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Bonuses & Accruals

Bonuses & Accruals application extends the discount functionality available in Microsoft Dynamics 365 Business Central. The application offers the functionality for:

- **bonuses that are granted after an invoice is posted, i.e. rebates** (retrospective payment). Such rebates are set based on sales/purchase targets met by your company and are settled only after the completion/posting of a transaction (as opposed to the so-called front-end discounts, which are calculated when a sales/purchase transaction is entered);
- **recording other bonuses/rebates calculated based on the sales/purchase amount and sales/purchase quantity**, including commissions and for sales staff and sales representatives, loyalty programs, royalties, etc.

The **Bonus Card** page is the main element of the Bonuses & Accruals application, which you can use to set up and manage:

- **bonus types** based on calculation parameters such as a calculation base and method, general ledger accounts, and details on how bonuses are to be posted and settled,
- **bonus calculation setup** based on bonus calculation thresholds and percentages or amounts to be calculated for a specified threshold progressively or from the highest threshold (sales volume),
- **bonus recipients**, including persons and organizations,
- **items or resources sold for which bonuses/rebates are calculated**,
- **periods** for which bonuses are to be calculated,
- **recurring bonuses and automatic creation of new bonus cards** based on a selected recurring frequency.

General Overview

All accruals records for a calculated bonus amount are stored in the sub-ledger in Microsoft Dynamics 365 Business Central. Depending on the settings, you can post accruals for the bonuses calculated.

Alternatively, you can post accruals amounts to inventory ledgers, which affects the sales statistics (by creating value entries).

After the bonus period has ended, the bonus is closed and you can settle it manually or by issuing a sales credit memo or purchase invoice.

After the bonus settlement document is created, it is possible to print the bonus summary for all linked transactions.

> **ℹ NOTE**
>
> Bonuses & Accruals for Microsoft Dynamics 365 Business Central® is an application available in both license models: cloud (online, SaaS) and on-premises (perpetual license and subscription). Since the Business Central 2019 release wave 2 , the Bonuses & Accruals application is offered as a single solution for both the online and on-premises versions of Microsoft Dynamics 365 Business Central.

The topics listed below have been described in this documentation.

Business Processes

- New and Planned

    - Application Roadmap

    - Release Notes

- Business Functionality

    - General Settings
    - Bonus Type
    - Bonus Card
    - Bonus Entries

- Accruals
  - Settlement
  - Recurring Bonuses
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Administration and Installation

- System Requirements

- Installation and Registration

Product Lifecycle Policy

- Product Lifecycle Policy

Business Central - Base Application

Bonuses & Accruals has been designed based on the technology and functionality of Microsoft Dynamics 365 Business Central

Business Central, as a popular ERP system, supports the management of small and medium-sized companies worldwide, enabling them to automate and streamline their business processes in many business areas.

> **ℹ TIP**
>
> Documentation for Business Central, the base application, has been published on IT.integro Docs.

Get Started with Bonuses & Accruals

To get started with Microsoft Dynamics 365 Business Central and Bonuses & Accruals, contact IT.integro at appsales@it.integro.pl.

See Also

Bonuses & Accruals on the Microsoft AppSource marketplace

IT.integro applications for companies in Poland and global companies

Other applications in the IT.integro offer

Business Central base application documentation

Policies for Product Documentation and Related Online Documents

New and Planned

Bonuses & Accruals is developed according to a set schedule that represents technological changes and the requirement submitted by IT.integro customers and partners. The following table contains links to the articles that describe the application development roadmap and versions released according to the roadmap.

TO	SEE
Get insight into the Bonuses & Accruals roadmap and learn the rules for planning development works	Application Roadmap
Learn what is new in the application versions that were released	Release Notes

See Also

Product Lifecycle Policy

The roadmap for the standard Business Central application has been described in New and Planned

Contact IT.integro at appsales@it.integro.pl

Bonuses & Accruals Roadmap

This article presents the development plans for the Bonuses & Accruals application.

The list below includes:

- functionalities made available within Bonuses & Accruals, starting from the first release of the application which was developed for Microsoft Dynamics 365 Business Central 18 and
- functionalities, the provision of which has been or will be planned for subsequent releases as part of the product roadmap.

In the case of planned functionalities, the dates declared may be changed; it is also possible that development tasks and functionality release may be cancelled.

👉 **IMPORTANT**

Deadlines for the completion of tasks that have been specified in the table are subject to change depending on the current priorities. Primarily, the priorities for development tasks related to individual functionalities depend on:

- legal requirements, taking into account the applicable deadlines for providing end users with functionalities that support these requirements,
- unforeseen changes in the scope of legal requirements,
- technological changes and changes in the base application introduced by Microsoft, which have an impact on ensuring the compatibility of Bonuses & Accruals,
- demand reported by project teams and IT.integro partners,
- importance for the operation of the application in the context of related functionalities.

👉 **IMPORTANT**

The rules for maintaining the compatibility of Bonuses & Accruals with Dynamics 365 Business Central have been described in Product Lifecycle Policy.


Completed and Planned Development Tasks

The table in this section shows the development plans and roadmap for Bonuses & Accruals.

The functionalities included in the application roadmaps are developed:

- due to legal requirements,

- as improvements in the functionality of the application,

- as application performance improvements resulting from technological changes.

The table also specifies the status of development tasks for individual functionalities:

- the 🗹 symbol means that development of a given functionality has been completed and the functionality has been made available as part of the published version, the number of which is specified in the **Availability from version** column ;

- the **In progress** status means that the development team is working on a given functionality to be released, and the release date has been specified in the **Planned Date** column in a respective row;

- the **To be planned** status means that development has not started yet and no release date has been scheduled. The release date will be determined depending on the priorities set.

FUNCTIONALITY	IMPLEMENTATION STATUS	PLANNED RELEASE DATE	AVAILABLE FROM VERSION
User defined bonus - a possibility to assign the bonus amount by a user on the sales document line	🗹🗹	April 2023	1.4.0
Purchase bonuses - calculation of bonuses based on purchase transactions	🗹🗹	May 2023	1.5.0
Excluding documents from bonus calculation	🗹🗹	November 2023	1.7.0
Grouping multiple bonuses within a single bonus contract	🗹🗹	November 2023	1.7.0
Settle-with functionality to calculate commissions based on other customers' sales results.	🗹🗹	January 2024	1.8.0
Purchase bonus: Calculation of bonus entries based on the expected cost from purchase receipts	Not started	Q2 2024	-
Possibility to set up different asset sets (conditions) for thresholds within a single bonus card	Not started	Q4 2024	-

See Also

Contact IT.integro at appsales@it.integro.pl Bonuses & Accruals on the AppSource Marketplace

Policies for Product Documentation and Related Online Documents

Release Notes

This article lists the released versions of Bonuses & Accruals for Microsoft Dynamics 365 Business Central.

