# LICENSING GUIDE

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AUGUST 2022

Licensing guide

Using this guide

The licensing guide is provided to all bluefort partners and or end customers providing insight on licensing the bluefort product suites. Based on your business needs and requirements, you can establish the right licensing bill of quantities.

> **LISA** stands for **Li**cense and **S**ubscription **A**utomation
> **HARP** is short for **H**yper **A**utomation **R**apid **P**rocessing
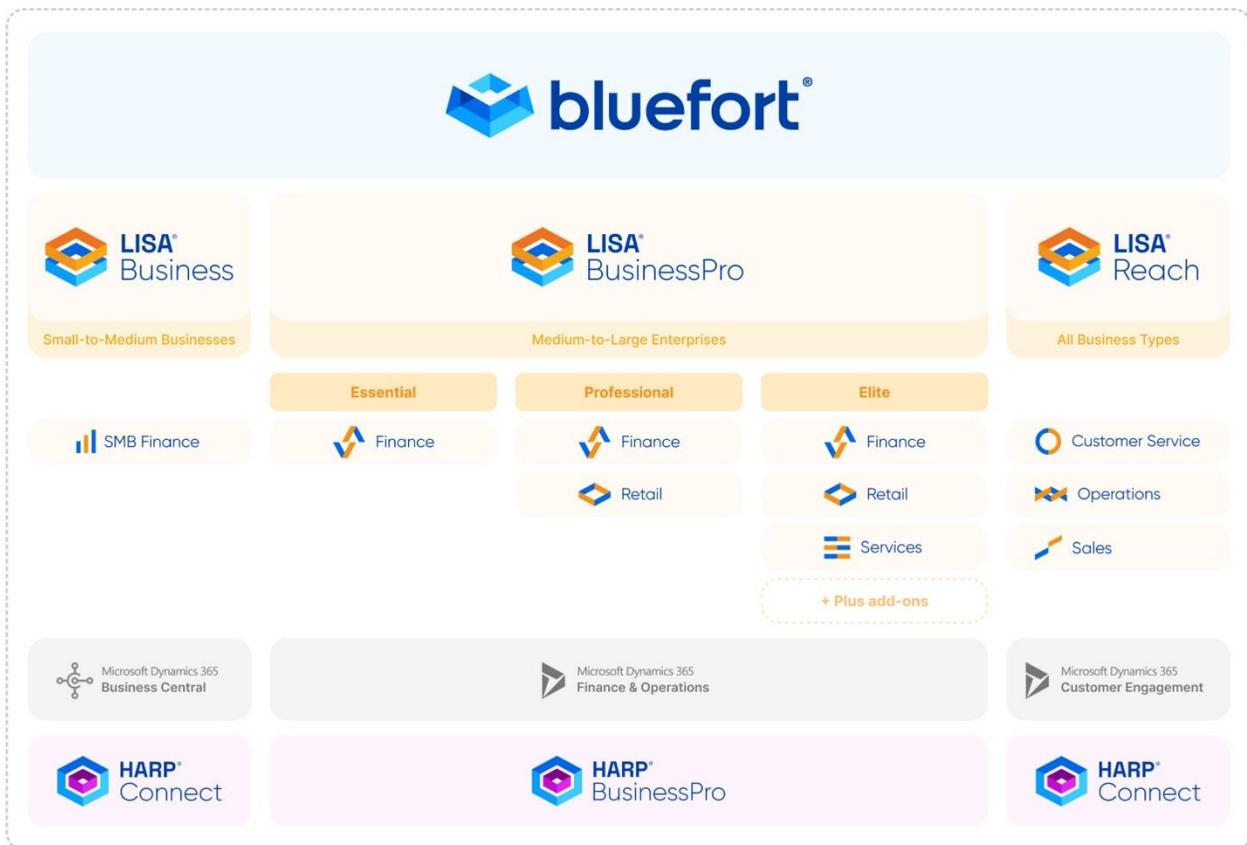
bluefort is a software and technology company focused on Subscription Business Applications. Our objective is to create smart subscription solutions so that our customers can benefit from hyper-automation capabilities and focus on growing their subscriber base.

