

System Solutions LLC Customer Rewards for D365 Business Central User Guide

Extension

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Description

- This app can give customers two types of rewards for making purchases: item rewards and sales rewards (monetary rewards). Both item and sales rewards are received by meeting predefined thresholds.

Customer Rewards Setup

- Search for and open the **Customer Rewards Setup** page to set up either Sales Rewards or Item Rewards.
- The **Default Days to Expire** field specifies the default number of days since the first sale until the customer's sales and reward balances expire. Set to 0 to disable expiration.
- The **Default Reward Limit** field specifies the default number of times a reward can be earned by a customer. Set to 0 for no limit.
- The **Payment Method** field in Sales Rewards section is the payment method that will be used when customers want to spend their earned rewards.
- The **Sales Rewards** table specifies the amount earned per amount spent. If multiple rewards are listed here, customers will earn rewards for any they are eligible for from the same sale.
- The **Item Rewards** table specifies how many items or groups of items reward the same item or item of the same group. Item rewards may be added for individual items or groups, which is specified by the Reward Type field. Items can be added to groups by selecting the line and clicking the Item Rewards table header > Reward Group Items.

Using Sales Rewards

- When an item is sold, its amount excluding tax will add to the customer's running rewards sales balance. Once the threshold is met, they will receive the sales reward. The sales and rewards balances can be seen through the customer card by clicking **Customer Reward Balances**. The balance for every customer can be seen on the **Sales Rewards Balance**.
- The "Rewards Earned History" and "Rewards Used History" buttons will open the full histories recorded for each reward. These values can be edited to change a customer's reward balance.
- A fact box is added to POS that displays the reward amount available to the selected customer. The Customer Reward Balances page is also accessible through POS.
- When a customer wants to spend their earned rewards, select the previously configured **rewards payment method** in POS when making the payment

Using Item Rewards

- The items sold and rewards balances can be seen through the customer card by clicking **Customer Reward Balance**, or on the **Item Rewards Balance** page.
- Similar to the sales rewards page, the “Items Sold History” and “Item Rewards History” buttons will open the recorded history that makes up these balances. These values can also be edited to adjust the available rewards of a customer.
- A fact box is added to POS that displays the reward quantity available to the selected customer. The Customer Reward Balances page is also accessible through POS.
- To redeem these free items, click the **Apply Item Reward** button in POS. This will add the item to POS with a 100% discount.

Expiring and Limiting Rewards

- Each reward that's set up can be given a number of days to expire. After the customer's first sale that adds to the reward's balance, it sets a date based on the number of days to expire. After the date, sales will no longer increment the balance and rewards can no longer be used. Setting the field to 0 means the reward will not expire.
- Each reward can also be set to give a limited number of rewards. For example, if the reward limit is set to 1, the customer will only receive the reward amount once.

Customers' Eligible Rewards

- By default, customers will start earning all rewards listed on the setup page. The **Earn Rewards** field on the Customer Card can be set to All (default), Custom, or None.
- If the customer is set to earn "custom" rewards, the **Eligible Rewards** button will be enabled on the Customer Card. Specify the type of reward and its code to opt the customer in to receive the reward.

Blocking Rewards by Item

- Earning rewards can be blocked for specific items with the added **Block Reward** field on Item Card.