> 👉 **IMPORTANT**
>
> If a lower version of Microsoft Dynamics 365 Business Central than the version specified in the table was installed, use a Bonuses & Accruals that is compatible with Microsoft Dynamics 365 Business Central version.

Versions

- 1.9.0
- 1.8.3
- 1.8.2
- 1.8.1
- 1.8.0
- 1.7.1
- 1.7.0
- 1.6.3
- 1.6.2
- 1.6.1
- 1.6.0
- 1.5.0
- 1.4.0
- 1.3.1
- 1.3.0
- 1.2.3
- 1.2.2

See Also

Installation and Registration

Technical Support - Contact IT.integro or your Business Central partner

Release Notes

This article lists the released versions of Bonuses & Accruals Extension PL for Microsoft Dynamics 365 Business Central.

> ☞ **IMPORTANT**
>
> If a lower version of Microsoft Dynamics 365 Business Central than the version specified in the table was installed, use a Bonuses & Accruals Extension PL that is compatible with Microsoft Dynamics 365 Business Central version.

Versions

- 1.0.1
- 1.0.0

See Also

Installation and Registration

Technical Support - Contact IT.integro or your Business Central partner

Learn

In this article, you can find information and links to educational and training resources for the Bonuses & Accruals application. The resources will help you get started fast with implementing and using the application.

Training Videos

Bonuses & Accruals training videos that describe the settings and processes are available on the ITintegroTV (YouTube channel). Under the Bonuses & Accruals playlist on the channel, you can find a collection of the **How Apps Work** videos.

Demo Presentation and Training

If you are interested in a demo presentation of the Bonuses & Accruals solution, contact us at appsales@it.integro.pl.

We will also be pleased to support our partners in the sales process by joining their meetings with customers and presenting the solution. We can also provide our partners with training sessions and support during the first implementation and go-live.

Try

Bonuses & Accruals is available on the Microsoft AppSource marketplace. You can get the free trial version and install the app on your sandbox environment. The free trial subscription is valid for 30 days. To extend the subscription, contact our sales team at appsales@it.integro.pl.

> **ⓘ NOTE**
>
> Bonuses & Accruals for Microsoft Dynamics 365 Business Central® is an application available as a single solution in both license models: cloud (online, SaaS) and on-premises (perpetual license and subscription).

See More

Installation and Registration

Bonuses & Accruals on the Microsoft AppSource marketplace

Buy

Bonuses & Accruals can be bought only from a Microsoft Dynamics 365 Business Central partner or IT.integro.

To purchase the application, contact your Business Central partner.

The current pricing information is available in Bonuses & Accruals Pricelist.

> ❶ **TIP**
>
> Before you buy the application, you can download the free trial version from the AppSource offer page or contact your partner.

See More

Free Trial

Bonuses & Accruals on the Microsoft AppSource marketplace

Product Portal for Partners

IT.integro Product Portal is a platform dedicated to IT.integro partners. It provides a collection of useful links and materials and access to the latest application versions. The resources are available under several categories.

> **ⓘ TIP**
>
> If you are interested in becoming an IT.integro partner and app reseller, read Become an IT.integro Partner.

Commercial Documents

In this section you can get:

- license terms documents that describe the terms and conditions under which IT.integro software can be used by end users of Business Central;
- the information about the product lifecycle policy (see more: Product Lifecycle Policy)
- Upgrade Policy document that contains the rules for upgrading the IT.integro solutions.

Marketing Materials

In this section, you can get the marketing collateral that you can use in your sales process as an IT.integro partner,including:

- a brandbook and e-books for IT.integro partners
- applications logos, infographics and mock-ups,
- sales presentations and graphics for your social media.

All of the materials are available in the English and Polish languages.

Downloads

The section provides application versions released for the different versions of Business Central and runtime packages required for on-premises installations.

> **ⓘ NOTE**
>
> If you cannot find the runtime package compatible with your customer's Business Central build version, you should submit a service desk ticket to have it prepared. For more information, read Help and Support.

Help and Support

Organizations that use the Bonuses & Accruals application as end users can get technical support for any issues that they may experience when using the app. Support tickets must be submitted via their partners. The partner should be the first line of support for an end user and the one who should decide if the issue is to be handed over to IT.integro and a ticket should be created and submitted to IT.integro.

☞ **IMPORTANT**

IT.integro uses Jira software to manage the service desk. Access to the service desk portal is provided after signing the partnership agreement with IT.integro. Support for the app versions that are compatible with the currently supported Business Central versions is free of charge. For more information, read Product Lifecycle Policy.

Support Channels

Each IT.integro application has a dedicated product team to provide support for the application. If you already are an IT.integro partner who signed the partnership agreement, you can submit a service desk ticket for the Bonuses & Accruals by means of:

- Jira Portal available for IT.integro partners,
- sending a message to an e-mail address published on the relevant page on the IT.integro Product Portal available for IT.integro partners.

Frequently Asked Questions

In this section, you can find answers to frequently asked questions about the Bonuses & Accruals application and Bonuses & Accruals Extension PL.

Is Bonuses & Accruals available in my country/region?

Bonuses & Accruals is available in all the countries. The following languages are supported:

- English (United States) and
- Polish (Poland).

How do I get Bonuses & Accruals?

IT.integro offers its applications through a partner network. Contact your Business Central partner to get Bonuses & Accruals or start with a free trial.

For more information about the free trial version, see Try.

How to become an IT.integro partner to provide the app to my customers?

If you are interested in becoming an IT.integro partner and app reseller, read Become an IT.integro Partner. Partners are granted access to the Product Portal where they can find new app versions and all information about the app. For more information, read Product Portal for Partners.

How do I get technical support for Bonuses & Accruals?

Bonuses & Accruals is sold to end users through partners who are responsible for the deployment process and support of the application under the partnership agreement with IT.integro.

To get help with any technical issues you encounter, contact your reselling partner. If your Business Central partner is not able to provide any resolution to the issue, they will submit a service ticket to IT.integro.

Business Functionality

The core of the functionality is available within Bonuses & Accruals.

However, the application can be easily extended with additional features to meet local requirements for processing various types of bonuses granted for sales and purchase transactions including rebates and discounts.

The Bonuses & Accruals Extension PL application ensures that bonus settlement documents processed in Business Central are compliant with Polish legal requirements.

> **ⓘ TIP**
>
> Should you require any local features to process and settle discounts and rebates in Business Central in compliance with requirements binding in your country, contact our team at appsales@it.integro.pl.

TO	SEE
Find out how to configure the application to calculate and settle sales and purchase bonuses	Bonuses & Accruals Functionality
Understand how to meet Polish legal requirements when calculating and settling the retrospective discounts (rebates)	Bonuses & Accruals Extension PL

> **☞ IMPORTANT**
>
> For more information about Bonuses & Accruals, see Application Roadmap.

