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Fiscalization

The Fiscalization solution extends the functionality of Dynamics 365 Business Central with features for generating and issuing fiscal receipts for financial transactions. The solution supports an essential aspect of financial record-keeping, enabling the user to provide evidence for a completed transaction between the customer and vendor. The Fiscalization application enables the user to:

- set up different fiscal printers with specific protocols eg. Posnet or Thermal;
- set up connections between Dynamics 365 Business Central and fiscal printers;
- create fiscalization documents required in compliance with local legal regulations;
- create a fiscal receipt or fiscal receipt with an invoice based on a sales order;
- create a sales invoice based on a fiscal receipt;
- handle returns for fiscal receipts;
- assign VAT attributes to invoices created for fiscal receipts;
- create a collective statement of all selected fiscal receipts eg. for SAFT VAT purposes.

The Fiscalization solution consists of:

- Fiscalization Base App that provides the main setup functionality,
- the local fiscalization extension for Poland that ensures compliance with country-specific requirements.

IMPORTANT

With its flexibility, the Fiscalization solution can be extended to support local legal requirements not only in Poland, but also other countries. For more information, please contact IT.integro at appsales@it.integro.pl.

NOTE

The Fiscalization solution for Dynamics 365 Business Central® is available in both license models: cloud (online, SaaS) and on-premises (perpetual license and subscription).

The topics listed below have been described in this documentation.

Business Processes

- [Business Functionality](#)
 - [General Fiscalization Setup](#)
 - [Fiscalization Setup](#)
 - [Setting up a Fiscal Printer](#)
 - [Fiscalization for Poland](#)
 - [Creating a Fiscal Customer](#)
 - [Creating a Fiscal Receipt](#)
 - [Issuing Invoices for Fiscal Receipts](#)
 - [Correcting or Cancelling Fiscal Receipts](#)
 - [Suggesting a Fiscal Receipt Statement](#)

Administration and Installation

- [System Requirements](#)

- [Installation](#)
- [Upgrade](#)

Product Lifecycle Policy

- [Product Lifecycle Policy](#)

Business Central - Base Application

The Fiscalization application has been designed based on the technology and functionality of 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.

TIP

Documentation for Business Central, the base application, has been published on [IT.integro Docs](#).

Get Started with Fiscalization

To get started with Dynamics 365 Business Central and Fiscalization, contact IT.integro at appsales@it.integro.pl.

See Also

[Contact IT.integro](#)

[Fiscalization on the Microsoft AppSource marketplace](#)

[Application Roadmap](#)

[Policies for Product Documentation and Related Online Documents](#)

New and Planned

This article contains links to the roadmaps and releases of the applications that are available within the Fiscalization solution.

TO	SEE
See the roadmaps for all the applications	Roadmaps
Learn about new features and bugfixes	Releases

See Also

[Information about released new versions](#)

[Product Lifecycle Policy](#)

Fiscalization Roadmap

This article contains links to the articles that describe roadmaps of the applications that are available within the Fiscalization solution.

Each of the applications is released in a separate product release cycle according to its roadmap.

- [Fiscalization Base App](#)
- [Fiscalization Extension PL](#)

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 Fiscalization,
- technological changes and changes in the base application introduced by Microsoft, which have an impact on development works,
- technological and legal changes within dependency applications,
- demand reported by project teams and IT.integro partners,
- importance for the proper operation of the application in the context of related functionalities.

IMPORTANT

The rules for maintaining the compatibility of the applications that are available within Fiscalization with the Dynamics 365 Business Central have been described in the [Product Lifecycle Policy](#).

See Also

[Fiscalization Release Notes](#)

Fiscalization Base App Roadmap

This article presents the development plans for the Fiscalization Base App application.

The list below includes the 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 Fiscalization,
- 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 Fiscalization Base App with Dynamics 365 Business Central have been described in [Product Lifecycle Policy](#).