GETTING STARTED

bluefort has designed the LISA business application suite based on Microsoft Dynamics 365. Since the different applications serve different purposes, below you can see the dependencies between LISA and the different Microsoft Dynamics 365 applications.

Application	**Runs in:**	**Built for:**
LISA Business	Microsoft Dynamics 365 Business Central	SMBs
LISA BusinessPro	Microsoft Dynamics 365 Finance, Supply Chain Management and Commerce	Medium to large companies
LISA Reach	Microsoft Dynamics DataVerse	Everyone

LISA applications can be extended with the Microsoft Power Platform and Microsoft Teams to streamline automation across applications and improve collaboration.

This document is about licensing bluefort software, but it is not a legally binding licensing rights document. For more information about terms and conditions please review the Licensing terms and bluefort's general terms.

For help in determining the right technology solution for your organization, including the license requirements for a specific product or scenario, please talk to your bluefort account team or your Microsoft Dynamics Certified Partner. bluefort reserves the right to review or update this document at any time without notice.

LISA applications explained

If you are starting your journey to solve your business challenges with modern and smart cloud-based business applications, then you have come to the right place. There are several ways to determine which of the LISA applications are most suitable for your business. Let's check out the different applications:

LISA BUSINESS is an application designed for small and medium-sized SaaS and other subscription companies that require more automation and customer service capabilities surrounding their ERP. LISA BUSINESS runs in Microsoft Dynamics 365 Business Central. As a full SaaS solution, it is easy to deploy and operate and has a fast return on investment.

LISA BUSINESSPRO is bluefort's largest application built to service a broad spectrum of subscription processes. It runs in Microsoft Dynamics 365 Finance and Operations and integrates with Project Management and Accounting, Asset

management as well as Commerce. Serving larger companies, it is capable to support deep and wide process requirements.

The different functions that LISA BUSINESSPRO serves are defined below:

Finance LISA BUSINESSPRO FINANCE is the heart of the subscription solution. It manages your subscription plans for your customers and drives financial transactions for revenue and costs and deals with your IFRS 15 or ACS 606 revenue recognition needs. It is tightly integrated with all the financial modules in Microsoft Dynamics 365 Finance.

Retail To expand your subscription model into B2C Retail Box Subscription scenarios, you can add LISA BUSINESSPRO RETAIL. This application is designed to bring subscription management capabilities to retailers. It can integrate into your eCommerce stores and capture customer subscriptions for media, content, and product delivery schedule.

Services The professional services industry is moving rapidly to new subscription-based models, such as managed services for continuous customer success engagements. The common denominator is a model that provides a steady stream of service revenue on a periodic basis, with periodic fees attached. This creates a balanced-budget scenario for customers while delivering a predictable service. These new subscription services models are mapped to LISA BUSINESSPRO'S Services application. It allows you to connect your project services to a subscription plan driving recurring revenue and managing your services using the power of the project management and accounting capabilities in Microsoft Dynamics 365 Finance and Operations.

Expanding your sales yet keeping control of the workloads is a foundational capability in any business. Driving sales cycles in the subscription world is different than in a classic product or service sale. We're selling a continuous relationship based on the provisioning of a service or delivery of products over a period. KPIs are different in subscription sales reporting. This is the domain of LISA REACH. Using the intelligent Customer Service, Project Operations, and Sales and Marketing capabilities of Microsoft Dynamics 365 and deployed as a Microsoft DataVerse app, LISA REACH supports sales and customer services teams by selling and updating subscription plans. LISA REACH connects to LISA BUSINESSPRO for process automation.

Companies empowered with LISA REACH SALES empower their sales and customer services teams with an application that tracks all subscription commercial activities from lead to order. They can create new subscription quotes and opportunities or just pick up a running subscription and upgrade or downgrade it. You can extend LISA REACH SALES with LISA BUSINESSPRO to integrate your subscription CRM and ERP using standard Dualwrite technology so that they are fully synced. LISA REACH SALES licensing is based on HARP engine chosen.

LISA REACH OPERATIONS works in conjunction with Microsoft Dynamics 365 Project Operations and Finance to offer next-generation project management capabilities. Build your project structures in Project Operations and use them in LISA REACH OPERATIONS to manage those elements in your project that are subscription-based. LISA REACH OPERATIONS licensing is based on HARP engine chosen.