See Also

Bonuses & Accruals documentation in English

Installation and Registration

Contact IT.integro for support

Application Roadmap

Bonuses & Accruals Functionality

Bonuses & Accruals application extends the discount functionality available in Microsoft Dynamics 365 Business Central. This article describes the functionalities available in the application and provides the guidelines on how to use them.

TO	SEE
Prepare a general configuration of the application	Bonuses & Accruals Setup
Understand how to define different types of bonuses and how bonuses can be calculated	Bonus Type
Set up a new bonus contract for the sales transactions and understand the conditions for bonus amounts calculation	Bonus Card
Understand how bonus entries are created and how they are described for different types of operations	Bonus Entries
Learn how to use accruals and what consequences appear in the ledgers, if accruals are calculated and posted	Accruals
Learn how to settle and finalize the bonus contract	Settlement
Define rules for recurring bonuses	Recurring Bonuses
Learn how to archive bonus cards	Archiving Bonuses
Automate application with job queues	Job Queue automation
Find out how to batch process bonus cards	Batch Processing Bonuses

☞ **IMPORTANT**

For more information about Bonuses & Accruals, see Application Roadmap.

See Also

Bonuses & Accruals documentation in English

Installation and Registration

Contact IT.integro for support

Bonuses&Accruals on App Source

Application Roadmap

General Settings

Find out the necessery setup for the Bonuses & Accruals application.

TO	SEE
Prepare a general configuration for the application	Bonuses & Accruals Setup
Configure source codes for registered bonus transactions	Bonus Source Code
Set up a new bonus posting group for accruals posting	Bonus Posting Group

Bonuses & Accruals Setup

Bonus & Accruals Setup allows you to set up a number series. It also contains an optional job queue automation setup (see Job Queue Setup).

1. Choose the 🔎, enter **Bonuses & Accruals Setup**, and then choose the related link.
2. The **Bonuses & Accruals Setup** page contains the following fields:
   - **Calculate with Job Queue** - Specifies if the job queue is used to calculate bonuses.
   - **Post Accrual with Job Queue** - Specifies if the job queue is used to post accruals for bonuses.
   - **Bonus Nos.** - Specifies the numbering series used for bonus cards.
   - **Bonus Contract Nos.** - Specifies the numbering series used for bonus contracts.

Bonus Source Code

A unique source code must be set up to mark bonus accrual postings. Assigning a unique source code to a bonus ensures the correctness of bonus calculation as it prevents bonus from including source ledger entries which are created as a result of bonus accruals posting.

> ⚠ **CAUTION**
>
> A unique source code should also be used for the cost adjustment process. The default source code setup for standard operations works fine.

To create a source code

1. Choose the 🔍, enter **Source Codes**, and then choose the related link.
2. Choose **New** to add a new source code.
3. Choose the 🔍, enter **Source Code Setup**, and then choose the related link.
4. On the **Bonus** FastTab fill in the **Bonus** field.

Bonus Posting Group

It is required to set up a bonus posting group if you plan to use the accruals functionality.

To create a bonus posting group

1. Choose the ⊕ icon, enter **Bonus Posting Group**, and then choose the related link.
2. Choose **New** to add a new record.
3. Fill in the following fields:
   - **Code** - Specifies the unique identifier of a bonus posting group.
   - **Description** - Specifies a description of a bonus posting group.
   - **G/L Cost/Revenue Account No.** - Specifies an income statement G/L account used for cost or revenue posting when the accruals functionality is enabled.
   - **G/L Accrual Account No.** - Specifies a balance sheet G/L account used for posting the accrued amount when the accruals functionality is enabled.
   - **Accrual Charge (Item)** - Specifies an item charge which can be used for accrual posting to adjust item ledger entries in order to provide the correct sales amount and margin for the sales transaction. The field is optional.

Bonus Type

A bonus type is a template that contains default parameters for new bonus cards. You can set up unlimited number of bonus types.

To set up a bonus type

1. Choose the 🔍 icon, enter **Bonus Types**, and then choose the related link.
2. Choose **New** to add a new bonus type.
3. On the **Bonus Type** card fill in the fields:
   - **Code** - Specifies the bonus type code.
   - **Description** - Specifies the description of the bonus type.
   - **Sales/Purchase** - Specifies if the bonus is meant for sales or purchase transactions. Based on the value in this field, the values in **Settle per** and **Settlement Document** are adjusted.
   - **Recurring** - Specifies if the bonus is planned to be maintained as the recurring bonus. For more information see, Recurring Bonuses.
   - **Recurring Frequency Starting Date** - Specifies the date formula to be used to calculate the starting date for a new recurring bonus. For more information, see Recurring Bonuses.
   - **Recurring Frequency Ending Date** - Specifies the date formula to be used to calculate the ending date for a new recurring bonus. (or more information, see Recurring Bonuses.
   - **Calculation Base** - Specifies a base to be used to calculate a bonus. The following options are available: **Amount**, **Quantity**.
   - **Calculation Method** - Specifies a method to be used to calculate a bonus. The following options are available: **Percentage**, **Fixed Amount**, **User-Defined**.
   - **Threshold Selection** - Specifies the threshold type to be used. The following options are available: **Highest**, **Progressive**.

> 👉 **IMPORTANT**
>
> Bonuses can be calculated using various approaches that depend on the values set in the **Calculation Type**, **Calculation Method**, and **Threshold Selection** fields. For more information, see Bonus Calculation Settings.

- **Exclude Discounts** - Specifies that the discounts applied on sales documents are to be excluded from bonus amount calculation.
- **Include Bonus Settlements** - Specifies if the entries created with the bonus settlement documents are included in the bonus calculation. This feature works, if the settlement line is of the **G/L Account** type and a G/L account is specified in the source assets.
- **Bonus Posting Group** - Specifies the posting group which defines how accruals should be posted in the general ledger and item ledger. For more information see, Bonus Posting Group.
- **Post Accruals** - Specifies if accruals are posted to the general ledger when creating bonus entries (calculating bonus amounts). For more information see, Accruals.
- **Post Accruals to Inventory** - Specifies if accruals are posted to the item ledger (by creating value entries) when creating bonus entries (calculating bonus amounts). (or more information see, Accruals.
- **Settle per** - Specifies how bonus entries are grouped for the bonus settlement.
- **Group Settlement Lines** - Specifies how settlement document lines are aggregated on the bonus settlement document. The following options are available: **Dimension Set ID & VAT Prod. Posting Group** or **Single Line**.
- **Settlement Document Type** - Specifies if the settlement document should be a sales credit memo or purchase invoice for a sales bonus, or a purchase credit memo or sales invoice for a purchase bonus.
- **Settlement Document Line Type** - Specifies the document line type used for the bonus settlement document. The following options are available:: **G/L Account**, **Resource**, **Charge (Item)**. When using **Charge (Item)**, the amount will be allocated automatically.
- **Settlement Document Line No. Source** - Specifies the G/L account number, resource number or item charge number used for a bonus settlement document and it depends on the settlement document line type.