See Also

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

[Fiscalization on App Source](#)

[Policies for Product Documentation and Related Online Documents](#)

Fiscalization Extension PL Roadmap

This article presents the development plans for the Fiscalization Extension PL application.

The list below includes the 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 Fiscalization Extension PL,
- 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 Fiscalization Extension PL with Dynamics 365 Business Central have been described in [Product Lifecycle Policy](#).

See Also

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

[Fiscalization on the Microsoft AppSource marketplace](#)

[Policies for Product Documentation and Related Online Documents](#)

Fiscalization Releases

This article contains links to the articles that describe roadmaps and releases notes of the applications that are part of the Fiscalization solution.

- [Fiscalization Base App](#)
- [Fiscalization Extension PL](#)

NOTE

Each of the applications is released in a separate product release cycle according to its roadmap.

See Also

[Fiscalization Roadmap](#)

Releases

This article lists the released versions of Fiscalization Base App 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 Fiscalization Base App that is compatible with Microsoft Dynamics 365 Business Central version.

Versions

- [1.4.3](#)
- [1.4.2](#)

See Also

[Installation and Registration](#)

[Contact IT.integro for support at installation](#)

[Fiscalization on the Microsoft AppSource marketplace](#)

Releases

This article lists the released versions of Fiscalization 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 Fiscalization Extension PL that is compatible with Microsoft Dynamics 365 Business Central version.

Versions

- [1.1.1](#)
- [1.1.0](#)

See Also

[Installation and Registration](#)

[Contact IT.integro for support at installation](#)

[Fiscalization Extension PL on the Microsoft AppSource marketplace](#)

Business Functionality

The following topics lists the articles that describe the fiscalization functionality.

TO	SEE
Learn more about the functionality of the Fiscalization solution and the improvements added to Business Central	Fiscalization Functionality
Get to know the functionality that supports Polish legal requirements on fiscalization	Fiscalization for Poland

See Also

[Installation and Registration](#)

[Contact IT.integro for support](#)

[Fiscalization on the IT.integro.pl website](#)

[Fiscalization on the Microsoft AppSource marketplace](#)

[Application Roadmap](#)

General Fiscalization Setup

The Fiscalization application for Dynamics 365 Business Central offers flexible features for proper processing and recording of retail sales transactions and generating fiscal receipts. The following articles describe how to set up a basic fiscalization process and define the general settings to connect the application with Dynamics 365 Business Central and fiscal printers.

TO	SEE
Define application setup for main fiscalization processes in your organization	Fiscalization Setup
Set up a fiscal printer to use for fiscalization	Setting up a Fiscal Printer

See Also

[Installation and Registration](#)

[Contact IT.integro for support](#)

[Fiscalization on the Microsoft AppSource marketplace](#)

[Application Roadmap](#)


Fiscalization Setup

To manage fiscalization processes, first you must specify the rules and values that define the company's fiscalization policies.

On the **Fiscalization Setup** page, you can define the general settings of the Fiscalization application, including which fiscal printer you want to use and how new fiscal documents are posted based on number series. This general setup is typically performed only once during the initial implementation.

Setting up Fiscal Integration

To define data that is required to set up the fiscalization process in Dynamics 365 Business Central:

1. Choose the  icon, enter **Fiscalization Setup**, and then select a related link.
2. On the **Fiscalization Setup** page, fill in the following fields as described below:
 - **Default Fiscal Printer No.** - Specify the name of a default fiscal printer for fiscalization. For more information, see [Setting up a Fiscal Printer](#).
 - **Manual Fiscal Receipt** - Specifies how the fiscalization process will be performed. By default, the value is set to *false* and all fiscal documents are automatically printed by using the printer selected in the **Default Fiscal Printer No.** field after posting. If you change the field value to *true*, all fiscal documents have to be printed manually.
 - **Fiscal Receipt Nos.** - Specifies the number series for each fiscal receipt document. For more information, see [Create Number Series](#).
 - **Fiscal Receipt Return Nos.** - Specifies the number series for each fiscal receipt return document. For more information, see [Create Number Series](#).

