

End User Guide (Customer Status Management)



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Version history

Version	Date	Revision Description	Prepared by
1.0	2016-12-12	First Version	The Createch group

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Objective User guide

The objective of this user guide is to present the step to managing customer status by blocking from shipping, invoicing or all transactions

Here are the actions possible by status

1 SHIP

- This status blocks for creation of new sales order
- This status blocks the shipping of existing sales order
- This status allows invoicing sales order already shipped
- This status allows to create a customer invoice not related to a sale order but doesn't allow to post the invoice
- This status allows to create and post a credit note
- This status allows to create a RMA, to receive it and to generate the credit note

2 INVOICE

- This status blocks for creation of new sales order
- This status blocks the shipping of a sales order
- This status blocks the invoicing of a sale order already shipped
- This status blocks the invoicing process of the customer
- This status doesn't allow to create a customer invoice not related to a sale order
- This status allows to create and post a credit note
- This status allows to create a RMA, to receive it and to generate the credit note

3 ALL

- This status blocks for all types of transactions (Sales Order, Ship, Invoice, Credit Note, RMA)

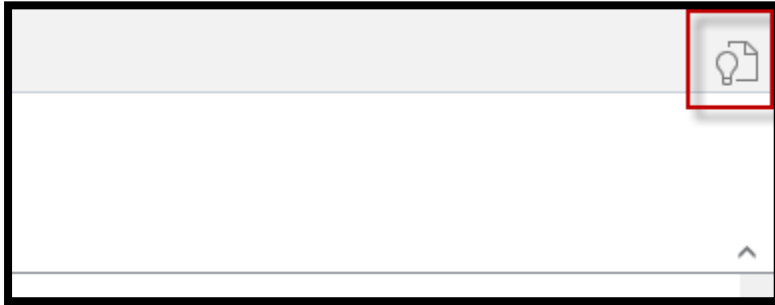
4 BLANK

- This status allows any type of transactions (Sales Order, Ship, Invoice, Credit Note, RMA)

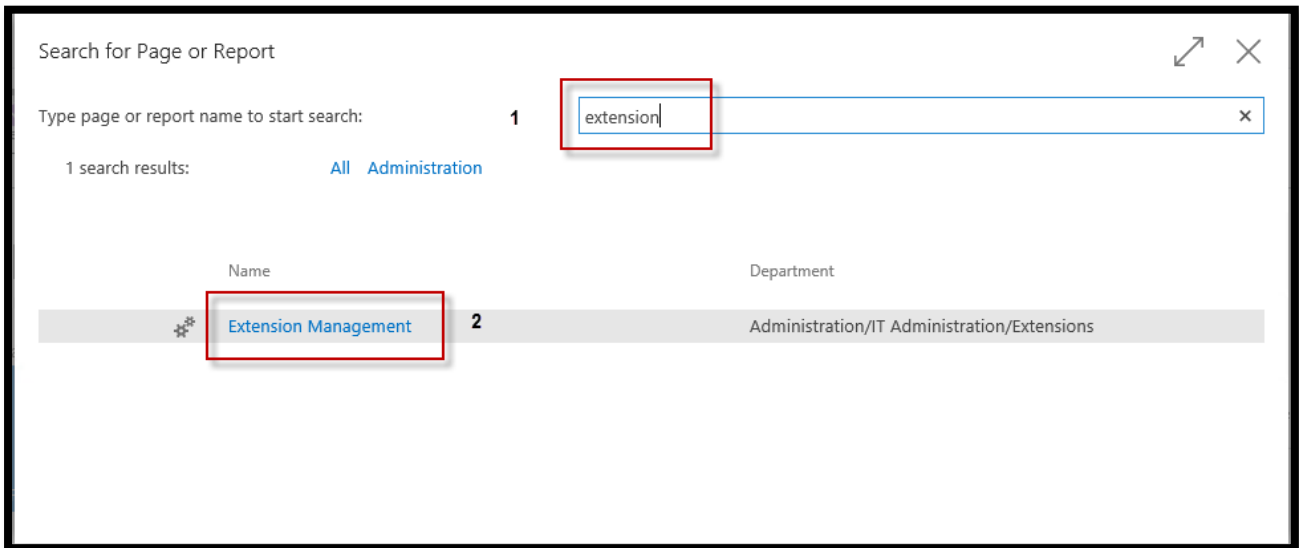
1. Installation of the extension

Before using the app in Dynamics 365, please make sure if the extension is installed. You can follow these steps:

- Click on the search function from your home page



- The search page opens:
 - 1- Enter extension in the search bar
 - 2- Select the related item



The extension management page opens:

HOME		ACTIONS	
View	Install	Uninstall	Open in Excel
Details	Learn More	Refresh	Page
VIEW - EXTENSION MANAGEMENT			
AdditionalInfo	Name	Version	
... Not Installed	311_ Créatech - EXI-147 - Quick Sales Documents	v. 1.0.0.0	
... Installed	Automatic Customer Statement	v. 1.0.0.0	
... Installed	Commercial Invoice	v. 1.0.0.0	
... Installed	Envestnet Yodlee Bank Feeds	v. 1.0.0.0	
... Installed	Estimation Tool	v. 1.0.0.0	
... Installed	Managing Customer Status	v. 1.0.0.0	
... Installed	PayPal Payments Standard	v. 1.0.0.0	
... Installed	QuickBooks Data Migration	v. 1.0.0.2	
... Installed	Sales and Inventory Forecast	v. 1.0.0.0	

If the status of the related extension is installed, the extension is correctly installed.

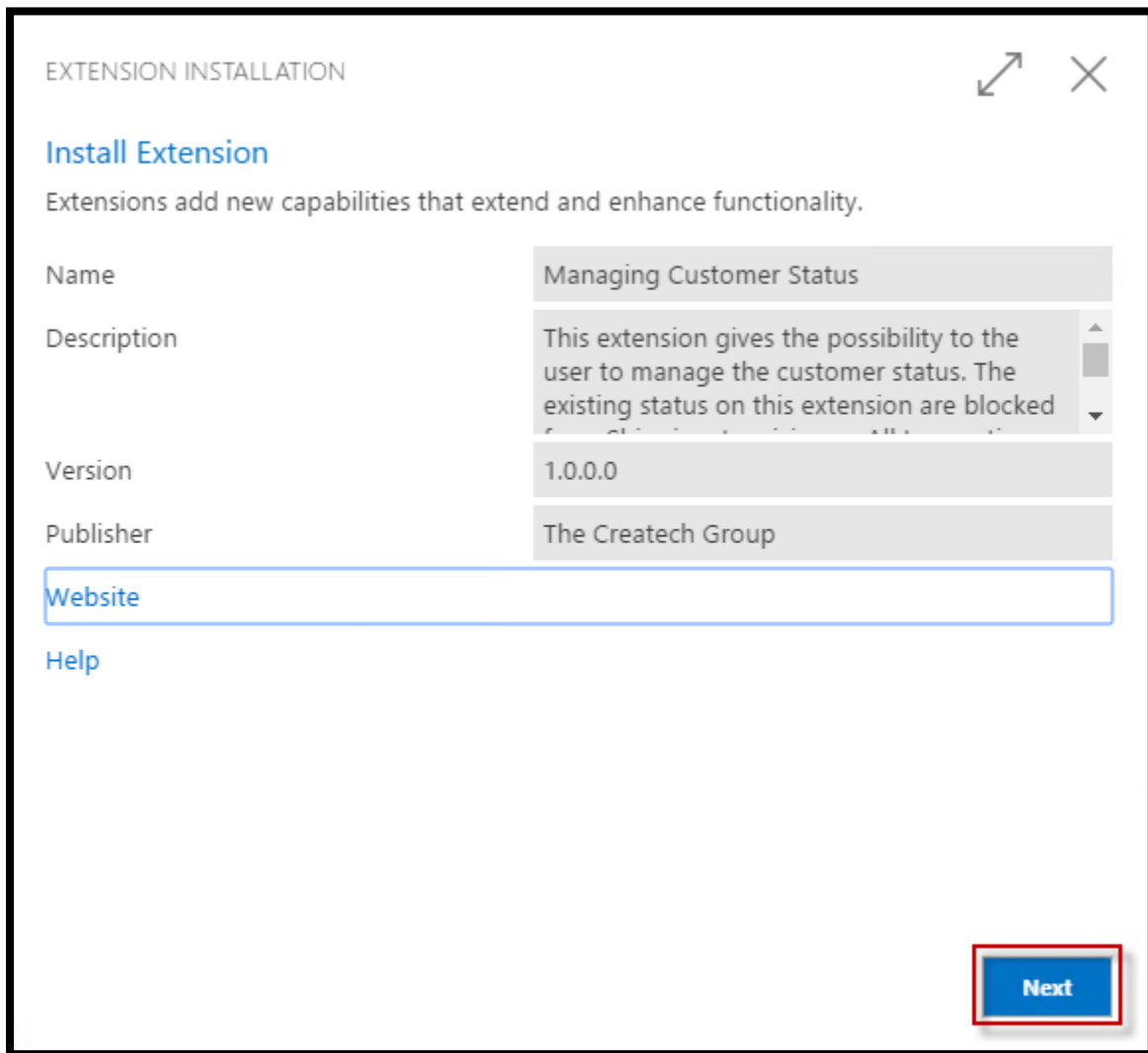
If it is Not Installed, you can:

- Click in the extension called "Managing Customer Status"

HOME		ACTIONS	
View	Install	Uninstall	Open in Excel
Details	Learn More	Refresh	Page
VIEW - EXTENSION MANAGEMENT			
AdditionalInfo	Name	Version	
... Not Installed	311_ Créatech - EXI-147 - Quick Sales Documents	v. 1.0.0.0	
... Installed	Automatic Customer Statement	v. 1.0.0.0	
... Installed	Commercial Invoice	v. 1.0.0.0	
... Installed	Envestnet Yodlee Bank Feeds	v. 1.0.0.0	
... Installed	Estimation Tool	v. 1.0.0.0	
... Not Installed	Managing Customer Status	v. 1.0.0.0	
... Installed	PayPal Payments Standard	v. 1.0.0.0	
... Installed	QuickBooks Data Migration	v. 1.0.0.2	
... Installed	Sales and Inventory Forecast	v. 1.0.0.0	

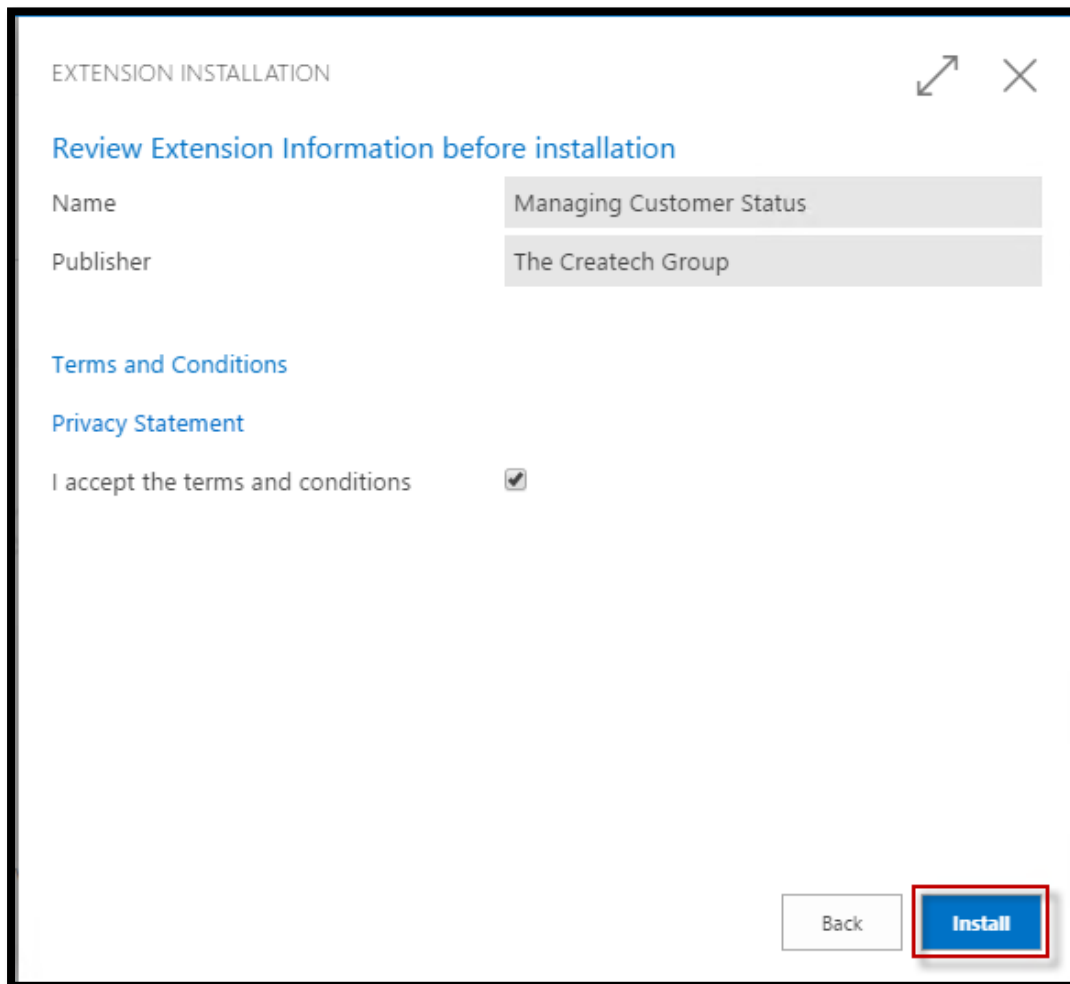
The Extension Installation Wizard opens:

- Click on Next



The next step of the wizard opens:

- Click on Install



EXTENSION INSTALLATION

[Review Extension Information before installation](#)

Name Managing Customer Status

Publisher The Createch Group

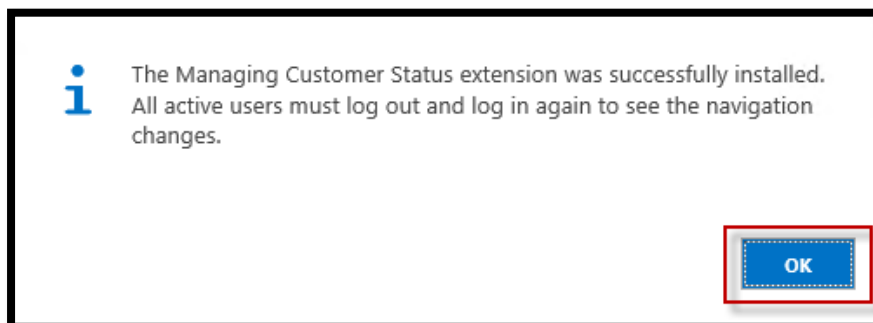
[Terms and Conditions](#)

[Privacy Statement](#)

I accept the terms and conditions

Back Install

Click on Ok.



i The Managing Customer Status extension was successfully installed.
All active users must log out and log in again to see the navigation changes.

OK

The extension is correctly installed.

2. Managing the customer status

This section describes the steps to manage the customer status

2.1. Defining the right status of the customer

1. Go to the customer list.
2. Choose the customer in which the status needs to be modified.
3. From the **General Tabs**, select the **Blocked field** and choose from the 3 options (Ship, Invoice, All)
For this example, the Ship Status is selected

The screenshot shows the 'EDIT - CUSTOMER CARD' interface for customer '30000 · School of Fine Art'. The 'General' tab is active, and the 'Blocked' field is highlighted with a red box. The dropdown menu for 'Blocked' is open, showing three options: 'Ship' (selected), 'Invoice', and 'All'. Other fields include 'No.' (30000), 'Name' (School of Fine Art), 'IC Partner Code', 'Balance (LCY)' (100,435.00), 'Balance Due (LCY)' (100,435.00), and 'Credit Limit (LCY)' (0.00).

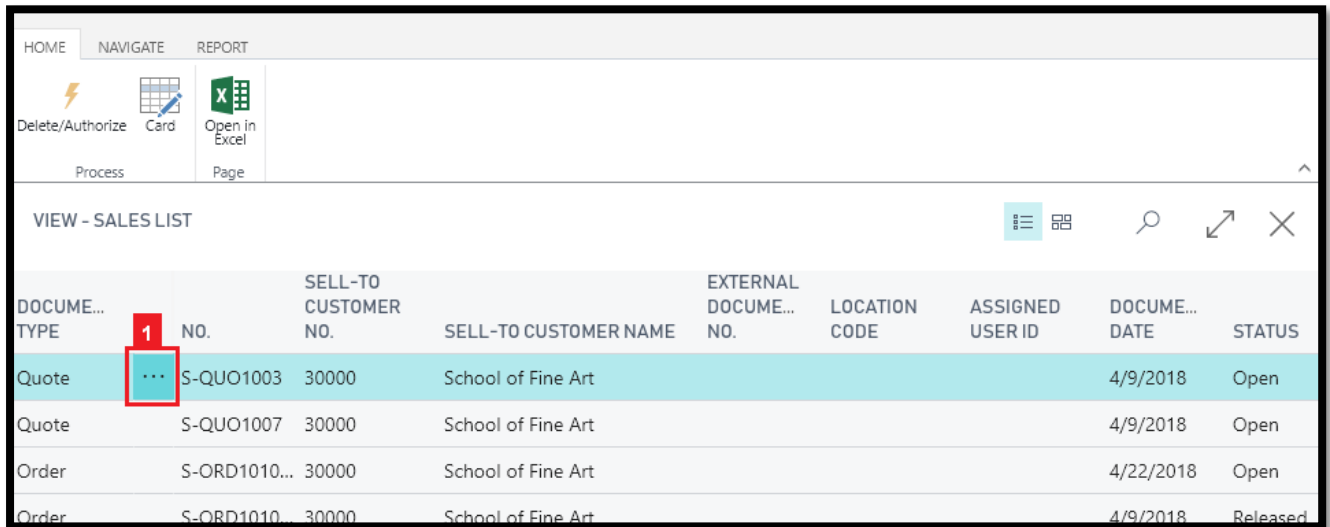
Field	Value
No.	30000
Name	School of Fine Art
IC Partner Code	
Balance (LCY)	100,435.00
Balance Due (LCY)	100,435.00
Credit Limit (LCY)	0.00
Blocked	Ship
Privacy Blocked	
Salesperson Code	