- **Settlement Document Line Description** - Specifies the default description for the settlement document line.
- **Max. No. of Settlement Lines** - Specifies the maximum number of settlement lines. If the number is exceeded, a new settlement document is created. The blank value indicates no limit.

> **ⓘ NOTE**
>
> To automatically insert related values in the resulting settlement document line description, enter the following placeholders in the **Text** field. %1 - **Starting Date**, %2 - **Ending Date**, %3 - **Bonus No.**

Bonus Calculation Settings

The following matrix describes all the possible combinations of the bonus calculation settings which can be set up on the **Bonus Type Card** page.

CALCULATION TYPE	CALCULATION METHOD	THRESHOLD SELECTION	DESCRIPTION
Amount	Percentage	Progressive	A percentage of the transaction source amount where thresholds are defined based on the total source amount in the bonus base period and the bonus amount grows progressively between the thresholds.
Quantity	Percentage	Progressive	A percentage of the transaction source amount where thresholds are defined based on the total source quantity in the bonus base period and the bonus amount grows progressively between the thresholds.
Amount	Fixed Amount	Progressive	This combination is not supported.
Quantity	Fixed Amount	Progressive	A fixed amount where thresholds are defined based on the total source quantity in the bonus base period and the bonus amount grows progressively between thresholds.
Amount	Percentage	Highest	A percentage of the transaction source amount where thresholds are defined based on the total source amount in the bonus base period and the bonus amount is calculated for the highest threshold.
Quantity	Percentage	Highest	A percentage of the transaction source amount where thresholds are defined based on the total source quantity in the bonus base period and the bonus amount is calculated for the highest threshold.
Amount	Fixed Amount	Highest	This combination is not supported.
Quantity	Fixed Amount	Highest	A fixed amount where thresholds are defined based on the total source quantity in the bonus base period and the bonus amount is calculated for the highest threshold.
-	User-Defined	-	The **User-Defined** calculation method is a feature that allows the user to assign the bonus amount specified by the user to individual item-based source lines in source documents.

Creating a Bonus Card

The bonus card is used to define the main terms and conditions of a discount to be granted to a specific customer, vendor, or group during a selected period. It defines how the bonus amounts are calculated. There are two types of bonus cards:

- The purchase bonus card that is designed for calculating bonuses based on purchase transactions. By accessing the **Purchase Bonus Card** page, you can set up and configure purchase-related bonuses. To keep track of these bonuses, refer to the **Purchase Bonus List** page which provides a comprehensive overview of all purchase-related bonuses.
- The sales bonus card that is specifically tailored for calculating bonuses derived from sales transactions. Utilize the **Sales Bonus Card** page to configure and manage sales-related bonuses. For a consolidated view of these bonuses, navigate to the **Sales Bonus List** page.

To create a bonus card

1. Choose the 🔍 icon, enter **Sales Bonus List** or **Purchase Bonus List**, and then choose the related link.
2. Choose **New** to add a new bonus card.
3. Fill in the fields as necessary. Hover over a field to read a short description.
4. Choose the **Release** action to activate the bonus.

> **ℹ NOTE**
>
> When releasing a bonus card, the system is taking into account already posted transactions (if they fulfill the bonus criteria that were set).

General Data & Calculation

A bonus period is defined on the **General** FastTab with the **Starting Date** and **Ending Date** fields. Practically, the **Posting Date** filter is applied on source ledger entries. Only transactions within the bonus period are included while creating bonus entries.

A bonus base period is defined on the **Calculation** FastTab with the **Base Starting Date** and **Base Ending Date** fields. It also works as a **Posting Date** filter applied on source ledger entries. However, the transactions which qualify result in bonus base entries. The **Base Value** field on the bonus card displays the current sum of bonus base entries. The bonus base value is used to determine which threshold should be used during bonus calculation. The base bonus period defaults to the bonus period.

- **No.** - Specifies the number of the bonus card, assigned manually or with the number series.

- **Description** - Specifies the description of the bonus.

- **Bonus Type** - Specifies the type of the bonus which determines the bonus settings.

    On the **Sales Bonus Card** page

    - **Sales Type** - Specifies the recipient for which the bonus is calculated. The following options are possible: **Sell-to Customer**, **Bill-To Customer**, **Customer Disc. Group**, **Customer Bonus Group**, **Campaign**, **All Customers**.
    - **Sales Code** - Specifies the recipient of the bonus specified in the **Sales Type** field.

    On the **Purchase Bonus Card** page

    - **Purchase Type** - Specifies the recipient for whom the bonus is calculated in the case of the purchase bonus type. The following options are possible: **Buy-from Vendor**, **Pay-to Vendor**, **Vendor Bonus Group**, **All Vendors**.
    - **Purchase Code** - Specifies the recipient of the bonus specified in the **Purchase Type** field.

- **Starting Date** - Specifies a starting date of the bonus.

- **Ending Date** - Specifies an ending date of the bonus.

- **Closing Date** - Specifies a closing date of the bonus (as the default set as the ending date).

- **User ID** - Specifies the user assigned to the bonus card.

- **Last DateTime Modified** - Specifies the last date and time of a bonus card modification.

- **Base Starting Date** - Specifies a bonus base starting date.

- **Base Ending Date** - Specifies a bonus base ending date.

- **Calculation Base** - The value is copied depending on a bonus type and it is not editable.

- **Calculation Method** - The value is copied depending on a bonus type and it is not editable.

- **Threshold Selection** - The value is copied depending on a bonus type and it is not editable.

- **Bonus/Threshold Currency Code** - Specifies the currency used with the amounts defined for the bonus/threshold. No matter what currency is used in a source transaction, it is converted to the bonus/threshold currency as well as general ledger currency (for the purpose of accrual posting).

- **Threshold Unit of Measure** - Specifies the unit of measure used with the threshold. The field is editable, if the **Quantity** calculation method is used. The unit of measure must be defined for all items within a bonus source asset set.

Thresholds

You can define an unlimited number of thresholds for one or multiple source asset sets within a single bonus card. They must be set in the ascending order. Each source asset set has its own thresholds that are used in combination with the total base value specific to that source asset set, to calculate a bonus amount for bonus entries. Consequently, fields on the **Statistics** FastTab display the total base value and total bonus amount that is a sum from all specified source asset sets.

- **Source Asset Set Code** - Specifies a set of the assets to be included in the bonus calculation. A source asset set can be defined for items, G/L accounts, and, in the case of sales bonuses, also for resources, and filtered as needed.

> **ⓘ NOTE**
>
> If multiple thresholds can be applied to a transaction, the bonus amount is calculated according to the **Threshold Selection** field.

