User Manual H-PACK for Dynamics 365 Business Central

Version	Date	Description
1.0	2018/11/8	

Pacific Business Consulting, Inc.



н	User Man PACK for Dynamics 36!		Function Name	Sales & Purchase Documents
	rview			
Prov	ide signature and compan	y chop area with title and	name for sales and	d purchase documents.
Follo	wing list is a explanation f	for each sheet		
1 0110		or cach sheet.		
No.	項目	説明		
1	Overview	Overview for H-pack S	ales & Purchase doc	uments enhanced features . (this sheet)
2	Setup	Setup for Signature Tit	le and Name. (Com	pany Information, Report Selection - Sales, Report Selection - Purchase)
3	Print Sales Quote	Select a Sales docume	nt to print, for exam	ple Quote, Order, Invoice, Blanket Order, Credit Memo, Reture Order.
4	Print Purchase Order	Select a Purchase docu	ument to print, for ex	kample Quote, Order, Invoice, Blanket Order, Credit Memo, Reture Order.



User Manual H-PACK for Dynamics 365 Business (Function Name	Sales & F	Purchase Documents
Company Information			
<i></i>		+ m	
Company Information			
Navigate			م م
Doc. Signature			
Sales Quote Sign. Title Salesma	n	Purch. Quote Sign. Titl	Purchaser
Sales Quote Sign. Name · · · · · · · · · · · Peter W	າng	Purch. Quote Sign. Name	John Li
Sales Order Sign. Title Salesma	n	Purch. Order Sign. Title	Purchaser
Sales Order Sign. Name	มา	Purch. Order Sign. Name	Mary Wong
Sales Blk. Order Sign. Title Salesma	л	Purch. Blk. Order Sign. Title	Purchaser
Sales Blk. Order Sign. Name · · · · · · · · · · · Tony Ch	an	Purch. Blk. Order Sign. Name	Mary Wong
Sales Invoice Sign. Title Sales M.	inager	Purch. Invoice Sign. Title	Purchase Manager
Sales Invoice Sign. Name · · · · · · · · · · · Kitty Lee		Purch. Invoice Sign. Name	Robert Chan
Sales Cr. Memo Sign. Title Sales M.	inager	Purch. Cr. Memo Sign. Title	Purchase Manager
Sales Cr. Memo Sign. Name		Purch. Cr. Memo Sign. Name	Robert Chan
Sales Shipment Sign. Title Salesma	n	Purch. Receipt Sign. Title	Purchaser
Sales Shipment Sign. Name · · · · · · · · · · · · Tony Ch	an	Purch. Receipt Sign. Name	Mary Wong
Sales Ret. Order Sign. Title	n	Purch. Ret. Order Sign. Title	Purchaser
Sales Ret. Order Sign. Name	มา	Purch. Ret. Order Sign. Name	Mary Wong
Sales Ret. Rcpt. Sign. Title Salesma	n	Purch. Ret. Shpt. Sign. Title	Purchaser
Sales Ret. Rcpt. Sign. Name · · · · · · · · · · · · Tony Ch	an	Purch. Ret. Shpt. Sign. Name	Mary Wong



User Manu	al	Function Name	۲a	les & Purchase Documents
H-PACK for Dynamics 365	Business Central	I unction Name	34	
Field	Description			
Sales Quote Sign. Title	Fill in title of person in cha	arge for Sales Quote.		
Sales Quote Sign. Name	Fill in name of person in c	harge for Sales Quote		
Sales Order Sign. Name	Fill in title of person in cha	arge for Sales Order.		
Sales Order Sign. Name	Fill in name of person in c	harge for Sales Order.		
Sales Blk. Order Sign. Name	Fill in title of person in cha	arge for Sales Blanket	Order.	
Sales Blk. Order Sign. Name	Fill in name of person in c	harge for Sales Blanke	et Order.	
Sales Invoice Sign. Name	Fill in title of person in cha	arge for Sales Invoice.		
Sales Invoice Sign. Name	Fill in name of person in c	harge for Sales Invoice	e.	
Sales Cr. Memo Sign. Name	Fill in title of person in cha	arge for Sales Credit M	1emo.	
Sales Cr. Memo Sign. Name	Fill in name of person in c	harge for Sales Credit	Memo.	
Sales Shipment Sign. Name	Fill in title of person in cha	arge for Sales Shipmer	nt.	
Sales Shipment Sign. Name	Fill in name of person in c	harge for Sales Shipm	ient.	
Sales Ret. Order Sign. Name	Fill in title of person in cha	arge for Sales Return (Order.	
Sales Ret. Order Sign. Name	Fill in name of person in c	harge for Sales Returr	n Order.	
Sales Ret. Rcpt. Sign. Name	Fill in title of person in cha	arge for Sales Return F	Receipt.	
Sales Ret. Rcpt. Sign. Name	Fill in name of person in c	harge for Sales Returr	n Receipt.	
Purch. Quote Sign. Title	Fill in title of person in cha	arge for Sales Quote.		
Purch. Quote Sign. Name	Fill in name of person in c	harge for Sales Quote		
Purch. Order Sign. Name	Fill in title of person in cha	arge for Sales Order.		
Purch. Order Sign. Name	Fill in name of person in c	harge for Sales Order.		
Purch. Blk. Order Sign. Name	Fill in title of person in cha	arge for Sales Blanket	Order.	
Purch. Blk. Order Sign. Name	Fill in name of person in c	harge for Sales Blanke	et Order.	
Purch. Invoice Sign. Name	Fill in title of person in cha	arge for Sales Invoice.		
Purch. Invoice Sign. Name	Fill in name of person in c	harge for Sales Invoice	e.	
Purch. Cr. Memo Sign. Name	Fill in title of person in cha	arge for Sales Credit M	1emo.	
Purch. Cr. Memo Sign. Name	Fill in name of person in c	harge for Sales Credit	Memo.	
Purch. Receipt Sign. Name	Fill in title of person in cha	arge for Sales Shipmer	nt.]



