

Bluefort Enterprise License Guide.



LISA Enterprise

Supercharge subscription management
for Dynamics FSCM.



TAPP

Payment fulfilment for Dynamic 365 App.
With Stripe, Adyen and GoCardless.

Product Overview

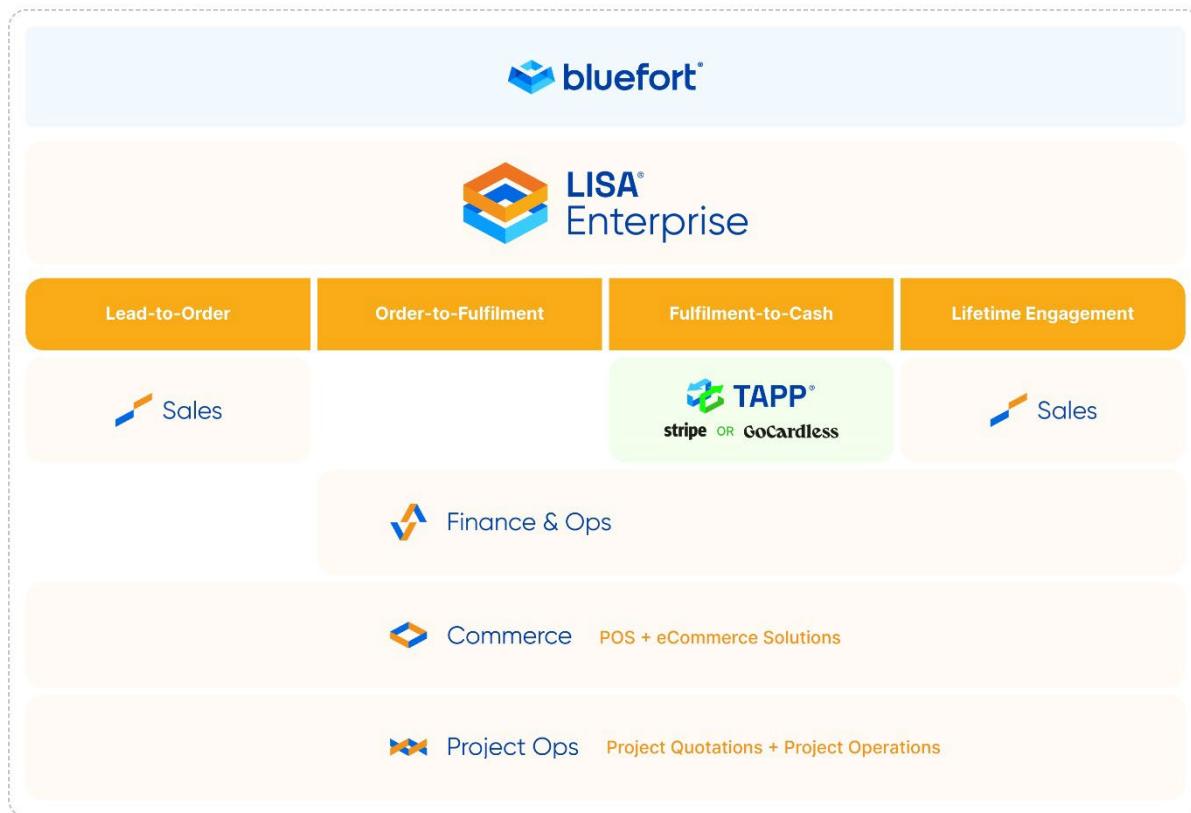
Enterprise Product Suite		
Product	LISA Enterprise	TAPP for D365 Finance & Sales
Purpose	<p>Recurring Revenue Operations</p> <p>The most powerful Recurring Revenue engine for Microsoft Dynamics 365 Finance & Operations. LISA Enterprise overlays powerful recurring revenue-specific capabilities directly onto native FSCM data models and surfaces them in Sales, Projects, Supply Chain, Purchasing, Commerce, and Power Platform analytics. One contract, one price book, one revenue rule shared in real time across the tenant.</p>	<p>Sales / Payments & AR Automation</p> <p>Effortless cash collection management in D365 Finance or Sales with one click, end-to-end automation for businesses of all types and sizes. Unshackle your finance department from manual processes with everything you need for a perfect customer payment experience.</p>
Technology Dependency	 Microsoft Dynamics 365 Finance & Operations  Microsoft Dynamics 365 Supply Chain Management  Microsoft Dynamics 365 Project Operations  Microsoft Dynamics 365 Commerce  Microsoft Dynamics 365 Sales	 Microsoft Dynamics 365 Finance & Operations  stripe  adyen  GoCardless