Accruals

> **ⓘ NOTE**
>
> For more information about the accruals functionality, see Bonus Accruals.

Post Accruals to G/L - Specifies that accruals for calculated bonus amounts are posted to general ledger, if the field is selected when releasing the bonus card or posting new transaction within bonus period. **Accrual Reversal Date** - Specifies date of accrual reversal. When closing the bonus, accruals are reversed. By default, the system reverses accruals on the bonus closing date. Alternatively, the date can be changed to reverse the accruals on the source document date.

Settlement

In certain scenarios (i.e. commissions), providing the settlement customer or vendor is required directly on the Bonus Card.

Settle-with Type - Specifies the type of the settlement document recipient. **Settle-with No.** - Specifies the settlement document recipient.

Notes, Links, Comments and Attachments

You can add **Notes**, **Links**, **Comments** and **Attachments** to the bonus card. This also applies to the archived bonus card.

Customer/Vendor Bonus List

The user can show all bonuses related to the customer/vendor. The action is available on the **Customer/Vendor** card pages and **Customers/Vendors** list pages.

To show the customer/vendor bonus list

1. Choose the 🔍 icon, enter **Customers** or **Vendors**.
2. Choose the **Customer** or **Vendor** tab and the **Bonuses** action to show the bonus list.
3. Choose **Show Bonus** to open the bonus card.

Bonus Card Lifecycle

1. The bonus card is created.
2. The bonus card is released. As a result, bonus entries are created with values in the **Base Value** and **Total Bonus Amount** fields. Optionally, accruals are posted.
3. The bonus card is closed and the settlement document is created. Accruals are reversed (if posted). A new bonus card is created if the bonus was marked as **Recurring**.
4. The bonus card is archived and the bonus card is deleted and an archived bonus card is created.

Understanding Bonus Entries

The Bonuses & Accruals application starts creating bonus entries and detailed bonus entries for all transactions that match the criteria after the bonus card is released.

To see bonus entries

1. Choose the 🔍 icon, enter **Sales Bonus List** or **Purchase Bonus List**, and then choose the related link.
2. Open a bonus card.
3. Choose the **Bonus Entries** action on the **Related** ribbon tab.

Bonus Entry

Bonus entries are created for source ledger entries (item ledger entries, general ledger entries, resource ledger entries). One source ledger entry results in one bonus entry. The application processes bonus entries in the following steps:

1. A bonus entry is created. The purpose is to register a source ledger entry with the amounts in the general ledger, transaction and threshold currency.
2. A bonus entry is calculated. The application creates one detailed bonus entry of the **Initial Entry** type for each respective threshold and fills a value in the **Bonus Amount** field. If accruals are set to be posted, the application also creates one detailed bonus entry per accrual type (entry types: **G/L Accrual**, **Inventory Accrual**) and fills a value in the **Accrual Amount (LCY)** field.
3. A bonus accrual is posted. The application checks if any detailed bonus entries of the **G/L Accrual** or **Inventory Accrual** type exist, and updates the **Accrual Amount Posted (LCY)** field with the posted amount.

> ℹ **NOTE**
>
> The application allows calculating bonus entries and posting accruals by using the job queue (for more information, see Job Queue Setup).

Excluding Selected Bonus Entries

Bonus entries can be excluded or included back in the bonus.

> ℹ **NOTE**
>
> In certain circumstances the recalculation of selected entries may require the recalculation of the entire bonus card. It means reversing the accruals for the bonus, deleting its entries and recreating them. Users are asked for confirmation before the operation.

To exclude one or more bonus entries

1. Choose the 🔍 icon, enter **Sales Bonus List** or **Purchase Bonus List**, and then choose the related link.
2. Open a bonus card.
3. Choose the **Bonus Entries** action on the **Related** ribbon tab.
4. Select one or more entries and choose the **Exclude/Include...** action.
5. Select the **Exclude** value in the **Recalculation Request** column for each entry to be excluded.
6. Select the **Process** action to complete the recalculation.

Bonus Card Closing

If a bonus card is set to post accruals, accruals are reversed during the closing procedure (or after the settlement if it is required for the bonus). Detailed bonus entries of the **G/L Accrual** or **Inventory Accrual** type are created with **Accrual Amount (LCY)** field filled in. The application posts the accrual reversal and updates the detailed entries. **Accrual Amount Posted (LCY)** field with the posted amount.

Bonus Card Archiving

After a bonus card is archived, the entries are still stored. They are now linked to the archived bonus card, because the bonus number is not changed during the archiving procedure.

Bonus Accruals

Bonus amounts can be accrued in the general ledger and optionally, the item ledger. Although posting accruals is not mandatory (it depends on bonus type setup), it allows you to temporarily reflect future liabilities in your accounts until a settlement document is issued.

To set up general ledger accruals posting

1. Choose the 🔍 icon, enter **Bonus Types**, and then choose the related link.
2. Choose **New** to add a new bonus type.
3. Make sure the **Post Accruals** field is selected.
4. Make sure there is a value in the **Bonus Posting Group** field.
5. After looking up the bonus posting group, make sure the **G/L Cost/Revenue Account** and **G/L Accrual Account** fields contain values.

To set up general ledger and inventory accruals posting

1. Choose the 🔍 icon, enter **Bonus Types**, and then choose the related link.
2. Choose **New** to add a new bonus type.
3. Make sure the **Post Accruals** and **Post Accruals to Inventory** fields are set to **True**.
4. Make sure there is a value in the **Bonus Posting Group** field.
5. After looking up the bonus posting group, make sure the **G/L Cost/Revenue Account**, **G/L Accrual Account** and **Accrual Charge (Item)** fields contain values.

> ☞ **IMPORTANT**
>
> Purchase bonuses cannot be accrued in the item ledger.

Posting Accruals

Accruals can be posted after a source ledger entry is created (by default) or according to a schedule with a job queue (For more information, see Job Queue Setup). The accruals are reversed during the bonus card closing procedure.

Dimensions

An accrual for a bonus entry is posted with the dimensions of the source ledger entry.

Source Code

An accrual for a bonus entry is posted with a source code defined on the **Source Code Setup** page for the bonus.

Posting Date

An accrual for a bonus entry is posted with the posting date of the source ledger entry. An accrual reversal is posted with the date selected in the **Accrual Reversal Date** set on the **Bonus Card** page.

> ❶ **NOTE**

When posting accruals for inventory, the posting date is set by using the **Adjust Cost-Item Entries** batch job approach.

Bonus Settlement

You can finalize the bonus with a settlement document. It can be a sales credit memo or a purchase invoice for a sales bonus, or a purchase credit memo or a sales invoice for a purchase bonus. You can also print the bonus summary with the listed source documents used for bonus calculation.

To settle a released bonus

The settlement document can be created as a result of the bonus closing procedure.