User Manua H-PACK for Dynamics 365		Function Name	Sal	les & Purchase Documents
Purch. Receipt Sign. Name	Fill in name of person in c	harge for Sales Ship	ment.	
Purch. Ret. Order Sign. Name	Fill in title of person in cha	irge for Sales Return	o Order.	
Purch. Ret. Order Sign. Name	Fill in name of person in c	harge for Sales Retu	rn Order.	
Purch. Ret. Shpt. Sign. Name	Fill in title of person in cha	irge for Sales Returr	Receipt.	
Purch. Ret. Shpt. Sign. Name	Fill in name of person in c	harge for Sales Retu	rn Receipt.	



		Manual	F	unction Name	e Sales & Purchase Documents			
H·	-PACK for Dynamics	365 Business Cen	tral					
-	ort Selection - Sales In H-Pack document in							
\leftarrow	REPORT SELECTION - SALES							
	Report Sele	ction - Sale	S					
_ C	Usage · · · · · · · · · · · · · · · · · · ·	Qu	ote		•			
		Qu						
	Manage		Net Order Quote					
		Orc						
			pice rk Order					
		EPORTID REPORT CAP Wo 70148921 Sales - Quote Ret	urn Order		ION			
			dit Memo					
		Shi	pment					
		1						
Field		Description						
Usag	e	Select usage of rep	ort and assig	n corresponding	a document.			
			-					
		Usage Quote	Report ID 70148921	Report Capti				
		Blanket Order	70148921	Sales - Quote Blanket Sale				
		Order	70148922	Order Confir				
		Invoice	70148924	Sales - Invoid				
		Return Order	70148927	Return Orde	r Confirmation			
		Credit Memo	70148925	Sales - Credi	t Memo			
		Shipment	70148926	Sales - Shipn	nent			
		Return Receipt	70148928	Sales - Return	n Receipt			



Receipt

Return Receipt

70148934

70148936

U	ser Manual	F	unction Name		Sales & Purchase Documents
H-PACK for Dyna	mics 365 Business Cer	tral	unction Nume		Suits a fulchase bocaments
eport Selection - Pu	ırchase				
Assign H-Pack docum	ent into Report Selectior				
← REPORT SELECTION -	PURCHASE				
·					
Usage · · · · · · · ·		Order		•	
Manage				Ľ	2
			USE USE		
			FOR FOR EMA EMA		
SEQUENCE	REPORT ID REPORT CAP	TION	BODY ATTA	EMAIL BODY LAYOUT DESCRI	IPTION
1 :	70148930 Order			-	
]	
Field	Description				
Jsage	Select usage of rep	ort and assig	n corresponding	a document	
Juge					
	Quote	70148939	Purchase - Q	uote	
	Blanket Order	70148931	Blanket Purc	hase Order	
	Order	70148930	Order		
	Invoice	70148932	Purchase - Ir	nvoice	
	Return Order	70148935	Return Orde	r	
	Credit Memo	70148933	Purchase - C	redit Memo	

