

Bluefort SMB Licensing Guide.



LISA
Business



LISA Business
Copilot Agents



TAPP for D365
BC & Sales



BC-DataVerse
Integrator

Purpose of This Guide























This guide defines the **licensing scope, principles, and conditions** for Bluefort Small & Medium Business (SMB) products.

It is intended for:

- SMB customers evaluating Bluefort solutions
- Bluefort Velocity Program partners responsible for quoting and selling
- Internal sales, pre-sales, and customer success teams

Pricing is intentionally excluded from this document. Commercial terms, discounts, and final pricing are provided **exclusively by authorised Velocity Program partners**.

Product Overview

 SMB Product Suite				
Product	 LISA Business	 LISA Business Copilot Agents	 TAPP for D365 BC & Sales	 BC-DataVerse Integrator
Purpose	Subscription & Recurring Revenue Management An integrated Dynamics 365 Business Central Sales solution for managing subscription contracts across their full lifecycle. It supports creation from quotes or orders, renewals and amendments, flexible billing and pricing models, automated proration and CPI indexation, and seamless data flow with the CE stack via the Bluefort BC DataVerse Integrator.	Agentic Automation & Insights Powerful AI Agents for LISA Business, taking automation to the next level. <ul style="list-style-type: none"> • AI that instantly turns any email, Teams message, or attachment into a ready-to-post subscription. • AI that links BC data and customer sentiment to retain and grow accounts. 	Sales / Payments & AR Automation Effortless cash collection management in D365 BC 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 .	CE & Ecosystem Enablement Seamless synchronization of all data between Dynamics 365 Business Central and Microsoft Dataverse – including third-party ISV and Custom solutions – exposing the full power of BC data across the Dynamics 365 CE stack to ensure accurate, scalable data flows across systems, teams, and sales workflows.
Technology Dependency	 Microsoft Dynamics 365 Business Central  Microsoft Dynamics 365 Sales	 Microsoft Dynamics 365 Business Central  Microsoft Dynamics 365 Sales  Copilot	 Microsoft Dynamics 365 Business Central  Microsoft Dynamics 365 Sales   	 Microsoft Dynamics 365 Business Central  Microsoft Dynamics 365 Filed Service  Microsoft Dynamics 365 Project Operations  Microsoft Dynamics 365 Sales  Microsoft Dynamics 365 Customer Service  Microsoft Dynamics 365 Customer Insights  Microsoft Dynamics 365 Dataverse

Bluefort SMB solutions extend Microsoft Dynamics 365 Business Central and related workloads with automation, intelligence, and scalable commercial capabilities. All products are delivered as add-ons, aligned with Microsoft's platform architecture and best practices..

BC Dataverse Integrator



BC Dataverse Integrator enables structured, near-real-time data synchronisation between:

- Microsoft Dynamics 365 Business Central
- Microsoft Dataverse
- Power Platform and Dynamics 365 applications that rely on Dataverse

Typical use cases include:

- Enabling Dynamics 365 Sales alongside Business Central
- Supporting Power Apps and Power Automate scenarios
- Creating a unified customer and transaction data layer

Target customer:

SMBs that require deeper integration across the Microsoft ecosystem beyond Business Central alone.

License Dependencies:

1. Microsoft Dynamics 365 Business Central Essentials / Premium
2. Dataverse environment with a database provisioned
3. Microsoft Dynamics 365 Sales or Customer Service deployed on the Dataverse environment.
4. Azure Subscription

LISA Business



LISA Business is Bluefort's **SMB subscription and recurring revenue management solution**, purpose-built for Microsoft Dynamics 365 Business Central.

It supports:

- Subscription billing and renewals
- Usage and entitlement tracking
- Predictable recurring revenue visibility
- Lightweight operational control without enterprise complexity

Key positioning:

LISA Business delivers structured recurring revenue management while remaining simple to deploy, operate, and scale as the business grows.

License Dependencies for LISA Business:

1. Microsoft Dynamics 365 Business Central Essentials or Premium

License Dependencies for LISA Business CRM:

1. Microsoft Dynamics 365 Business Central Essentials or Premium
2. Dataverse environment with a database provisioned
3. Microsoft Dynamics 365 Sales deployed on the Dataverse environment.
4. Bluefort LISA Business
5. Bluefort BC Dataverse Integrator

LISA Business Agents



LISA Business Agents extend LISA Business with **pre-configured, task-specific automation**.

Agents are designed to:

- Operate within a defined functional scope
- Reduce manual operational effort
- Improve consistency and data quality

Examples include:

- LISA Contract Entry Agent
- LISA Customer 360 Agent

Important: LISA Business Agents do **not** include Copilot or AI usage credits. Any AI or Copilot services must be licensed separately via Microsoft or other providers.

License Dependencies:

1. Microsoft Dynamics 365 Business Central Essentials or Premium
2. LISA Business
3. Copilot credit packs or Pay-as-you-go via Azure. These are required even on a sandbox environment if testing exceeds the free monthly tenant quota from Microsoft.

TAPP



TAPP automates cash collection and payment reconciliation for Microsoft Dynamics 365 Business Central and Dynamics 365 Sales. It integrates with supported payment service providers, including GoCardless, Stripe and Adyen.

TAPP is available as a Community subscription edition. The Community Edition (“TAPP Community Edition” or “TAPP CE”) remains available online at no charge via Microsoft AppSource for self-service use. TAPP CE is governed by its own Community Edition end-user licence agreement and is provided without support, service levels, implementation services, training, migrations, or any custom development by Bluefort. If a customer later executes a paid TAPP Pro or TAPP Premium subscription order, that paid agreement applies from its effective date.