1. Choose the icon, enter **Sales Bonus List** or **Purchase Bonus List**, and then choose the related link
2. Open a released bonus card.
3. Choose the **Close & Settle...** action.
4. Update the **Closing Date** field, if necessary and select the **Settle** field.
5. Confirm that you want to open the settlement document card. The settlement document depends on the option that is selected on the Bonus Type Card page in the Sales/Purchase field for the bonus. The following documents are used for bonus settlement:

- a sales credit memo or purchase invoice for a sales bonus, or
- a purchase credit memo or a sales invoice for a purchase bonus.

To settle a closed bonus

The settlement document can be created for a closed bonus on demand. You can create a settlement document both for sales and purchase bonuses.

1. Choose the icon, enter **Sales Bonus List** or **Purchase Bonus List**, and then choose the related link
2. Open a closed bonus card.
3. Choose the **Close & Settle...** action.
4. Select the **Settle** field.
5. Confirm that you want to open the settlement document card. The settlement document depends on the option that is selected on the **Bonus Type Card** page in the **Sales/Purchase** field for the bonus. The following documents are used for bonus settlement:

- a sales credit memo or purchase invoice for a sales bonus, or
- a purchase credit memo or a sales invoice for a purchase bonus.

To print a bonus summary

A bonus summary printout can be issued from a sales credit memo, a posted sales credit memo, a purchase invoice, a posted purchase invoice, a purchase credit memo, a posted purchase credit memo, a sales invoice, and a posted sales invoice page.

1. Choose the action, enter **Sales Credit Memos**, and then choose the related link
2. Open a sales credit memo card.
3. Go to **Reports** and run the **Bonus Summary...** action.
4. Choose the **Print** or **Preview & Close** action to process the report.

> ⚠ **CAUTION**
>
> The Bonuses & Accruals application allows you to re-create the settlement document from closed bonus card. The user is informed if the settlement document already exists.

Recurring Bonuses

The recurring bonus functionality can be enabled on the **Bonus Type** page. It allows you to automate the process of bonus card creation after closing current bonus cards. You can define the frequency for starting and ending dates for new bonuses by setting up required date formulas. The recurring bonus functionality is useful for companies which grant bonuses for multiple customers frequently. The maintenance of bonus cards is facilitated by batch processing actions.

See Also

Bonus Type

Batch Processing Bonuses

Bonus Contract

Bonus Archiving

Bonuses with the **Closed** status can be archived. After archiving the bonus card cannot be changed anymore. Archiving a bonus card is irreversible.

To archive a closed sales bonus

1. Choose the 🔍 icon, enter **Sales Bonus List**, and then choose the related link.
2. Search for a bonus with the **Closed** status.
3. Choose the **Edit** action to open the **Sales Bonus Card** page.
4. Choose the **Archive** action and confirm the operation.
5. Choose the 🔍 icon, enter **Archived Sales Bonuses**, and then choose the related link.
6. Review the archived bonus card.

To archive a closed purchase bonus

1. Choose the 🔍 icon, enter **Purchase Bonus List**, and then choose the related link.
2. Search for a bonus with the **Closed** status.
3. Choose the **Edit** action to open the **Purchase Bonus Card** page.
4. Choose the **Archive** action and confirm the operation.
5. Choose the 🔍 icon, enter **Archived Purchase Bonuses**, and then choose the related link.
6. Review the archived bonus card.

> ☞ **IMPORTANT**
>
> Bonuses created based on a bonus contract can be archived only by archiving the bonus contract.

Job Queue Setup

For implementation with a large number of transactions and bonus cards definitions, it might be useful to run bonus calculations after working hours in order not to overload the Business Central application. Bonuses & Accruals application gives the possibility to set up job queues to separate or postpone bonus calculation or accruals postings. The job queue should use the 20021001 **Bonus Background Processing** report.

There are two fields that support job queues on the **Bonuses & Accruals Setup** page:

- **Calculate using Job Queue** - Specifies that the system will create bonus entries but will not calculate bonus amounts according to the thresholds. Bonus amounts will be calculated and bonus entries will be updated after running the job queue.
- **Post Accruals using Job Queue** - Specifies that the system will not post accruals (neither general ledger accruals nor inventory accruals) automatically when creating bonus entries but using dedicated job queue.

See Also

Bonuses & Accruals Setup

Bonus Batch Processing

If a company uses a large number of bonus cards, it is useful to use batch processing procedures for bonuses. The following actions in the **Process** group on **Bonus List** page can be used for handling batch processing:

- **Batch Release** - Runs the release procedure for all requested bonus cards.
- **Batch Close** - Runs the closing procedure for all requested bonus cards. It enables you to overwrite the **Closing Date** field value for a bonus. Settlement documents can also be created with this action after you select the **Settle** field on the report request page.
- **Batch Archive** - Runs the archiving procedure for all requested bonus cards.
- **Batch Create** - Creates multiple copies of the bonus for the selected customers/vendors.

Local Functionality for Poland

Local functionality for Poland has been provided as a separate application - Bonuses & Accruals Extension PL that extends the Bonuses & Accruals base application.

> **👉 IMPORTANT**
>
> Bonuses & Accruals Extension PL requires both Bonuses & Accruals and Polish Localization applications installed.

Bonuses & Accruals Extension PL is an extension of Bonuses & Accruals and it provides compliance with the Polish National System of e-Invoices (KSeF) for processing bonus settlement documents. To create bonus sales credit memos, the application utilizes the **Sales Correction Wizard**, a feature available within the Polish Localization application for Business Central. For more information, see Sales Correction Wizard in the Polish Localization documentation.

Additionally, in order to ensure compatibility, the application provides an alternative method for assigning the corrections of the originally posted sales invoices to the right bonus period.

> **👉 IMPORTANT**
>
> Since the Polish National System of e-Invoices requires that invoice corrections should be issued with the corrected document link, the bonus settlement document should not be considered as a standalone rebate for a period, but as a regular correction of one or more invoices.

Setting up Bonuses & Accruals Extension PL

Bonuses & Accruals Extension PL utilizes the general setup features available within the Bonuses & Accruals base application.

Bonus Type

To provide compliance of a bonus settlement document with the Polish National System of e-Invoices, you need to create a dedicated bonus type.

1. Choose the 🔍 icon, enter **Bonus Types**, and then choose the related link.

2. Choose **New** to add a new bonus type.

3. The following fields are already filled in with default values in compliance with the requirements of the Polish National System of e-Invoices:

   - **Correction Bonus** - Specifies how corrections are placed within the bonus period. The default value provided by Bonuses & Accruals Extension PL is **Linked to Invoice**. With this setting, the source entry is assigned to a bonus period based on the the corrected document posting date.

   - **Group Settlement Lines** - Specifies how settlement document lines are created. The default value set in Bonuses & Accruals Extension PL is **Line Wizard**. With this setting, correction lines are created by using the sales correction wizard available within the Polish Localization application.