3. Take action on all documents

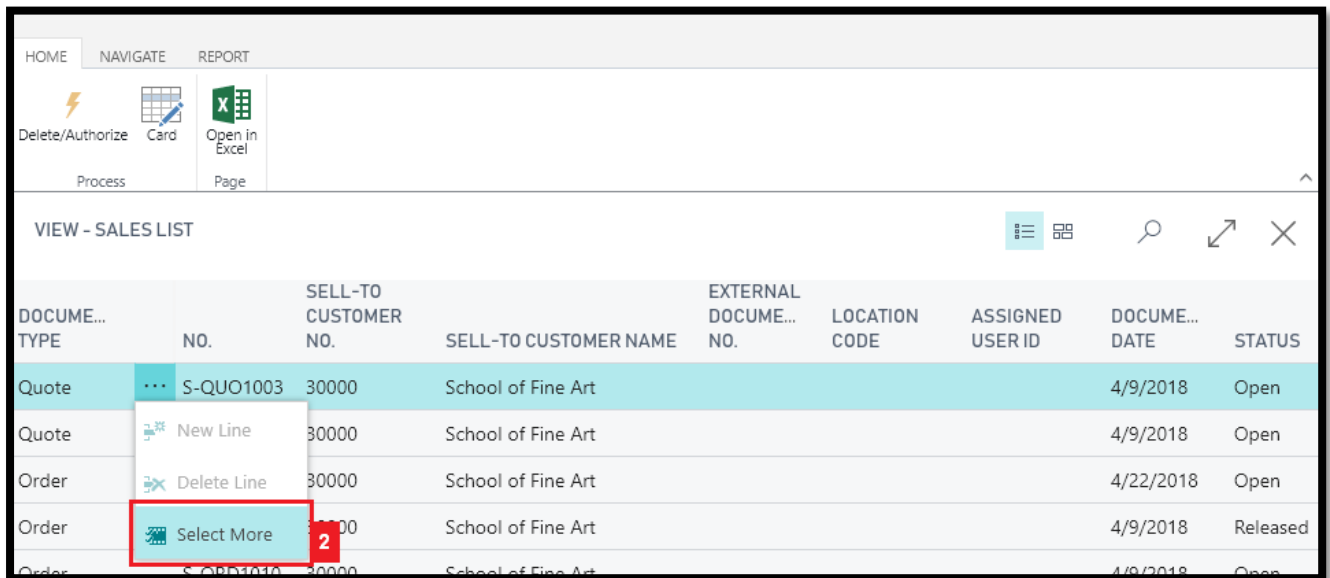
This section describes the steps to take the action for all document. An action needs to be selected before the status can be changed.