Customer experience is at the core of any successful subscription business. LISA REACH CUSTOMER SERVICE brings the subscription model

into Microsoft Dynamics 365 Customer Service. Allow your customers to self-service their subscriptions using portals designed as you see fit. LISA REACH CUSTOMER SERVICE licensing is based on HARP engine chosen

How to buy

LISA applications can be purchased via bluefort partners or directly via bluefort, depending on how you envision your digital transformation journey.

LICENSE MODELS

LISA is licensed based on the following models:

Application	License model	Depends on
LISA Business	Plan-based model + Action consumption model	Microsoft Dynamics 365 Business Central
LISA BusinessPro	Plan-based model with add-ons	Microsoft Dynamics 365 Finance and Operations
LISA Reach	Plan-based model + Action consumption model	Microsoft DataVerse

Licenses grant users non-perpetual rights (with no buy-out rights) to the use of one or more specific bluefort LISA products in the cloud (not on-premises). As long as your subscription payments are up to date and you adhere to the terms and conditions, you will have access to the current licensed bluefort LISA product.

Startup fees apply for all products. The startup fee is a one-time fee that includes onboarding, access to the portals and eLearning sites, and the management of support.

HARP ACTION MODEL

LISA uses HARP technology. HARP stands for Hyper Automation Rapid Processing. The HARP service is the engine that manages subscription plans and lines and processes them into actions. HARP is available within LISA BusinessPro as a Microsoft Dynamics 365 Finance and Operations batch service or as a SaaS cloud service. Actions are defined as:

Unlock subscription business

HARP

Why actions?
Actions are the counted units we generate to automate each step in the subscription lifecycle. The value we bring is based on reducing manual action management, by automating the below actions. As we position LISA as a key solution for Subscription management, the license plans reflect that commercially as well.

Determine subscription actions volume
1. Generate sales order invoice lines
2. Revenue recognition actions
3. Generate security deposit request
4. Request for deposit payment
5. Generate purchase order
6. Cost recognition actions
7. Renewal approval
8. Monitoring of entitlement usages in project and meterage

Sales invoice line actions
Determine the average monthly volume of subscription invoice lines

Revenue recognition actions
Determine the average monthly volume of LISA recognized revenue actions per month

Security and normal deposit actions
Determine the average monthly volume of deposit actions resulting in request for payment (usually upfront)

Purchase order line actions
Determine the average monthly volume of purchase line (back to back with sales lines or stand alone) actions

Cost recognition actions
Determine the average monthly volume of cost recognition actions based on purchased subscriptions

Renewal approval actions
Determine the average monthly volume of renewal approvals of existing subscription agreements

Entitlement monitoring actions
Determine monthly entitlement action volume based on pay-per-use or consumption or entitlements

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Any action generated by HARP counts towards the sum of actions per month or year and requires license coverage. When you reach the limits of your actions count coverage, you will automatically be notified by LISA's telemetry through an email. You are not entitled to exceed the upper limit of your actions total per period. In such a scenario bluefort can assist in providing options to update your plan to stay compliant with your license terms and conditions.

Action list is not a final or complete list and action types may update from time to time.

Licensing LISA Business

Requires you to buy and deploy a Business Central SaaS license. bluefort or your partner can assist you with purchasing your Business Central licenses.

Licenses for LISA Business are currently only available for SELECT clients.

Should you wish to join the SELECT program, kindly contact us at sales@bluefort.eu.

Licensing LISA BusinessPro

To license LISA BusinessPro you require an active Microsoft Dynamics 365 Finance and Operations application license. bluefort or your partner can assist you with purchasing your business licenses.

Licensing requirements

Acquiring LISA BusinessPro licensing is based on subscribing to the plan that best suits your needs. You can move up or down between plans, depending on your business needs. All plans provide:

- Access to LISA BusinessPro license for One Production D365 FO instance.
- Access to LISA BusinessPro eLearning portal for all users.
- Access to bluefort's customer services portal and support team.
- Support hours depending on the plan. Access is provided to 2 users per customer. Hours are actively monitored and reported periodically.
- Issue fixing of technical anomalies
- Active monthly application updates based on Customer or Partner side LCS asset library published by bluefort's engineering team, consisting of the latest issue roll-ups, and when applicable, new features described in release notes

All BusinessPro plans have a startup fee. The following plans are available for licensing:

Essential plan. This plan is based on a maximum of 1,000 actions per month and grants access to LISA BusinessPro Finance only. 20 support hours per year are included.