Bluefort offers a suite of innovative solutions designed to enhance and streamline various aspects of business operations, all leveraging the powerful Microsoft Dynamics 365 platform.

Here's a brief description of each product:

LISA Enterprise

LISA Enterprise is crafted to simplify complex recurring revenue business models, extending the capabilities of Microsoft Dynamics 365 to cater to mid-market and enterprise businesses. Built on Dynamics 365 Finance, LISA Enterprise enhances finance, operations, sales, and project management. It integrates seamlessly with Dynamics 365 Supply Chain Management, Dynamics 365 Commerce, Dynamics 365 Sales, and Dynamics 365 Project Operations, providing a comprehensive solution for businesses with sophisticated financial and operational needs.



Key Features:

- Advanced financial management.
- Enhanced supply chain and commerce capabilities.
- Integrated sales and project management tools.
- Tailored for mid-market to enterprise businesses.

Functionalities:

Finance & Ops

Dependency: Dynamics 365 Finance & Operations

This mandatory functionality supercharges recurring businesses with the highest grade of finance and operations technology, laying a vital foundation for organizations gearing up for long-term scale-up.

License Dependency:

- Microsoft Dynamics 365 Finance and
- Microsoft Dynamics 365 SCM

Note: base/attach mix does not matter.

Sales

Dependency: Dynamics 365 Sales

Integration: Utilizes Microsoft's official Dual-Write to integrate with Dynamics 365 Finance & Operations.

Enables sales teams to understand and manage recurring business contexts, maximizing revenue through cross-selling and up-selling initiatives that seamlessly integrate with the financial backend for comprehensive capabilities.

License Dependency:

- Microsoft Dynamics 365 Finance and
- Microsoft Dynamics 365 SCM -or- Microsoft Dynamics 365 Commerce
- Microsoft Dataverse with a database and Microsoft Dynamics 365 Sales deployed
- LISA Enterprise Finance & Ops

Note: base/attach mix does not matter.

Project Ops

Dependency: Dynamics 365 Project Operations

Integration: Utilizes Microsoft's official Dual-Write to integrate with Dynamics 365 Finance & Operations.

Allows bundling of professional services within recurring business models, monitoring time and expense entitlements, and ensuring accounting alignment with standards to avoid over-delivery.

License Dependency:

- Microsoft Dynamics 365 Finance and

- Microsoft Dynamics 365 SCM -or- Microsoft Dynamics 365 Commerce
- Microsoft Dataverse with a database and Microsoft Dynamics 365 Project Operations deployed
- LISA Enterprise Finance & Ops

Note: base/attach mix does not matter.



Dependency: Dynamics 365 Commerce

Retail subscriptions provide customers with regular, convenient deliveries of their favourite products at discounted rates, ensuring consistent revenue for businesses and a seamless shopping experience for consumers, whether through a retail box or an e-commerce platform.

License Dependency:

- Microsoft Dynamics 365 Finance and
- Microsoft Dynamics 365 Commerce
- LISA Enterprise Finance & Ops

Note: base/attach mix does not matter.

TAPP



TAPP automates cash collection and payment reconciliation within Microsoft Dynamics 365, supporting Dynamics 365 Finance, Dynamics 365 Sales, and Dynamics 365 Business Central. TAPP integrates with supported payment service providers, including GoCardless for direct debit and instant bank payments, Adyen and Stripe for card-based payments.

