DYNAVISION

Documentation:

Contributions & Declarations

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1 Introduction

Welcome to the official manual of the Dynavision Contributions and Declarations module.

This application makes it possible to manage all kinds of surtaxes *(e.g.: BEBAT, Recupel)* without creating extra challenges in the general ledger or inventory while keeping extra administrations at a minimum.

- Create a type of contribution (eg bebat, recupel, …).
- Choose which purchase, sales documents and which GL accounts are used for this type of contribution.
- Define categories per contribution type to make it possible to assign text & tariffs.
- Add exceptions (vat-liable yes or no, country specific exceptions, …).
- Insert the contributions automatically for items and resources.
- Automatically post shipment with all WMS flows.

2 Installation

2.1 Extension

The Dynavision Contributions & Declarations module is a separate Business Central extension.

1. Choose the search icon, enter **Extension Management**, and then choose the related link.
2. Choose **Manage** in the Action bar on the page and choose action **Extension Marketplace**.
3. In the search bar, enter **Dynavision Contributions and Declarations** and install this app.
4. Activate the trial as described in following **Get Started guide**.

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3 Configuration

3.1 Contribution Types (general ledger account with dimensions)

1. Choose the search icon, enter **Contribution Types**, and then choose the related link.
2. On the page that opens, choose the action **New** to add a new type.
3. Enter the necessary information.
   a. **Code**
      The code that identifies the Contribution Type.
   b. **Description**
      The description of the Contribution Type.
   c. **Sales Invoice Account No.**
      The G/L account that is used for posting the contribution on the Sales Invoice.
   d. **Sales Credit Memo Account No.**
      The G/L account that is used for posting the contribution on the Sales Credit Memo.
   e. **Sales Return Memo Account No.**
      The G/L account that is used for posting the contribution on the sales Return Credit Memo.
   f. **Purch. Invoice Account No.**
      The G/L account that is used for posting the contribution on the Purchase Invoice.
   g. **Purch. Credit Memo Account No.**
      The G/L account that is used for posting the contribution on the Purchase Credit Memo.
   h. **Purch. Return Order Account No.**
      The G/L account that is used for posting the contribution on the Purchase Return Order.

For each contribution, you can add the corresponding Rates, Categories and Texts.
You can also add a Dimension on each contribution for financial reporting.
The dimensions will be added on the newly created line. The most specific dimension will be taken on the line.
Following logic is used:

1. The dimension set on header level is added.
2. Then the dimension value of the source line, in case this is the same dimension as the one on the header level, the dimension value will be overwritten by the one on the source line from which the contribution is created.
3. The dimensions of the contribution type are regarded. In case this is the same dimension as the one on the source line level, the dimension value will be overwritten.
4. The dimensions set on the G/L account are regarded. In case this is the same dimension as the one on the contribution type, the value will be overwritten by the one set on the G/L account.

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3.1.1 Contribution Categories

1. On the page **Contribution Types**, Choose the action **Categories**
2. Choose the action **New** to add a new category.
3. Enter the necessary information.
    a. **Code**
    The code that identifies the Contribution Category.
    b. **Description**
    The description of the Contribution Category.
    c. **Description 2**
    The second description of the Contribution Category.
4. Choose action **Translations** to enter the translations for the Contribution Category Descriptions.

Remark: multiple Item Contributions can be attached to 1 category.

Tip: If a filter is set on number of item contributions different from 0 then the selection of categories that is in use will be shown. (i.e. which category has an article contribution attached to it).

3.1.2 Contribution Group Codes

Contribution Tariffs may be different for different Countries, e.g. 10 euro in France, 5 euro in Germany.
In order to make this possible, Contribution Group Codes can be set up, which will be used in suggesting the correct tariff on sales/purchase documents for Customers/Vendors.

1. Choose the search icon, enter **Contribution group codes**, and then choose the related link.
2. Choose the action **New** to add a new Contribution group code.
3. Enter the necessary information.
    a. **Code**
    The code that identifies the Contribution Group.
    d. **Description**
    The description of the Contribution Group.

3.1.3 Contribution Tariffs

Each contribution has its own tariffs depending on the legislation.
Regarding BEBAT, these are the different rates.
To each **Category Code**, a tariff is assigned.