Purchase - Receipt

Purchase - Return Shipment



		er Manua		antual	Functio	n Name					Print Sa	les Q	uote			
H-PA	CK for Dynan	nics 365	Business Co	entral												
ales Quot	e List															
Users ca	n print Sales C)uote Doc	ument from	Sales Quot	e list											
	ne list from Se				En	vironment						**				
	Dynamics 36	5 ~	Business	Central		ndbox		~	ହ ©) [٢	? 8			
\leftarrow		TELLM	E WHAT YOU W	ANT TO DO					2	\times						
	Sales	Sales C	Juoto								ר					
	Sales										J					
	,	Go to l	Pages and Tasl	ks								í				
		> Sal	les Quotes					Lists			J					
	NO.	> Qu	iotes - Microso	oft Dynamics 3	65 for Sales			Lists				1.				
	1001	Go to	Reports and A	nalysis												
	1002		es Quote Arch					Archive			2000	0				
		E 38	les Quote Arch	ives				Archive			2,345.6	3				
							SVIES									
\leftarrow																
	Sales Q	uote	2S													
	𝒫 Search	+ New	Manage	Process	Quote	Request	Approval	V Open	in Evcel		Actions	1	ess options.		í	_¥
			Release		Quote	Request	Approvar	open	III EXCEI		Actions		.033 0010113		\smile	-==
	l∎ Quote ∨ N0.	Create ~ NO.			ME NO.	SEL	L-TO CONTACT		DATE							1
1	1001 :	20000	Robert To	wnes		Hele	en Ray		4/2/20	Cus	tomer S	tatist	ics			
1	1002	40000	Helen Ray	,		lan	Deberry		4/3/20	Cust	omer No.				20000	
										Balar	nce (LCY)			2.3	845.63	



	amics 365	al Business Cei	ntral	Function	Function Name Print Sales Quote					
elect a Sales Quo	ote which y	vou want to p	orint							
From the Sales Qu	iote List : Se	elect a Sales Q)uote from	n Sales Quot	e List and press "A	ction" button on th	e "Navigation" Ribbon.			
\leftarrow										
Sales (Duote	24								
56165										
🔎 Search	+ New	Manage	Process	Quote	Request Approval	📲 Open in Excel	Actions Less options			
🗈 Quote 🗸	$Create \lor$	🗟 Release 🔻						다.		
NO.	NO.		JSTOMER NA	ME NO.	SELL-TO CONTAC		Curtan an Statistica			
1001	20000	Robert Town	nes		Helen Ray	4/2/20	Customer Statistics			
1002	40000	Helen Ray			Ian Deberry	4/3/20	Customer No.	20000		
							Balance (LCY)	2.345.63		
	Quote	es	nd "Print" Process		he Navigation Ribb Request Approval		Actions Less options	≣ ① ب ^ر		
Sales (Quote + New	2S Manage	Process		he Navigation Ribbo Request Approval	On.	Actions Less options			
Sales (Search Quote ~	Quote	Manage	Process	Quote		Open in Excel	Actions Less options	ا≣ ن ی ^ر ۲۳		
Sales (Search Quote ~ Statistics	QUOTE + New Create ~	Manage	Process	Quote	Request Approval	Open in Excel	Actions Less options			
Sales (Search Counte > Statistics Comments	QUOTE + New Create ~	Manage Release SELL-TO CL	Process	Quote	Request Approval SELL-TO CONTAC	Copen in Excel	Customer Statistics	4-		
← Sales (QUOTE + New Create ~	Manage Release SELL-TO CU Robert Tow	Process	Quote	Request Approval SELL-TO CONTAC Helen Ray	Copen in Excel T DATE 4/2/2C				
← Sales (QUOTE + New Create ~	Manage Release SELL-TO CU Robert Tow	Process	Quote	Request Approval SELL-TO CONTAC Helen Ray	Copen in Excel T DATE 4/2/2C	Customer Statistics	-12		



User Manual	Function Name	Print Sales Quote
H-PACK for Dynamics 365 Business Central	i unction Marile	
3. Print Sales Quote		
①Click "Print" or "Preview"		
EDIT - SALES - QUOTE	27	
Saved Settings		
Changes to the options and filters below will be saved only to: 'Last used option	is and filters'	
Use default values from: Last used options and filters	\sim	
Sales Quote		
Show results:		
Where: No. v is: 1001		
And: Sell-to Customer No. • is:	~	
And: No. Printed • is:		
Send to Print	Preview Cancel	



H-P/	User Manual H-PACK for Dynamics 365 Business Central					e	Print Sales Quote			
	ture area with Title				ooter	•				
	VAT Amount Specification VAT Identifier	VAT %	Line Amount	Invoice Discount Base Amount	Invoice Discount Amount	VAT Base	VAT Amount			
	STANDARD	25	1,251.00	1,251.00	0.00	1,251.00	312.75			
	Total		1,251.00	1,251.00	0.00	1,251.00	312.75			
	CONFIRMED BY : For and on behalf of				SSUED BY : For and on behalf of My Company					
	Authorized Signature a	and Co. Chop	,		Salesman Peter Wong					