   - **Max. No. of Settlement Lines** - Specifies the maximum number of settlement lines. If the maximum number is exceeded, a new settlement document is created. The blank value indicates no limit. The default value set in Bonuses & Accruals Extension PL is 5000.
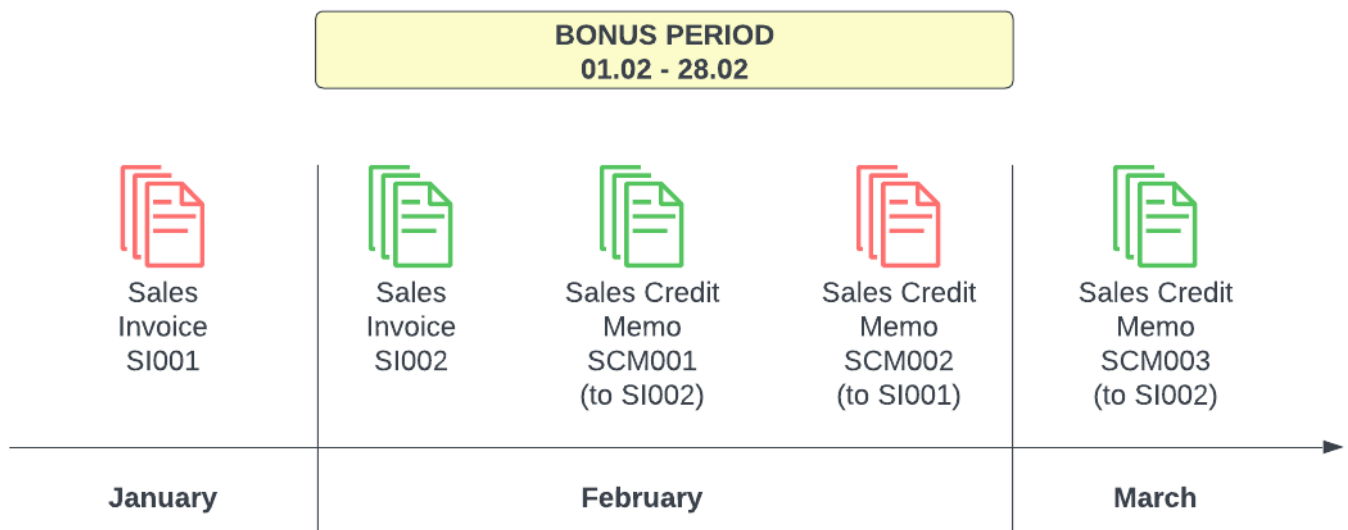
> **ℹ️ NOTE**

4. Fill in the following field:

   - **Sales Correction Reason** - Specifies the correction reason used by bonus settlement documents. The correction type must be set to **Discount**.

5. Make sure the **Settle Per** field value refers to **Source Currency**, because the settlements must be made in source transaction currencies.

Understanding the Bonus Linked to Invoice Correction

Until the bonus card is open, all sales credit memos posted (even outside the bonus period) are included in the bonus amount calculation. However, credit memos are included only if they are linked to the sales invoice from the bonus period. The following picture illustrates how the sales credit memos are linked to the corrected invoice, taking into account the posting period.

January: The bonus card has already been closed. Therefore, only sales invoice no. SI001 was included in the bonus amount calculation. As the bonus card is already closed, sales credit memo SCM002 (which corrects sales invoice no. SI001) was included.

February: The bonus card has not been closed. Therefore, sales invoice no. SI002 was included in the bonus amount calculation. In the same bonus period, sales credit memo no. SCM001 was posted. Sales credit memo no. SCM001 corrects sales invoice SI002, so it decreases the bonus amount. SCM002 (which corrects SI001) does not have any impact on the bonus calculation in February. Moreover, SCM003 (which corrects SI002) that was posted in March also decreases the bonus amount.

Collective Correction Invoice

The Bonuses & Accruals Extension PL application supports the creation of a collective correction invoice that enables you to process multiple sales invoices with a bonus calculated per period. To create a collective correction invoice:

1. Create a sales bonus card and select the customer with invoices to be corrected.
2. In the **Starting Date** and **Ending Date** fields, define the period from which the sales invoices should be collected.
3. In the **Code** field, select the bonus type code which has been set up for Bonuses & Accruals Extension PL.
4. In the **Source Asset Set Code** field, select a code to limit the source entries for which the bonus is to be calculated.
5. Set up a single threshold with no starting amount and required correction percentage.
6. Choose the **Release** action to release the sales bonus card.

7. Review the bonus entries and use the **Exclude/Include** action to decide which documents should not be corrected.
8. Close and settle the bonus. For more information, read Bonus Settlement.

As the result, the system will create a sales credit memo document to correct all the sales invoices issued within the period with the specified percentage. Such a document will be created according to the requirements of the Polish National System of e-Invoices. Each line of the sales credit memo will contain a reference to the original sales invoice.

See Also

Polish Localization

Bonus Card

Bonus Type

Sales Correction Wizard

Administration and Installation

In this article, you will find information about Bonuses & Accruals administration and installation.

TO	SEE
Learn more about system requirements	System Requirements
Get to know how to install the application	Installation and Registration

See Also

Technical Support - Contact IT.integro or your Business Central partner

Product Lifecycle Policy

Release Notes

System Requirements

System requirements for Bonuses & Accruals are the same as for Business Central Microsoft Dynamics 365 on-premises and online. The requirements for Microsoft Dynamics 365 Business Central online have been described in System Requirements for Dynamics 365 Business Central.

See Also

Installation and Registration

Installation and Registration

This article describes the prerequisites and installation and registration steps for Bonuses & Accruals or Bonuses & Accruals Extension PL in Business Central online and on-premises.

> ☞ **IMPORTANT**
>
> Polish Localization and Bonuses & Accruals applications must be installed before Bonuses & Accruals Extension PL.

Installing the Application for Business Central Online

To install the Bonuses & Accruals application for Business Central online perform the following steps:

1. On the AppSource offer page, select **Free Trial**.
2. Choose the environment on which you would like to install the app (sandbox/ or production).
3. Press install.

> ⚠ **CAUTION**
>
> Follow the similar steps for the Bonuses & Accruals Extension PL application. On AppSource offer page, select **Get it now**.

Installing the Application for Business Central On-Premises

To install applications for Business Central on-premises perform the following steps:

1. Download the installation files from the IT.integro Product Portal.

> ☞ **IMPORTANT**
>
> The IT.integro Product Portal can be accessed only by authorized IT.integro partners.

> ⚠ **CAUTION**
>
> When installing the application, you have to be assisted by an authorized IT.integro partner.