TAPP is available in multiple editions to address differing operational complexity and scale requirements.

TAPP Pro

TAPP Pro is designed for organisations with straightforward payment automation requirements. It supports standard cash collection and reconciliation scenarios and is typically suitable for lower-complexity environments.

TAPP Premium

TAPP Premium is designed for organisations with higher transaction volumes, multi-entity environments, or more complex operational and reporting requirements. It is intended to support enterprise-grade scale, controls, and extensibility.

TAPP Pro and TAPP Premium are paid subscriptions provided under Bluefort's Enterprise Products End-User Licence Agreement and an applicable Order. Both paid editions include structured enablement intended to support the customer through standard setup and configuration, production implementation and go-live. Delivery of these supporting services may be performed by Bluefort directly where expressly agreed in writing, or by the appointed Velocity Partner.

For TAPP Premium, the subscription may include customer-specific custom features that are directly interrelated with TAPP product processes ("Premium Custom Features"). Any Premium Custom Features included in the subscription must be explicitly described in the customer's Order (or an Order addendum). Bluefort will maintain and support those Premium Custom Features for the duration of an active subscription, provided they remain within scope and have not been modified by parties other than Bluefort.

Key Features:

- Automated cash collection.
- Integration with GoCardless and Stripe.
- Automated payment reconciliation.
- Compatible with multiple Dynamics 365 modules.

By leveraging the robust capabilities of Microsoft Dynamics 365, Bluefort's product suite offers tailored solutions that drive efficiency, streamline operations, and support the growth of businesses across various industries.

License Dependency:

- Microsoft Dynamics 365 Finance -or- Microsoft Dynamics 365 SCM

Note: base/attach mix does not matter.

Licensing Overview

LISA Enterprise

LISA Enterprise is licensed as an upfront billed subscription based on plans that include a combination of the following:

		Ignite	Grow	Scale
 LISA® Enterprise		<p>Supercharges recurring businesses with the highest grade of Finance and Operations technology. The vital foundation for organizations gearing up for long-term scale-up.</p> <p>Functionalities</p> <p>Finance & Ops</p>	<p>Powerfully integrates finance with sales and project management. For corporations embarking on exponential scale, requiring end-to-end recurring business management.</p> <p>Functionalities</p> <p>Finance & Ops Project Ops Sales Commerce</p>	<p>Brings the full recurring revenue suite at unlimited action levels for billing predictability at unparalleled product support. The ideal plan for large-scale enterprises.</p> <p>Functionalities</p> <p>Finance & Ops Project Ops Sales Commerce</p>
Annual Action Count	65,000 + 20% Grace		135,000 – 20% Grace	1,200,000 + 20% Grace
Customisation Maintenance	30% of customisation cost		30% of customisation cost	Included

Action Count Entitlement

Action counts increase with events such as generating sales order invoice lines, revenue recognition, generating purchase order lines, cost recognition, and more. There are three action count consumption types. These are:

1. **Monthly** – 1 action count is consumed for each month covered by the Date from and Date to fields of the generated action record. For example: Date from is **01/01/2024**, Date to is **31/12/2024**, action count is incremented by 12
2. **Fixed** – Action count is incremented by 1, agnostic from the dates on the action record created.
3. **Free** – Action count is not incremented at all for these action records created.

The following table maps each action type currently available in LISA Enterprise with its corresponding action consumption type.