See Also

[Create Number Series](#)


Setting up a Fiscal Printer

To create and post fiscal documents, you must configure the default fiscal printer you want to use for printing receipts within the integrated fiscalization process in Dynamics 365 Business Central.

You must define the general configuration settings for the fiscal printer, such as the number of the default fiscal printer, minimum and maximum length for printed text strings, VAT settings, fields to be displayed and included on print-outs, printer ports, protocols, ect. Then, you can add new fiscal printers that will be used within your system.

Creating a Fiscal Printer

The following procedure shows how to set a fiscal printer up for the fiscalization process.

1. Choose the  icon, enter **Fiscal Printers**, and then select a related link.
2. On the **Fiscal Printers** that is open, fill in the mandatory fields as described below:
 - **Fiscal Printer No.** - Specifies the number of the fiscal printer.
 - **Min. Name Length** - Specifies the minimum length of a printed string.
 - **Max. Name Length** - Specifies the maximum length of a printed string.
 - **VAT A** - Specifies the VAT A setting for VAT% that is used with this fiscal printer.
 - **VAT B** - Specifies the VAT B setting for VAT% that is used with this fiscal printer.
 - **VAT C** - Specifies the VAT C setting for VAT% that is used with this fiscal printer.
 - **VAT D** - Specifies the VAT D setting for VAT% that is used with this fiscal printer.
 - **VAT E** - Specifies the VAT E setting for VAT% that is used with this fiscal printer.
 - **VAT F** - Specifies the VAT F setting for VAT% that is used with this fiscal printer.
 - **VAT G** - Specifies the VAT G setting for VAT% that is used with this fiscal printer.
 - **VAT H** - Specifies the VAT H setting for VAT% that is used with this fiscal printer.

Fiscal Connector Settings

IMPORTANT

To set up a connection to your specific printer, contact IT.integro.

The following settings are included in the fiscal connector configuration that is provided as part of fiscal integration:

- **Unique No.** - Specifies the unique number of the fiscal printer operation.
- **Serial Port No.** - Specifies the serial port number for a fiscal printer connection.
- **Last Test Date** - Specifies the date of the last fiscal printer operation.
- **Last Test Result** - Specifies the status of the last fiscal printer operation. The following results can be displayed in the field:
 - **Correct** - Specifies the success status of fiscal printer.
 - **Failed** - Specifies the failed status of fiscal printer.

- **Fiscal Printer Protocol** - Specifies the protocol used for communication with a fiscal printer. The following options are available:
 - **Thermal**- A communication protocol between the fiscal printer and Dynamics 365 Business Central. This protocol is used by different printer producers like Novitus, Elzab, Posnet.
 - **Posnet** - A communication protocol between the fiscal printer and Dynamics 365 Business Central. This protocol is used by Posnet in newer version of the printers.
- **Cashier Identification** - Specifies the display name of Cashier on fiscal receipt.
 - **Cashier Code** - Specifies that fiscal receipt will be printed based on salesperson/purchaser code from posted document.
 - **Cashier Name** - Specifies that fiscal receipt will be printed based on salesperson/purchaser name from posted document.
- **No VAT A** - Ignore fiscal printer VAT A settings for VAT%.
- **No VAT B** - Ignore fiscal printer VAT B settings for VAT%.
- **No VAT C** - Ignore fiscal printer VAT C settings for VAT%.
- **No VAT D** - Ignore fiscal printer VAT D settings for VAT%.
- **No VAT E** - Ignore fiscal printer VAT E settings for VAT%.
- **No VAT F** - Ignore fiscal printer VAT F settings for VAT%.
- **No VAT G** - Ignore fiscal printer VAT G settings for VAT%.
- **No VAT H** - Ignore fiscal printer VAT H settings for VAT%.
- **No VAT Prod. Posting Group** - Specifies VAT Prod. Posting Group for fiscal printer.
- **Printer Connection Timeout** - Specifies the fiscal printer connection timeout after unsuccessful connection request.
- **Communication Parameter (ms)** - Specifies the timeout parameters for fiscal printer communication.
- **IP Address** - Specifies the IP Address for fiscal printer connection.
- **Port No.** - Specifies the port number for fiscal printer connection.
- **Connection Type** - Specifies the connection type for fiscal printer.
 - **Serial Port** - A communication interface that allows data to be transferred between devices through a serial connection.
 - **TCP/IP** - A communication protocol used to interconnect network devices on the internet. TCP/IP is also used as a communications protocol in private computer networks.
- **Print Advance Settlement** - Specifies that an advance settlement document is to be printed for the selected fiscal receipts.
- **RS232 Communication Speed** - Specifies the RS232 communication speed type for a fiscal printer, i.e. how many bits passed through the communication protocol per second. The following values are possible:
 - 9600,
 - 19200P,
 - 28800,
 - 38400,
 - 57600,
 - 115200
- **Print VAT Reg. No.** - Specifies, if VAT registration number from posted document is to be printed.