Professional plan. This plan is based on a maximum of 2,500 actions per month and grants access to LISA BusinessPro Finance and Retail only. 60 support hours per year are included.

Elite plan. The Elite plan is based on a maximum of 8,000 actions per month and grants access to all LISA BusinessPro applications. 100 support hours per year are included.

The Elite plan has the following add-ons:

1. Enable yearly roll-up of actions. Roll up your actions count yearly instead of monthly. Enables your subscription business to deal with periodic action fluctuations without the need to buy more action add-ons before consuming all your annual action entitlements.
This add-on can be licensed only in addition to the Elite plan.

2. Additional action pack of 2,000 actions monthly.
This action pack can be used in conjunction with the yearly roll-up add-on above.
This add-on can be licensed only in addition to the Elite plan.

Licensing LISA Reach

You must start with Microsoft Dynamics 365 applications license or access to Microsoft DataVerse. bluefort or your partner can assist you with purchasing your business licenses.

Licensing requirements
Currently, LISA Reach can be licensed only when licensing LISA BusinessPro. The minimum contract term is 1 year. The License will be charged based on the HARP engine licensing model.

Access to LISA Reach license for One Production D365 CRM instance.

LISA Reach will be available as a standalone and with LISA Business when HARP Connect is launched.

Licenses include:

- Unrestricted access to all business functionality in LISA Business.
- Ability to create integration from 3rd party apps or services to LISA Business data entities.
- Access to bluefort's customer services portal and support team.

Frequently asked questions

Ever since we released LISA to our partners and customers, some questions and situational issues arose. In this section the most frequently asked questions are documented. In case you have more questions about LISA licensing, kindly contact sales@bluefort.eu for support.

Q: If we license LISA Reach Sales and Operations, which Microsoft Dynamics 365 apps do I need to license?

A: Microsoft 365 Licensing offers base DataVerse licensing and for LISA Reach Operations you require licensing Microsoft Dynamics 365 Project Operations and optionally Microsoft Dynamics 365 Sales.

Q: We licensed only Microsoft Dynamics 365 Finance, but we require a LISA BusinessPro Elite plan. Elite depends on Microsoft Dynamics 365 Commerce; can I still purchase the Elite plan and deploy LISA BusinessPro?

A: Yes, you can. LISA BusinessPro has 3 apps, Finance, Retail and Services, and they are separated by configuration keys. When purchasing the Elite plan, you can switch off Retail if you do not require it.

Q: If I purchase the LISA BusinessPro Professional plan and after several months my actions count reached the maximum, how can I add more actions?

A: You can upgrade to the next plan inline. In the case of Professional, you would be required to update to the Elite plan. bluefort will credit the pro-rata remaining period of your Professional licenses and start a new license term and plan to accommodate your actions count requirements.

Q: Can we downgrade from LISA BusinessPro Professional to Essential?

A: Yes, you can downgrade your plan. Based on the terms you will need to notify bluefort Licensing. bluefort will credit the pro-rata remaining period of your Professional licenses and start a new license term and plan to accommodate your actions count requirements.

Q: What is the difference between monthly action counts in the plans and the add-on "Enable yearly roll-up of actions"?

A: When you buy a plan, the action counts limit is measured month-by-month. LISA BusinessPro provides telemetry capabilities that notify you when you are approaching the action count limits for a month. This detail is available in the LISA BusinessPro system parameters.

If your business produces more actions in certain months than others, you might exceed the monthly limit. In that case, you can opt to license the add-on "Enable yearly roll-up of actions" so that the roll-up is not based on months but for a full year, resulting in a more flexible model to offset peaks in actions due to for example promotions or seasonal situations.

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

A: Yes, it is possible to use standard Microsoft Dynamics 365 extension tools to extend the LISA applications. There might be some scenarios where support is required for you to extend LISA applications. In that case, you may submit a support ticket to www.bluefort.eu.

Change log

Id	Date	Change
1	26/05/2022	Update to price model LISA Business and LISA Reach