Action Type	Action Consumption Type	Justification
<ul style="list-style-type: none"> • Sales Order (normal) • Project Sales Order (normal) 	Monthly	Effort required on a monthly cadence to track subscription which need to be billed even if plans are on a quarterly, half-yearly or yearly basis. Pro-rata calculations and discount calculations for invoicing and credit notes are handled automatically based on dates.
<ul style="list-style-type: none"> • Sales Order (for perpetual) • Project Sales Order (for perpetual) 	Fixed	Perpetual actions have no end dates so action count can only be incremented by one
<ul style="list-style-type: none"> • Sales Order (one time fee) • Project Sales Order (one time fee) 	Fixed	One time fees represent a one-off invoice so action count is incremented by one
<ul style="list-style-type: none"> • Purchase Order (normal) • Project Purchase Order (normal) 	Monthly	Effort required on a monthly cadence to track subscription which need to be recorded even if plans are on a quarterly, half-yearly or yearly basis. Pro-rata calculations and discount calculations for invoicing and credit notes are handled automatically based on dates.
<ul style="list-style-type: none"> • Purchase Order (for perpetual) • Project Purchase Order (for perpetual) 	Fixed	Perpetual actions have no end dates so action count can only be incremented by one
<ul style="list-style-type: none"> • Purchase Order (one time fee) • Project Purchase Order (one time fee) 	Fixed	One time fees represent a one-off invoice so action count is incremented by one
<ul style="list-style-type: none"> • Revenue Recognition Entry 	Monthly	Effort required on a monthly cadence to track subscription deferred revenue and do the necessary posting to recognise the revenues in the correct period and in line with the performance obligation standards of IFRS and ASC
<ul style="list-style-type: none"> • Cost Recognition Entry 	Monthly	Effort required on a monthly cadence to track subscription deferred costs and do the necessary posting to recognise the costs in the correct periods and align with revenue in reselling / project scenarios.
<ul style="list-style-type: none"> • Renewal Approval 	Monthly	Effort required on a monthly cadence to track subscription that are up for renewal and where applicable await for confirmation from customer to renew or

		cancel and feed this into financial processes
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Action Type	Action Consumption Type	Justification
<ul style="list-style-type: none"> • Product Entitlements • Project Hours Entitlements 	Monthly	Effort required on a monthly cadence to track subscription entitlements with what was actually consumed and bill additional overage or signal to the business to skip provisions when entitlements are fully consumed.
<ul style="list-style-type: none"> • Request for Deposit • Request for Security Deposit 	Monthly	Effort required on a monthly cadence to track deposits linked to subscriptions, automatically settle invoices with deposits and request new deposit payments as per contract

The system communicates all action counts in a transparent manner and it is possible to check the action counts in real time at all times. This can be done from the **Enterprise subscription automation parameters** form -> **License information** tab directly within Microsoft Dynamics 365 Finance and Operations.

If it is necessary to get a lower-level breakdown of the action counts one can click on the LISA usage and ROI button and a breakdown per action type and per company will be presented. The form also displays ROI calculations which your company is benefitting from by using LISA Enterprise.

Each plan has an annual action count limit with a 20% grace action entitlement. This grace period allows time for the customer or partner to settle payments to Bluefort before the license file is distributed.

If a Customer is expected to exceed the action count limit within the current annual term, then they can opt for a "Restart". Customers can only perform a "Restart" in the first 11 months of a 12 month subscription.

When a "Restart" is done, the remaining action entitlements are rolled forward to the additional refreshed entitlement in the new 12 month term. For the sake of clarity, no action entitlements are rolled forward when a subscription renewal is done (every 12 months).

The customer may decide to "Restart" with a higher plan if the expected annual action consumption is more aligned with the higher plan.

TAPP is licensed as a subscription-based product and is licensed independently from LISA Enterprise. Licensing is applied per tenant and is dependent on the selected TAPP edition, either TAPP Pro or TAPP Premium.

Functionalities

Finance & Operations: Requires Dynamics 365 Finance & Operations; provides advanced finance and operations technology.

Sales: Requires Dynamics 365 Sales; integrates with Dynamics 365 Finance & Operations via Dual-Write.

Project Operations: Requires Dynamics 365 Project Operations; integrates with Dynamics 365 Finance & Operations via Dual-Write.

Conditions:

- Licensees must have licensed all dependencies.
- Full payment is required before license provision.
- License granted for one Production Dynamics 365 Finance & Operations instance.
- Active monthly updates provided by Bluefort's engineering team.