- **Use Local Network** - Specifies that a local network can be used for the fiscal printer connection.
- **Local Agent URI** - Specifies the local agent URI address for the fiscal printer connection.
- **Azure Service Bus Relay Setup ID** - Specifies the unique ID of Azure Service Bus Relay Setup for the fiscal printer connection.

Fiscalization for Poland

The requirements companies operating in Poland are obliged to meet in the scope of fiscalization have been stipulated in the [Polish VAT Act](#).

Local Functionality

The following articles describe the features that have been provided within Fiscalization Extension PL due to legal requirements on fiscalization that are binding in Poland.

TO	SEE
Set up a customer fiscal documents are to be created for	Creating a Fiscal Customer
Create and issue a fiscal receipt with all the data required for a specific customer	Creating a Fiscal Receipt
Create an invoice based on a fiscal receipt	Issuing an Invoice for a Fiscal Receipt
Perform an action on fiscal receipts to automatically create a credit memo and make corrections by either cancelling the fiscal receipt invoice or recreating it first	Correcting or Cancelling Fiscal Receipts
Use the function on the General Journal page to suggest fiscal receipt statements based on selected criteria, such as VAT period starting date, posting date, vat settlement date, starting document number for journal lines and summarize per period	Suggesting a Fiscal Receipt Statement

Polish Localization

The Fiscalization solution can be easily integrated with the Polish Localization application from IT.integro.

Polish Localization provides features that ensure compliance of the invoicing process in Dynamics 365 Business Central with Polish legal requirements.

See Also


[Polish Localization](#)

Creating a Fiscal Customer

To manage fiscalization processes for a specific customer, you can use the new setup field on the customer card. This field automates the creation of fiscal documents, posting routines, and reporting and ensures an accurate and efficient fiscalization processes.

Creating a Fiscal Customer

The following procedure describes how to create a fiscal customer in the sales area.

1. Choose the  icon, enter **Customers**, and then select a related link.
2. Create a new customer. For more information, see [Register New Customers](#).
3. On the **Invoicing** FastTab, in the **Fiscal Document Type** field specify the type of fiscalization to be used for all sales documents created for the customer. The following options can be selected in this field:
 - **Fiscal Receipt** - Specifies a fiscal receipt will be created for the sales order after its is posted.
 - **Fiscal Receipt with Invoice** - Specifies that a fiscal receipt with a fiscal receipt invoice will be created for the sales order after it is posted.

If the **Fiscal Document Type** field is empty on the customer card, fiscal documents are not created for this customer. If specify a fiscal document type, the **Prices Including VAT** field will be set to **true** automatically. This sets up a number series for newly created sales and fiscal documents. For more information, see [Fiscalization Setup](#).

4. When you have finished creating the new customer, choose **OK**.


Now, the customer is registered, and the customer card is ready to be used on sales documents.