User Manual	Function Name	Print Purcha	ase Order
H-PACK for Dynamics 365 Business Central			
Purchase Order List Users can print Purchase Order Document from Purchase	e Order list		
1. Go to the list from Search Box			
Dynamics 365 V Business Central	Purchase Orders	Environment v Q	© ₽ ? ?
C TELL ME WHAT YOU WANT	TO DO	$ \ \ \ \ \ \ \ \ \ \ \ \ \$	
Purchase Order			·
On current page (Purcha	ase Order List)		· 📰 🛈 🦯
B		ox or directly to the intercompany partner i	
NO. V Go to Pages and Tasks			
106002 2 Purchase Orders		Lists	10000
106003 4 > Purchase Return Ord	ers	Lists	10000 Meagan Bond
106004 3 > Blanket Purchase Ord	ders	Lists	
Go to Reports and Analy	vsis		nd@contoso.com
Purchase Order Arch		Archive	Krystal York
Inventory Purchase C		Reports and Analysis	
		Archive	
Purchase Return Ord	er Archives	Archive	



User Manual H-PACK for Dynamics 365 Business Central				Function Name	Print Purchase Order				
2. Select a Purchase Order which you want to print									
①From the Purchase Order List : Select a Purchase Order from Purchase Order List and press "Print" button on the "Navigation" Ribbon.									
\leftarrow									
Purchase Orders									
ļ	🔎 Search 🕂 New Manage Process Request Approval Print 🖾 Open in Excel … 🗮 🛈 🔎								
_	10.	BUY-FROM VENDOR NO.	BUY-FROM VEN	VEN	NDOR THORI LOCA				
10	06001 :	10000	Meagan Bond			Vendor Deta	ils∨		
10	06002	20000	Alpine Ski Hous	e		Vendor No.	10000		
10	06003	40000	Relectoud			Name	Meagan Bond		
10	06004	30000	lan Deberry			Phone No.			
						Email Fax No.	meagan.bond@contoso.com		
						Contact	Krystal York		



User Manual	Function Name		Print Purchase Order					
H-PACK for Dynamics 365 Business Central	T unction Nume		Find Fulchase Order					
②From the Purchase Order List : Press "Print" button on the Navigation Ribbon.								
<								
Purchase Orders								
	Process Request	t Approval <u>Print</u>	💶 Open in Excel	··· 🔳 🛈 🔎				
🛍 Send 🖶 Print	Send ➡ Print⊐							
NO. VENDOR NO. BUY-FROM	VENDOR NAME NO.	CODE						
106001 : 10000 Meagan B	lond	Ve	Vendor Details∨					
106002 20000 Alpine Ski	House	Ven	ndor No.	10000				
106003 40000 Relectoud		Nar	ne	Meagan Bond				
106004 30000 Ian Deber	ry		one No.					
		Ema	ail meag No.	jan.bond@contoso.com				
			ntact	Krystal York				



User Manual H-PACK for Dynamics 365 Business Central				Function Name	Print Purchase Order		
			Central	Function Name			
3. Print Pu	Irchase Order						
	Print" or "Preview"						
EDIT - ORDI	ER			2			
Saved Se	ettings						
Changes to	Changes to the options and filters below will be saved only to: 'Last used options and filters'						
Use default values from: • • • • • • • • • • • • • • • • • • •				\sim			
Purchas							
Show results: Where:		is:	Order				
where.	Document Type 🔻	15.	Order	•			
And:	No. 🔻	is:	106001				
And:	Buy-from Vendor No.	is:		~			
And:	No. Printed 🔻	is:					
		Sen	d to Print	Preview Cancel			



User Manual	Function Name	Print Purchase Order					
H-PACK for Dynamics 365 Business Central							
②Singature area with Title and Name will be shown on footer							
Unit of No. Description Quantity Measure	Direct Allow Unit Invoice VAT Cost Discount % Discount Identifier Amount						
1896-S ATHENS Desk 7.00 PIECE	506.60 Yes STANDAR 3,546.20						
	Total GBP 3,546.20						
Shin to Addrore							
Ship-to Address 5 The Ring Westminster London, W2 8HG Great Britain							
CONFIRMED BY : For and on behalf of Meagan Bond	ISSUED BY : For and on behalf of My Company						
Authorized Signature and Co. Chop	Purchaser Mary Wong						