance as customer maturity grows.

What This Means for SMB Decision Makers

For SMB leadership, the promise of recurring revenue is stability and scale—but only if the operating model can keep up. The Bluefort SMB Suite delivers a pragmatic path forward that does not require replacing Business Central or rearchitecting core systems.

Predictability without operational overload

By introducing structured subscription management, automated change handling, and embedded intelligence, SMBs gain:

- More accurate and timely invoicing
- Reduced revenue leakage during contract changes
- Clearer visibility into renewal pipelines and recurring performance

Agentic AI reduces manual intervention where errors most commonly occur, improving accuracy without increasing headcount.

Alignment across finance, sales, and service

Recurring revenue cannot be managed in isolation. With Business Central data exposed through Dataverse, sales teams understand customer commitments and renewal timelines. Service teams operate with clarity on entitlements and commercial exposure. Finance retains control over pricing, billing, and compliance.

The organisation operates as one revenue system, rather than a collection of disconnected functions.

Confidence to grow

Most importantly, leadership gains confidence. Confidence that recurring revenue models will not collapse under scale. Confidence that change events are controlled. Confidence that future growth will not demand disproportionate operational effort. Agentic AI works alongside teams, quietly handling complexity while decision-makers focus on strategy, growth, and customer relationships.



Strategic Takeaway: The Shift Is Already Underway

Recurring revenue is no longer a niche operating model—it is fast becoming the default expectation for how SMBs buy, pay, and engage. The organisations that win will not be those that customise Business Central the most, but those that **extend it intelligently**.

Business Central remains a strong ERP foundation. But modern recurring revenue requires more than transactional processing. It demands continuous intelligence, proactive control, and the ability to act at speed as contracts evolve, customers change, and revenue signals emerge.

The Bluefort SMB Suite introduces this capability through a composable, future-ready approach:

- **LISA Business** provides the subscription and revenue intelligence layer
- **Agentic AI** transforms how contracts and changes are operationalised
- **TAPP** accelerates and simplifies payments
- **The BC Dataverse Integrator** connects revenue insight across the Microsoft ecosystem

Together, these capabilities enable a shift from **ERP-centric execution to intelligence-led revenue operations**—without disrupting existing Business Central investments.

For SMBs, this means predictable growth without operational overload. For Partners, it means compounding revenue beyond go-live. The only strategic question left is not whether this model works—but **who will lead with it, and who will be forced to follow**.

Partners Enablement Programme

The **Bluefort Partner Velocity Programme** provides a repeatable, subscription-led growth model built on the Bluefort SMB Suite - **designed to shift growth from one-off projects to compounding, post-go-live revenue**. Rather than relying on bespoke implementations, partners gain access to proven subscription attach patterns, AI-enabled revenue use cases, and a clear path to monetising what happens after go-live. Margin compounds over time through a combination of software subscription margin, implementation and expansion services, and ongoing lifecycle optimisation.

Talk to us today to find out more about extended Partner Services including Partner Knowledge Expansion Programmes, Project Services where capacity becomes a constraint and Partner Acceleration with ready to use launch kits access to the Bluefort Marketing Development Fund.

Explore Your Path to Intelligent Recurring Revenue.

Whether you're scaling your Business Central install base or expanding recurring revenue across customers, we'll help you identify the right starting point.

Start the Conversation →

For Microsoft Partners and SMBs running on Dynamics 365 Business Central



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