1. Run Dynamics NAV Administration Shell as an administrator.

2. To publish the application run the command:

```
Publish-NAVApp -ServerInstance YourDynamicsNAVServer -Path ".\\IntegroBonusApp.app"
```

3. To synchronize the application run the command:

```
Sync-NAVApp -ServerInstance YourDynamicsNAVServer -Name "App Name" -Version VersionNo. -Tenant [Tenant1, Tenant 2, default]
```

> ℹ **TIP**

The **Tenant** parameter can be skipped for a single-tenant instance or set as *default*. For multi-tenant instances, each tenant to be synchronized has to be listed.

4. To install the application run the command:

```
Install-NAVApp -ServerInstance YourDynamicsNAVServer -Name "App Name" -Tenant [Tenant1, Tenant2, default]
```

ⓘ TIP

It is recommended to install the latest application version available.

See Also

Technical Support - Contact IT.integro or your Business Central partner

System Requirements

Publishing and Installing an Extension

Sync-NAVApp

IT.integro's Product Lifecycle Policy for solutions (modules) created for Microsoft Dynamics NAV/Dynamics 365 Business Central

Due to the fact that all IT.integro solutions work only as add-on modules/extensions of the base system, i.e. Microsoft Dynamics NAV/ Dynamics 365 Business Central, they are subject to the same product lifecycle policy as the base system, i.e. Microsoft Dynamics NAV/ Dynamics 365 Business Central.

Classification of Changes in Product Versions

As part of product development and maintenance, IT.integro introduces the following changes to the offered modules:

- **New versions (change of the MAJOR type - when changes to the application elements are introduced as a result of breaking API compatibility)**

  - Application releases that adapt IT.integro products to the respective versions of the main system. The versions can be released for new "Cumulative Updates" (CU), fixes or full system versions, i.e. NAV 2018, Business Central 13 and 14. New versions may also add new functionalities to the modules, such as those listed hereinafter.

- **Functional extensions (change of the MINOR type - when a new functionality is introduced that is compatible with previous versions)**

  - New legally required functionalities - functions implemented within the system in order to adapt the system to legal requirements or to change the requirements. By definition, they should include functionalities explicitly required by law as applicable to ERP systems, but the definition may be extended to functionalities that support processes, the implementation of which, apart from the ERP system used, would be technically difficult.
  - New development functionalities - functions that improve work in the system, but are not required obligatorily by law. Their introduction is a result of feedback submitted by customers and project teams during implementation works at customers' and the result of technology development.

- **Fixes (change of the PATCH type - when the bug is fixed and the compatibility with previous versions is not broken)**

  - Application releases containing fixes to the existing functions of add-on modules or adaptation to the fixes implemented within the standard system version.

Support Cycles

For each product created by IT.integro (as an ISV partner - Independent Software Vendor) to the appropriate versions of the Microsoft Dynamics NAV/ Dynamics 365 Business Central system, fixes and new versions and functionalities are prepared during the standard product support period – in accordance with the definitions presented above. The support periods for individual full system versions are listed in the table.

VERSION NAME	RELEASE DATE	END-OF SUPPORT DATE FOR THE STANDARD SYSTEM VERSION
NAV 2016	3 January, 2016	13 April, 2021
NAV 2017	27 October, 2016	11 January, 2022

VERSION NAME	RELEASE DATE	END-OF SUPPORT DATE FOR THE STANDARD SYSTEM VERSION
NAV 2018	1 December, 2017	10 January, 2023
Dynamics 365 Business Central (BC 13)	1 October, 2018	14 April, 2020
Dynamics 365 Business Central on-premises Spring 2019 Update (BC 14)	1 April, 2019	10 October, 2023
Dynamics 365 Business Central on-premises 2019 Release Wave 2 (BC 15)	10 October, 2019	13 April, 2021
Dynamics 365 Business Central on-premises 2020 Release Wave 1 (BC 16)	01 April, 2020	12 October, 2021
Dynamics 365 Business Central on-premises 2020 Release Wave 2 (BC 17)	01 October, 2021	12 April, 2022
Dynamics 365 Business Central on-premises 2021 Release Wave 1 (BC 18)	1 April, 2021	12 October, 2022
Dynamics 365 Business Central on-premises 2021 Release Wave 2 (BC 19)	01 October, 2021	12 April, 2023
Dynamics 365 Business Central on-premises 2022 Release Wave 1 (BC 20)	01 April, 2022	12 October, 2023
Dynamics 365 Business Central on-premises 2022 Release Wave 2 (BC 21)	03 October, 2022	14 April, 2024
Dynamics 365 Business Central on-premises 2023 Release Wave 1 (BC 22)	03 April, 2023	13 October, 2024
Dynamics 365 Business Central on-premises 2023 Release Wave 2 (BC 23)	02 October, 2023	14 April, 2025
Dynamics 365 Business Central on-premises 2023 Release Wave 1 (BC 22)	03 April, 2023	13 October, 2024
Dynamics 365 Business Central on-premises 2023 Release Wave 2 (BC 23)	02 October, 2023	April 2025

Product Support Rules

1. Customers paying for the Enhancement Plan and partners are entitled to get a free download of new versions of individual products, legally required functionalities and fix packages during the periods listed in the table. Additional functionality extensions are also added to the new full versions of products. Such functionality extensions facilitate the use of solutions, but are not obligatory from a legal point of view. They are not prepared for lower versions that already operate on the market. For each perspective implementation of a new version within older versions, the project team will provide a cost estimate.

2. Customers who do not pay for the Enhancement Plan, will be charged for each modification or new version in accordance

with the price list for the respective version.

3. After the expiry of the standard support period for individual versions of the produced solutions, no new legally required functionalities or fix packages will be added to them. The technical feasibility of preparing and installing such fixes or new versions will be valued and assessed each time individually by the project team or partner.

4. Downgrade to earlier solution versions (not supported) for customers requesting for the downgrade is considered and evaluated on an individual basis and performed by project teams. Project teams take responsibility for preparing the "lower" version, checking its compatibility with the customer's system and installing it in the customer's system.

5. In accordance with the product life cycle policy developed by Microsoft and adopted by IT.integro for their ISV solutions, paying the Enhancement Plan fees after the expiry of the standard support period does not entitle customers to obtain new releases and fixes free of charge. On the other hand, the Enhancement Plan fee entitles the customer to download a newer version (compatible with the appropriate version of the main system) of a given product free of charge and install it within the Microsoft Dynamics NAV/ Dynamics 365 Business Central system in use. It is recommended for Customers to upgrade their software to the latest system versions.

6. Installation of new releases and fixes will be delivered as a paid service in compliance with the terms and conditions for the provision of services by IT.integro.

See Also

Contact IT.integro at appsales@it.integro.pl

Bonuses&Accruals on App Source

Software Lifecycle Policy and Dynamics 365 Business Central On-Premises Updates

Dynamics 365 Business Central on-premises (Modern Policy)

IT.intego applications for companies in Poland and global companies

IT.integro offer