TAPP

TAPP is licensed separately from LISA Enterprise. Licensees must have licensed all required dependencies and must comply with the end-user license terms of integrated payment service providers, including GoCardless and Stripe. TAPP licenses are granted for one production environment unless otherwise agreed in writing.

TAPP CE is available at no charge via Microsoft AppSource under the TAPP Community Edition EULA and is not supplied with subscription entitlements, support commitments, or implementation services. TAPP Pro and TAPP Premium are licensed per tenant and per application edition (Finance & Operations) under an active paid subscription. Use of TAPP in any edition requires the customer to comply with the terms of integrated payment providers and to maintain any required third-party accounts.

Where an Order includes Premium Custom Features, those features are treated as part of the Licensed Program for that customer for the duration of the active subscription and are maintained and supported by Bluefort within the agreed scope. Requests to add, remove, or materially change Premium Custom Features require a written quotation from Bluefort and an updated Order or Order addendum, and may incur one-time and/or recurring fees bundled into the subscription commercial terms

Conditions:

- Licensees must have licensed all dependencies.
- Must abide by End-User License terms of integrated providers (GoCardless, Stripe).

How to Buy:

Enterprise licenses may be procured either through direct engagement with Bluefort or through authorised members of the Bluefort Enterprise Partner Program. Depending on the

customer's circumstances, the customer may obtain an Order either via an authorised partner channel or directly with Bluefort. SMB products licensed through the Bluefort Velocity Partner Program are governed by separate licensing and commercial frameworks and are not covered by this guide.

For avoidance of doubt, TAPP Community Edition is governed by the TAPP Community Edition EULA, while TAPP Pro and TAPP Premium subscriptions are governed by the Enterprise Products EULA together with the applicable Order.

Applicable License Terms

When using Bluefort software, customers agree to Bluefort's End User License Terms.

<https://bluefort.io/commercial/enterprise-end-user-licence-agreement-1-0/>

FAQs

LISA Enterprise

Q: We are currently licensed for LISA BusinessPro with add-ons, what do we do?

A: Your current plans will continue as usual. If any transition is required in the future, a Bluefort Customer Success Executive will contact you to guide you through the process.

Q: If we license LISA Enterprise, which Microsoft Dynamics 365 apps do I need to license?

A: You need to license Microsoft Dynamics 365 Finance & Operations. Depending on which plan you license, you may be eligible for additional functionalities which depend on additional Dynamics 365 products - refer to Product Overview section of document to determine dependencies.

Q: We licensed only Microsoft Dynamics 365 Finance, but we require a LISA Enterprise plan that includes functionalities that we don't use, such as Commerce or Project Operations. Can I still purchase the plan and deploy this LISA Enterprise plan?

A: Yes, you can. LISA Enterprise functionalities are modular and can be enabled or disabled based on your requirements. If you don't need Commerce, you can switch it off as required.

Q: If I purchase the LISA Enterprise plan and after several months my action count reaches the maximum, how can I add more actions?

A: When your action count reaches the maximum, you can perform a "Restart". This allows you to procure and pay for a new year of action entitlements. If you decide to "Restart" before your current action count entitlement is fully consumed and before the license annual renewal, the remaining actions will roll over to the new term. Additionally, you can upgrade to a higher plan during the "Restart" to ensure sufficient coverage for the upcoming year. For the sake of clarity, action entitlements do not roll over to a new term in the license annual renewal.

For guidance on actioning the above, you may contact the Customer Success team on customersuccess@bluefort.io

Q: Can we downgrade from LISA Enterprise to a lower plan?

A: Yes, you can downgrade your plan upon your anniversary renewal with one month's notice. Notify Bluefort Licensing according to the terms to process the downgrade.

Q: Can I extend the LISA applications based on Microsoft Dynamics 365 platform extension capabilities?

A: Yes, you can use standard Microsoft Dynamics 365 extension tools to extend LISA applications. For scenarios requiring support, submit a support ticket to Bluefort Support.