1. On the page **Contribution Types**, Choose the action **Tariffs**.
2. Choose the **New** action to add a new Tariff.
3. Enter the necessary information.
    a. **Product Type**
    Specifies to which Product Type the Tariff applies, if empty then it applies to all product types.
    The options are:
        i. Item, and
        ii. Resource.
    b. **Category Code**
    The Category Code of the Contribution Category to which the Tariff needs to be assigned.
    c. **Applies-To**
    Specifies to which type of documents the Tariff applies. The options are:
        i. All,
        ii. Sales, and
        iii. Purchases.
    d. **Gen. Business Posting Group (Filter)**
    Specifies which General Business Posting Group needs to be present in order to add the Tariff. If the same General Business Posting Group is found on the Customer Card and Item Card, the Tariff will be inserted if the other conditions are also satisfied.
    e. **VAT Business Posting Group (Filter)**
    Specifies which VAT Business Posting Group needs to be present in order to add the Tariff. If the same General Business Posting Group is found on the Customer Card and Item Card, the Tariff will be inserted if the other conditions are also satisfied.
    f. **VAT Product Posting Group**
    Specifies which VAT Product Posting Group needs to be present in order to add the Tariff. If the same General Business Posting Group is found on the Customer Card and Item Card, the Tariff will be inserted if the other conditions are also satisfied.
    g. **Price Type**
    Specifies the price type that will be inserted.
    The options are:
        i. Unit price, and
        ii. Percentage.
    h. **Unit Price**
    The unit price that will be inserted in case **Unit Price** is chosen in the field **Price Type**.

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i. **Percentage**
The percentage that will be inserted in case **Percentage** is chosen in the field **Price Type**.

j. **VAT Business Posting Group (Price)**
Specifies the value of the VAT Business Posting Group that will be inserted on the line Contribution in the documents.

k. **Price Includes VAT**
Needs to be checked if the price includes the VAT.

l. **Currency Code**
The currency code for the contribution.

m. **Starting Date**
Defines the starting Date from which the Tariff is valid.

n. **Ending Date**
Defines the expiration date of the Tariff. When this date has been exceeded the Tariff will not be inserted anymore.

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3.1.4 Texts

Just as rates and categories are added, texts can also be added.
Example given, when selling to private individuals, the BEBAT contribution may already be included in the price and only a text/comment will be added.

1. On the page **Contribution Types**, Choose the action **Texts**.
2. Choose the **New** action to add a new Text.
3. Enter the necessary information.
    a. **Code**
    The code that identifies the Contribution Text.
    b. **Description**
    The text that will be displayed when the comment line is added to the document.
    c. **Category Code**
    The code of the category to which the text needs to be linked in case the text is specific for a certain Contribution Category.
    If blank, the text applies to all codes.
    d. **Applies-to**
    Specifies to which type of documents the Tariff applies. The options are:
        i. All,
        ii. Sales, and
        iii. Purchases.
    e. **Gen. Business Posting Group (Filter)**
    Specifies which General Business Posting Group needs to be present in order to add the Tariff. If the same General Business Posting Group is found on the Customer Card and Item Card, the Tariff will be inserted if the other conditions are also satisfied.
    f. **VAT Business Posting Group (Filter)**
    Specifies which VAT Business Posting Group needs to be present in order to add the Tariff. If the same General Business Posting Group is found on the Customer Card and Item Card, the Tariff will be inserted if the other conditions are also satisfied.
    g. **Starting Date**
    Defines the starting Date from which the Text is valid.
    h. **Ending Date**
    Defines the expiration date of the Text. When this date has been exceeded the Text will not be inserted anymore.
4. Choose action **Translations** to enter the translations for the Contribution Category Descriptions.

Remark:
If set, both texts and rates can be inserted for an item, whereby the text(s) are inserted first and then the rate(s) are inserted.
Note:
We have defined contributions here by items. This can, of course, also be done at the resource level.

3.1.5 Item Contributions/Resource Contributions

It is also possible to add the contributions on the **Item Card** or **Resource Card**.

1. Navigate to the **Item Card** or **Resource Card** to which the contribution needs to be added.
2. Choose the action **Contributions** which can be found when clicking **Item** or **Resource** respectively.
3. Fill in the necessary fields.
    a. **Item No. / Resource No.**
    The number of the Item to which the Contribution is assigned. This will be set to and filtered on the Number of the currently selected **Item Card.**
    b. **Base Unit of Measure (Item) / Base Unit of Measure (Resource)**
    Specifies the value of the base unit of measure field of the item/resource.
    c. **Type Code**
    The Contribution Type Code of the Contribution Type that needs to be assigned.
    i. **Category Code**
    The code of the category to which the Item Contribution needs to be linked.
    d. **Quantity Factor**
    Specifies the quantity factor, that will be applied according to the chosen Calculation Type. *This can be e.g. per 1 Base unit of measure, per kg (unit of the gross weight).*
    Example given*: formula= qty factor * selected calculation type = qty of contribution;*
    e.g. net weight on item is 2; qty factor = 1 per net weight; result: qty 2 of contribution will be added.
    e. **Quantity Calculation Type**
    Specifies the unit of measure that needs to be used for the calculation of the contributions.
    The options are:
        i. Base Unit of measure,
        ii. Gross Weight,
        iii. Net Weight,
        iv. Volume (*Cubage)*.
    f. **Description**
    Describes what the effect will be of the field settings.
    Example given:

Item No.	Base Unit of Measure (Item)	Type Code	Category Code	Quantity Factor	Quantity Calculation Type
140124	BOTTLE	BEBAT	A10101010030	1	Base Unit of Measure

Description*: "1 contribution from category: a101010030 per 1 bottle of the Item: 140124"*

    g. **Corresponding Tariffs**
    Indicates the number of possible applicable Tariffs. It is possible to select the number in the column in order to add or edit the tariffs that are applicable on this contribution.