Creating a Fiscal Receipt

Fiscal receipts serve as a record of financial transactions between a customer and vendor. They provide evidence that a transaction has taken place, including details such as the date, time, items purchased, prices, taxes, and any discounts or promotions applied. These records are essential for accurate accounting, financial reporting, and auditing purposes.

Creating a Fiscal Receipt from a Sales Order

The following procedure describes how to create a fiscal receipt for a sales operation:

1. Choose the  icon, enter **Sales Orders**, and then select a related link.
2. Create a new sales order for the relevant retail customer. For more information, see [Sell Products](#).
3. On the **Invoice Details** FastTab, fill in the **Fiscal Document Type** field to specify the type of the document to be created in the fiscalization process after posting a corresponding sales order. If the fiscal document type is not specified on the sales order card, fiscal documents are not created. The following document types can be selected:
 - o **Fiscal Receipt** - Specifies that a fiscal receipt will be created for the sales order after it is posted.
 - o **Fiscal Receipt with Invoice** - Specifies that a fiscal receipt will be created for the sales order after it is posted and the invoice to fiscal receipt will be posted automatically.

NOTE

For more information about the process for posting the sales invoice to fiscal receipt, see [Issuing Invoices for Fiscal Receipts](#)

NOTE

If you specify a fiscal document type, the **Prices Including VAT** field will be set to *true* automatically including number series for newly created fiscal documents. For more information, see [Fiscalization Setup](#).

3. Fill in the sales lines.
4. Post the sales order using **Post** action. Choose one of the following options:

TYPE	OPTION	DESCRIPTION
Fiscal Receipt	Ship	Posts the shipment of the items.
	Fiscal Receipt	Posts fiscal receipt for items that have already been shipped.
	Ship and Fiscal Receipt	Runs posting of shipment and fiscal receipt one after another.
Fiscal Receipt with Invoice	Ship	Posts the shipment of the items.
	Fiscal Receipt with Invoice	Posts fiscal receipt for items that have already been shipped and automatically post sales invoice for the fiscal receipt.
	Ship and Fiscal Receipt with Invoice	Runs posting of shipment and fiscal receipt and automatically post sales invoice for the fiscal receipt.

As a result the following entries are created in the system:

- VAT entries,
- G/L entries,
- Customer Ledger Entries,
- Value Entries.

NOTE

This documentation covers creating fiscal receipt from the sales orders only. It looks the same from the sales invoice level.


See Also

[Fiscalization Setup Issuing Invoices for Fiscal Receipts](#)

Issuing Invoices for Fiscal Receipts

You can usually create either a fiscal receipt or fiscal receipt invoice to record the financial transactions between a customer and vendor.


Issuing Invoices for Fiscal Receipts

1. Choose the  icon, enter **Sales Fiscal Receipt Invoices**, and then select a related link.
2. Choose the **New** action.
3. Fill in the fields on the **General** FastTab as necessary.
4. Use the **Get Fiscal Receipt** function to get the fiscal receipt document number for the current fiscal receipt invoice. Then, the corresponding lines are created automatically based on fiscal receipt that was selected.
5. Choose **Preview Posting**.

On the **Posting Preview** page, you can see which entries will be created when you post the fiscal receipt invoice. You can select specific entry and then choose the **Show Related Entries** action to get more details.



6. Post fiscal receipt invoice using the **Post** action.

Creating a Fiscal Receipt Invoice from a Fiscal Receipt

1. Choose the  icon, enter **Fiscal Receipts**, and then select a related link.
2. Select the fiscal receipt that you would like to create the new fiscal receipt invoice.
3. Use the **Convert to Fiscal Receipt Invoice** function to create a fiscal receipt invoice from the selected fiscal receipt. This opens the page with newly created document.
4. Post the fiscal receipt invoice using the **Post** action.