TAPP Pro

Designed for SMBs with:

- Straightforward payment automation needs
- Single-entity or low-complexity environments
- Standard reconciliation and settlement workflows

TAPP Premium

Designed for SMBs with:

- Higher transaction volumes
- Multi-entity or more complex settlement scenarios
- Advanced operational or reporting requirements

TAPP Pro and TAPP Premium are paid subscriptions provided under Bluefort’s SMB 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, Stripe and Adyen.

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 Dependencies:

1. Microsoft Dynamics 365 Business Central Essentials / Premium for TAPP BC
2. Azure Subscription is only required for TAPP Adyen BC
3. Dataverse with database deployed and at least one Dynamics 365 Customer Engagement app (Sales/Customer Service/Field Service) for TAPP CRM.

Licensing Overview

All Bluefort SMB products are licensed as annual upfront subscriptions.

Licenses are:

- Non-transferable
- Bound to a single Microsoft Dynamics 365 tenant unless otherwise stated
- Subject to acceptance of Bluefort's End User License Agreement (EULA)

BC Dataverse Integrator

Licensed per user

A minimum number of 3 users applies

User count is calculated based on the total Business Central user base within the tenant

LISA Business

Licensed per user

A minimum number of 3 users applies

User count is calculated based on the total Business Central user base within the tenant

LISA Business Agents

Licensed per tenant

Licensed per agent type

Once licensed, the selected agent may be deployed across the tenant without per-user constraints.

TAPP

TAPP Community Edition 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 (Business Central or Sales) 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.

Licensing Conditions

- All prerequisite Microsoft licenses must be in place prior to activation.
- Full payment must be received before license provisioning.
- Licenses are granted for one production environment.
- Updates, fixes and maintenance are provided as part of the active subscription.

How to Buy

Bluefort SMB subscriptions are typically transacted through authorised Velocity Program partners. Depending on the customer's circumstances, the customer may obtain an Order either via an authorised partner channel or directly with Bluefort. Where the customer does not yet have an appointed Velocity Program partner at the time of purchase, Bluefort may contract directly to avoid delaying provisioning and will support the customer in appointing a Velocity Program partner for ongoing first-line support and partner services.

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 SMB Products EULA together with the applicable Order.

Partners are responsible for:

- Quoting and commercial structuring
- Customer contracting
- First-line support
- Renewal management
- Customer relationship ownership

Bluefort provides:

- License provisioning
- Product updates
- Second-line support and escalation
- Partner enablement and training

Applicable License Terms

Use of Bluefort SMB Products is subject to Bluefort's SMB Products End User License Agreement (EULA).

The latest version is available at <https://bluefort.io/commercial/smb-products-end-user-licence-agreement-1-0/>

FAQs

General Licensing

Q: Why is pricing not included in this guide?

A: Pricing is intentionally excluded to allow Velocity Program partners to:

- Correctly size licenses
- Bundle services
- Apply partner-specific commercial terms

This ensures customers receive an accurate and tailored quotation.

Q: Who do we purchase SMB licenses from?

A: All SMB licenses must be purchased through an authorised Bluefort Velocity Program partner. Bluefort does not sell SMB licenses directly.

Q: Are licenses billed monthly or annually?

A: SMB licenses are billed as annual upfront subscriptions, unless otherwise agreed.

Q: Can licenses be upgraded or downgraded?

A: Upgrades may be possible during the subscription term, subject to partner terms
Downgrades typically occur at renewal
Details are governed by the partner agreement.

User Counts & Tenants

Q: What does “total Business Central user base” mean?

A: It refers to all licensed Business Central users within the tenant, regardless of role or usage frequency, unless otherwise specified in the partner quote.

Q: Can we license only a subset of users?

A: No. SMB licenses that are user-based apply to the full Business Central user base to ensure operational consistency and compliance.

Q: Are multiple tenants covered by one license?

A: No. Each tenant requires its own subscription unless explicitly agreed otherwise.

Environments

Q: Is a sandbox or test environment included?

A: Sandbox or non-production rights depend on the specific commercial agreement arranged by your Velocity partner.

Q: Can we move licenses between environments?

A: Licenses are issued for a production environment. Any environment changes must be coordinated via your partner and Bluefort.

LISA Business & Agents

Q: Does LISA Business require Dynamics 365 Sales or Finance?

A: No. LISA Business is designed specifically for Microsoft Dynamics 365 Business Central.

Q: Are LISA Business Agents AI-powered?

A: Agents provide intelligent automation but do not include Copilot or AI usage credits. Any AI services must be licensed separately.

TAPP

Q: How is TAPP installed?

A: TAPP is distributed via Microsoft AppSource and activated through Bluefort licensing.

Q: Does TAPP handle payment reconciliation automatically?

A: Yes. TAPP automates reconciliation for supported payment providers, reducing manual finance effort.

Q: Which payment providers are supported?

A: Currently supported providers include GoCardless, Stripe and Adyen. Additional providers may be added over time.

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 SMB 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 Velocity 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 a Velocity partner, can we still buy TAPP Pro/Premium?

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

Extensibility & Support

Q: Can Bluefort solutions be extended?

A: Yes. Standard Microsoft Dynamics 365 extension mechanisms may be used.

Q: Who provides support?

A:

First-line support: Velocity Program partner

Second-line support and escalation: Bluefort