3.2 Configuration of Group Codes on Customer/Vendor

In order for the Group codes to be applied on sales/purchase documents, they need to be set on the corresponding Customer/(optionally) ship-to address or Vendor/(Optionally) Order address.

1. Navigate to the **Customer/Vendor** on which the specific group code needs to be set.
2. On the card that opens, in the **Invoicing** section, select the **Contribution Group Code** in the relevant field.
3. Optionally add a **Contribution Group Code** on the **Ship-to Address/Order address** if this needs to be different.
    a. The Contribution Group Code that is set on the address card will take precedence over the one set on the Customer/Vendor Card.

4 Usage on documents

4.1 Sales/Purchase documents

1. Navigate to e.g. sales orders and choose the **New** action to create a new sales order.
2. Select the Customer/Vendor. This will automatically add the **Contribution Group Code**, if configured, to the document that is created.
    a. ***Remark:*** *If an address is selected on the document for the Customer/Vendor, and a Contribution Group Code was assigned to that address, the Group code on the document will be adjusted accordingly and the contributions will be reassessed.*
3. On the lines, select the Item that has a Contribution assigned.
4. On the lines, the **Contribution Text**, if set, and the **general ledger account** with the **Contribution Rate** and **Category** will be added if the line meets the set requirements for adding the contribution.
    a. ***Remark****: there are no quantities added to the lines yet, when the quantity is edited, the Contribution line will be adjusted accordingly.*

In the factbox pane on the sales order at the very bottom, There is a factbox that displays the Contribution information. The information shown will contain all Contribution information that is inserted on the document. This gives an overview of which Codes were used on the order.

The Contributions information will be copied to other documents that are created from a base document with the Contributions inserted.
The Contribution information will also be copied when archiving a document, or restoring a document that included the Contribution.
When a quote is made into an order, the Contribution information that was noted on the quote is also copied to the order.

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When doing the invoicing of the sales documents using **Combine Shipments, Get Shipment Lines** or **invoicing from the order**, the Contribution lines are also added to the invoice.
The lines will not be combined, they will be displayed under the item from which the contribution originated.
The Contribution will be linked to the Source Line when inserted on the Invoice using the functions, when also inserting the linked source line.
If only the contributions line is copied, the Contribution Record will have a nullguid in the source line systemid field.

4.1.1 Remark if trade installed

If Dynavision Trade is installed on the environment, it is possible to create a backorder for items that are not (completely) shipped yet on a sales document, or are not (completely) received yet. When there is a contribution linked to the item that needs to be added to a backorder, this line needs to be selected as well when the option **Selected Lines** is used in the action **Create back order**.
More information about the functionality can be found in the Dynavision Trade manual.

4.2 Warehouse documents

When a Contribution on an order is added, and a warehouse document is created, the text line and G/L account that was inserted for the contribution is not added to this document. It is also not noted on the posted warehouse documents and the printed layouts for this documents. This is irrelevant information for these documents, so this does not need to be visible.

4.2.1 Auto Post Non-Invt. Via Whse.

The non-inventory items, thus the contributions, will be sent and received, using the logic of the option **Auto Post Non-Invt. Via Whse.** setting on the pages **Sales & Receivables Setup** and **Purchase & Payables Setup**.
There are three options that can be chosen to send or receive the contribution lines on the document.

1. **None**
   When none is chosen, when sending or receiving items trough a warehouse document, none of the contribution lines will be sent or received when posting that warehouse document.
2. **Attached/Assigned**
   When Attached/Assigned is chosen, when sending or receiving items trough a warehouse document, only the contribution lines attached to the sent quantity of items will be sent or received when posting that warehouse document.
3. **All**
   When All is chosen, when sending or receiving items trough a warehouse document, all of the contribution lines will be sent or received when posting that warehouse document.

4.3 View the contributions on documents

There are list pages that can be used to get an overview of the contributions that are added to (posted) sales or purchase documents.
The pages can be found by choosing the search icon, entering the page that needs to be viewed, and then choosing the related link.
Following pages can be found and viewed:

- **Sales Contributions,**
- **Posted Sales Contributions,**
- **Purchase Contributions,**
- **Posted Purchase Contributions**.

On the list pages, the Document no. field will contain the document on which the contribution is added. Choose this value to navigate to the linked document.

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5 Contribution analysis view

It is possible to create an analysis view for the sales and purchase contributions. This report can fetch information that is made available in the contribution lines, and can be used to report the contributions that are posted in the system.
This information is also added to the corresponding API-pages, that can be used to create PowerBI reports.

1. Navigate e.g. to the page **Sales Contributions**.
2. Choose the “Extended View” option to see more information of the sales contributions.
3. Choose **Open in Excel** to extract the information to an Excel file.
4. Choose **Enter Analysis mode** to make an analysis view in Business Central with the data. Select the relevant data that needs to be displayed.