Assigning VAT Attributes to a Fiscal Receipt Invoice

When recording documents required, VAT attributes should be assigned to specific types of items and services. On each page that is used for entering and posting a fiscal receipt invoice, the **Header VAT Attributes** and **Document VAT Attributes** actions have been added on the action bar. For the **Lines** and **Related Information** menus, the **VAT Attributes (Ctrl+Q)** action has been added.

1. Choose the  icon, enter **VAT Attributes** and then select a related link.
2. Check, if all attributes and their values have been created after setting up company. For more information, see [VAT Attributes](#).
3. Choose the  icon, enter **Sales Fiscal Receipt Invoices**, and then select a related link.
4. Create a new fiscal receipt invoice for the relevant fiscal receipt.
5. Use the **Header VAT Attributes** function to add and edit VAT attributes for a specific document using the **Edit VAT Attribute Set Entries** page. In the **VAT Attribute Code** and **VAT Attribute Value Code** fields, select the appropriate values.

Use the **Document VAT Attributes** function to open the **Document VAT Attributes Set** page, which shows the combined set of all VAT attributes for the document (attributes from the header plus all attributes from each line. This set will be used for VAT and customer entries).

6. Post the fiscal receipt invoice by using the **Post** action.

As a result, the related records for the document with VAT attributes will be created in the system, such as VAT entries and customer ledger entries.

See Also


[VAT Attributes](#)

Correcting or Cancelling Fiscal Receipts

You can correct or cancel a fiscal receipt. This is useful, if you make a mistake or if the customer requests a return. In case when the sales invoice has been posted for the fiscal receipt you create a sales credit memo.

Creating a Fiscal Receipt Return from a Sales Return Order

The following procedure describes how to create a fiscal receipt return.

1. Choose the  icon, enter **Sales Return Orders**, and then select a related link.
2. Choose the **New** action.
3. Fill in the fields on the **General** FastTab as necessary.
4. On the **Invoice Details** FastTab, the **Fiscal Document Type** field specifies which type of fiscalization document will be corrected.


[WARNING] If the **Fiscal Document Type** field is empty on the sales return order card, you cannot create a return for fiscal documents. For more information, see [Creating a Fiscal Receipt](#).

5. Use the **Get Posted Document Lines to Reverse** function to select lines from fiscal receipt, which will be corrected.


[WARNING] On the single sales return order only one fiscal receipt can be corrected.

6. On the created lines of sales return order, enter the correction changes that correspond with quantity.
7. Post sales return order using **Post** action.

Cancelling a Fiscal Receipt

1. Choose the  icon, enter **Fiscal Receipts**, and then select a related link.
2. Select the fiscal receipt that you would like to cancel.
3. Use the **Cancel** function to cancel a fiscal receipt. A sales return order will be automatically created and posted, it means that all positions from the fiscal receipt will be returned. Fiscal return order will be stored in the system and the source fiscal receipt will be updated.
4. Choose the **Show Canceled/Corrective Fiscal Receipt Return** action to view the fiscal receipt return that voids the initial fiscal receipt.

Correcting a Fiscal Receipt

1. Choose the  icon, enter **Fiscal Receipts**, and then select a related link.
2. Select the fiscal receipt that you would like to correct.
3. Use the **Create Corrective Fiscal Receipt Return** function to create a sales return order for fiscal receipt. This action will open **Sales Return Order** page with all lines copied from the source fiscal receipt. On the lines of sales return order, enter the correction changes that correspond with quantity.
4. Post sales return order using **Post** action.
5. Open page **Fiscal Receipts** and choose the **Show Canceled/Corrective Fiscal Receipt Return** action to view the posted


fiscal return orders.

Suggesting a Fiscal Receipt Statement

All fiscal receipts (issued for retail sales transactions) and corrections of fiscal receipts are marked to be skipped in the VAT register and included in the collective statement of retail sales transactions. If fiscal receipts are posted within the system, they should be entered in the records as a collective statement marked with the **RO** attribute in the VAT registered with Declaration (SAFT VAT). The system offers a batch job that suggests values that are a total amount of all the fiscal receipts posted in a given period in the general journal. The **General Journal** page contains the **Suggest Fiscal Receipt Statement** action.