TAPP

Q: What is the difference between TAPP Pro and TAPP Premium?

A: TAPP Pro is designed for standard payment automation scenarios and lower-complexity environments. TAPP Premium supports higher transaction volumes, more complex operational requirements, and enterprise-scale deployments. The appropriate edition depends on the customer's scale, architecture, and operational needs.

Q: Is TAPP free for Enterprise customers?

A: No. TAPP is licensed as a subscription-based product. Commercial terms depend on the selected TAPP edition and the engagement model, whether direct with Bluefort or through an authorised Enterprise Partner Program partner.

Q: Can Enterprise customers use TAPP Pro?

A: Yes. While Enterprise customers typically deploy TAPP Premium, TAPP Pro may be appropriate for lower-complexity enterprise scenarios, subject to assessment by Bluefort or an authorised Enterprise partner.

Q: Does TAPP licensing include payment provider fees?

A: No. TAPP licensing does not include fees charged by payment service providers such as GoCardless, Stripe or Adyen. Customers must enter into and maintain separate agreements with these providers.

Q: What are the conditions for using TAPP?

A: To use TAPP, you must ensure all dependencies are licensed. You must also abide by the End-User License terms of integrated providers, currently including GoCardless and Stripe.

Q: Can TAPP be extended using Dynamics 365 platform capabilities?

A: Yes, you can use standard Microsoft Dynamics 365 extension tools to extend TAPP. For scenarios requiring support, you may submit a support ticket to Bluefort.

Q: What integrations does TAPP support?

A: TAPP supports integrations with GoCardless for direct debit payments and Stripe for credit card payments, providing comprehensive cash collection automation.

Q: How does TAPP handle bank payment reconciliation?

A: TAPP simplifies bank payment reconciliation, by ensuring that bank transactions posted in the ERP match what will be later shown on the bank statement.

Q: What is TAPP Community Edition and how does it differ from TAPP Pro and TAPP Premium?

A: TAPP Community Edition is the no-charge self-service edition available online via Microsoft AppSource. It is governed by the TAPP Community Edition EULA and does not include support, service levels, implementation services, training, migrations, or custom development by Bluefort. TAPP Pro and TAPP Premium are paid subscriptions governed by the Enterprise Products EULA together with an Order, and include structured enablement support for setup and go-live.

Q: If we start on Community Edition, can we upgrade to Pro or Premium later?

A: Yes. Customers may upgrade by executing a paid Order for TAPP Pro or TAPP Premium. From the effective date of the paid Order, the paid agreement governs the subscription entitlements for Pro/Premium.

Q: Do TAPP Pro and Premium include implementation and go-live?

A: No. Both editions include structured enablement intended to support standard setup and configuration, production implementation, go-live, and migrations reasonably required for go-live within the agreed scope. Depending on the customer's engagement model, these services may be delivered by the appointed Enterprise Program partner as Partner Services under a separate agreement, or delivered directly by Bluefort where expressly agreed in writing in the customer's Order.

Q: Can we include custom features with TAPP?

A: Custom features may be included with TAPP Premium where they are directly interrelated with TAPP product processes. Any Premium Custom Features must be explicitly described in the customer's Order (or an Order addendum). Bluefort will maintain and support those included Premium Custom Features for the duration of an active subscription, provided they remain within scope and have not been modified by parties other than Bluefort.

Q: If we want to add or remove Premium Custom Features after go-live, what is the process?

A: Request a written quotation from Bluefort. If approved, the change will be documented in an updated Order or Order addendum, and may incur one-time and/or recurring fees that are bundled into the subscription commercial terms.

Q: If we don't have an Enterprise partner, can we still buy TAPP Pro/Premium?

A: Yes. Where the customer does not yet have an appointed Enterprise Program partner nor wants to work with one, Bluefort may contract directly to avoid delaying provisioning and will support the customer in appointing a Enterprise Program partner for ongoing first-line support and partner services.