Suggest a Fiscal Receipt Statement

To run the action for preparing collective statement for retail, please follow:

1. Choose the  icon, enter **General Journals**, and then select a related link.
2. Open the relevant journal, and then choose the **Suggest Fiscal Receipts Statement** action.
3. Fill in the fields as necessary. Hover over a field to read a short description:
 - **Starting Date** - Specifies the starting date of a VAT period.
 - **Posting Date** - Specifies the posting date that is used when the **Fiscal Receipt Statement** report is created for selected general journal lines.

NOTE

By default, the working date is entered, but you can change it.

- **VAT Settlement Date** - Specifies the VAT settlement date of the entry.
 - **Starting Document No.** - Specifies the next available number in the number series for the journal batch that is linked to the payment journal. When you run the batch job, this is the document number that appears on the first payment journal line. You can also fill in this field manually.
 - **Summarize per Period** - Specifies, if the action is to create one line per VAT period for all general journal lines with the same VAT rate.
4. The fiscal receipt statement is posted by using VAT accounts as debit and credit. In the VAT entries there will be two entries: one technical line is marked as **Skip in VAT Register**, the other, which will be included in the VAT register, has the **RO** attribute entered.

If receipts are created outside the system, such a journal should be prepared manually on the basis of daily or monthly fiscal cash register reports, and the technical line should be marked with **Skip in VAT Register** and the **RO** attribute should be assigned to the other entry.

Administration

In the articles that explain how to manage the Fiscalization extensions for Dynamics 365 Business Central, you will find information about system requirements, prerequisites (including dependency apps) and the installation and update processes.

TO	SEE
Learn more about system requirements for the application	System Requirements
Get to know how to install each application	Installation and Registration
Learn how to upgrade Business Central extensions	Application Upgrade

System Requirements

System requirements for the Fiscalization apps 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

The following articles provide links to the articles that describe the installation process of the Fiscalization solution, including dependency applications:

- Fiscalization Base App,
- Fiscalization Extension PL.

The installation process has been described for both online and on-premises environments.

NOTE

On-premises Environment

In the case of the on-premises environment, install each Fiscalization application separately according to the procedure.

On-line Environment

In the case of the on-line environment, install only Fiscalization Extension PL. Installation of Fiscalization Base App is run automatically.

TO	SEE
Learn how to install Fiscalization Base App	Installing Fiscalization Base App
Learn how to install Fiscalization Extension PL	Installing Fiscalization Extension PL

See Also

[Administration](#)

Installing Fiscalization Base App

In this article, you will find the prerequisites and installation process for the Fiscalization Base App application in the Dynamics 365 Business Central online i on-premises environments.

Installing the Application for Business Central On-Premises

To install the Fiscalization Base App application for Business Central on-premises, perform the following steps:

1. Download the installation file from the [IT.integro Product Portal](#). Add the 20022710 Fiscalization application for the client license.

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.

2. Run Dynamics NAV Administration Shell as an administrator.
3. To install the Fiscalization Base App application, run the command:

```
Publish-NAVApp -ServerInstance YourDynamicsNAVServer -Path ".\IT.integro sp. z o.o._Fiscalization Base App.app"
```

4. To synchronize the Fiscalization Base App application, run the command:

```
Sync-NAVApp -ServerInstance YourDynamicsNAVServer -Name "Extension Name" -Version VersionNr -Tenant [Tenant1, Tenant 2, default]
```

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.

1. To install the Fiscalization Base App application, run the command:

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

TIP

It is recommended to install the latest application version available.

Installing the Application for Business Central Online

In the case of the on-line environment, install only the Fiscalization Extension PL application that is available on the Microsoft AppSource marketplace.

Fiscalization Base App is installed automatically. For more information, read [Installing Fiscalization Extension PL](#).

TIP

It is recommended to install the latest application version available.

See Also

[Installing Fiscalization Extension PL](#)

[Publishing and Installing an Extension.](#)

Installing Fiscalization Extension PL

This article describes the prerequisites and installation process of Fiscalization Extension PL in the Dynamics 365 Business Central online and on-premises environment.

Installing the Application for Business Central On-Premises

IMPORTANT

Prerequisites

Before you install the Fiscalization Extension PL application, make sure that Fiscalization Base App is installed first. For more information, read [Installing the Fiscalization Base App](#).

To install the Fiscalization Extension PL application for Business Central on-premises perform the following steps:

1. Download the installation file from the [IT.integro Product Portal](#).

IMPORTANT

The IT.integro Product Portal can be accessed only by authorized IT.integro partners.

2. Run Dynamics NAV Administration Shell as an administrator.
3. To publish the Fiscalization Extension PL application, run the following command:

```
Publish-NAVApp -ServerInstance YourDynamicsNAVServer -Path ".\IT.integro sp. z o.o._Fiscalization Extension PL.app"
```

4. To synchronize the Fiscalization Extension PL application, run the command:

```
Sync-NAVApp -ServerInstance YourDynamicsNAVServer -Name "Extension Name" -Version VersionNr -Tenant [Tenant1, Tenant2, default]
```

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.

5. To install the Fiscalization Extension PL application, run the command:

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

TIP

It is recommended to install the latest application version available.

Installing the Application for Business Central Online

NOTE

In the on-line environment, Fiscalization Extension PL is automatically installed with the Fiscalization Base App component.

To install the Fiscalization Extension PL application for Business Central online perform the following steps:

1. On the [AppSource offer page](#), select **Contact me** and fill in the form to submit your request. IT.integro or an IT.integro partner will contact you soon.

CAUTION

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

TIP

It is recommended to install the latest application version available.

See Also

[Installing Fiscalization Base App](#)

[Publishing and Installing an Extension](#)

[Support for the Application](#)

Upgrade

This article describes the upgrade process for the Dynamics 365 Business Central extensions.

Upgrade Application for Business Central on-premises

To upgrade the Dynamics 365 Business Central extension for the Business Central on-premises, perform the following steps:

1. Run Dynamics NAV Administration Shell as administrator.
2. To publish the application, run the command:

```
Publish-NAVApp -ServerInstance YourDynamicsNAVServer -Path ".\IT.integro sp. z o.o._Fiscalization Extension PL.app"
```

3. To synchronize the application, run the command:

```
Sync-NAVApp -ServerInstance YourDynamicsNAVServer -Name "Extension Name" -Version VersionNr
```

4. To upgrade data, run the command:

```
Start-NAVAppDataUpgrade -ServerInstance YourDynamicsNAVServer -Name "Extension Name" -Version VersionNr
```

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)	01 April, 2019	10 October, 2023
Dynamics 365 Business Central on-premises 2019 Release Wave 2 (BC 15)	01 October, 2019	13 April, 2021
Dynamics 365 Business Central on-premises 2020 Release Wave 1 (BC 16)	01 April, 2020	12 October, 2022
Dynamics 365 Business Central on-premises 2020 Release Wave 2 (BC 17)	01 October, 2020	12 April, 2022
Dynamics 365 Business Central on-premises 2021 Release Wave 1 (BC 18)	01 April, 2021	11 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	10 October, 2023
Dynamics 365 Business Central on-premises 2022 Release Wave 2 (BC 21)	03 October, 2022	14 April, 2023
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 ReleaseWave 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 AppSourceLeads@it.integro.pl

[IT.integro Apps on the Microsoft AppSource marketplace](#)

[IT.integro Offer](#)

[Software Lifecycle Policy and Dynamics 365 Business Central On-Premises Updates](#)

[Dynamics 365 Business Central on-premises \(Modern Policy\)](#)