3.1. Take action for all documents — delete documents

1. Click on the ... to select more than 1 document at the time



2. Click on the **Select More** fields



3. Use the check box to select the documents that need to be deleted
4. Click on **Delete/Authorize** button

4 Delete/Authorize Card Open in Excel Process Page

VIEW - SALES LIST

3

DOCUME... TYPE	NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	EXTERNAL DOCUME... NO.	LOCATION CODE	ASSIGNED USER ID	DOCUME... DATE	STATU
<input checked="" type="checkbox"/> Quote	...	S-QUO1003	30000	School of Fine Art			4/9/2018	Open
<input type="checkbox"/> Quote		S-QUO1007	30000	School of Fine Art			4/9/2018	Open
<input type="checkbox"/> Order		S-ORD1010...	30000	School of Fine Art			4/22/2018	Open
<input type="checkbox"/> Order		S-ORD1010...	30000	School of Fine Art			4/9/2018	Releas
<input checked="" type="checkbox"/> Order	...	S-ORD1010...	30000	School of Fine Art			4/9/2018	Open
<input type="checkbox"/> Order		S-ORD1010...	30000	School of Fine Art			4/9/2018	Open
<input type="checkbox"/> Order		S-ORD1010...	30000	School of Fine Art	TEST MANU...		4/9/2018	Releas

5. Select the **Delete** option and click **OK**. As you can see, the selected orders have been deleted from the list

i Delete 5

Authorize

5 OK Cancel

HOME NAVIGATE REPORT

Delete/Authorize Card Open in Excel Process Page

VIEW - SALES LIST

DOCUME... TYPE	NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	EXTERNAL DOCUME... NO.	LOCATION CODE	ASSIGNED USER ID	DOCUME... DATE	STATUS
Quote	S-QUO1007	30000	School of Fine Art				4/9/2018	Open
Order	S-ORD1010...	30000	School of Fine Art				4/22/2018	Open
Order	S-ORD1010...	30000	School of Fine Art				4/9/2018	Released
Order	S-ORD1010...	30000	School of Fine Art				4/9/2018	Open
Order	S-ORD1010...	30000	School of Fine Art	TEST MANU...			4/9/2018	Released
Order	S-ORD1010...	30000	School of Fine Art				4/9/2018	Open
Order	S-ORD1010...	30000	School of Fine Art	12121213212 EAST			4/9/2018	Released
Order	S-ORD1010...	30000	School of Fine Art				4/9/2018	Released
Invoice	S-INV102202	30000	School of Fine Art				4/5/2018	Open

6. Click **close**.
If I try to close the list, the system won't let me do that because I didn't take action on all the documents of the list.
7. Click **OK**

HOME NAVIGATE REPORT

Delete/Authorize Card Open in Excel

Process Page

VIEW - SALES LIST

No action taken for these documents

DOCUME... TYPE	NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	EXTERNAL DOCUME... NO.	LOCATION CODE	ASSIGNED USER ID	DOCUME... DATE	STATU
<input type="checkbox"/>	Quote	S-QUO1007	30000	School of Fine Art			4/9/2018	Open
<input type="checkbox"/>	Order	S-ORD1010...	30000	School of Fine Art			4/22/2018	Open
<input type="checkbox"/>	Order	S-ORD1010...	30000	School of Fine Art			4/9/2018	Releas
<input type="checkbox"/>	Order	S-ORD1010...	30000	School of Fine Art			4/9/2018	Open
<input type="checkbox"/>	Order	S-ORD1010...	30000	School of Fine Art	TEST MANU...		4/9/2018	Releas
<input type="checkbox"/>	Order	S-ORD1010...	30000	School of Fine Art			4/9/2018	Open
<input type="checkbox"/>	Order	S-ORD1010...	30000	School of Fine Art	12121213212 EAST		4/9/2018	Releas
<input type="checkbox"/>	Order	S-ORD1010...	30000	School of Fine Art			4/9/2018	Releas
<input type="checkbox"/>	Invoice	S-INV102202	30000	School of Fine Art			4/5/2018	Open
<input checked="" type="checkbox"/>	Invoice	S-INV102203	30000	School of Fine Art			5/13/2018	Open

6 Close

i You must take action on all the displayed records.

7 OK

3.2. Take action for all documents — authorise documents

1. Click on the ... to select more than 1 document at the time

HOME NAVIGATE REPORT

Delete/Authorize Card Open in Excel

Process Page

VIEW - SALES LIST

DOCUME... TYPE	NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	EXTERNAL DOCUME... NO.	LOCATION CODE	ASSIGNED USER ID	DOCUME... DATE	STATUS
Quote	...	S-QUO1003	30000	School of Fine Art			4/9/2018	Open
Quote		S-QUO1007	30000	School of Fine Art			4/9/2018	Open
Order		S-ORD1010...	30000	School of Fine Art			4/22/2018	Open
Order		S-ORD1010...	30000	School of Fine Art			4/9/2018	Released

2. Click on the **Select More** fields

HOME NAVIGATE REPORT

Delete/Authorize Card Open in Excel

Process Page

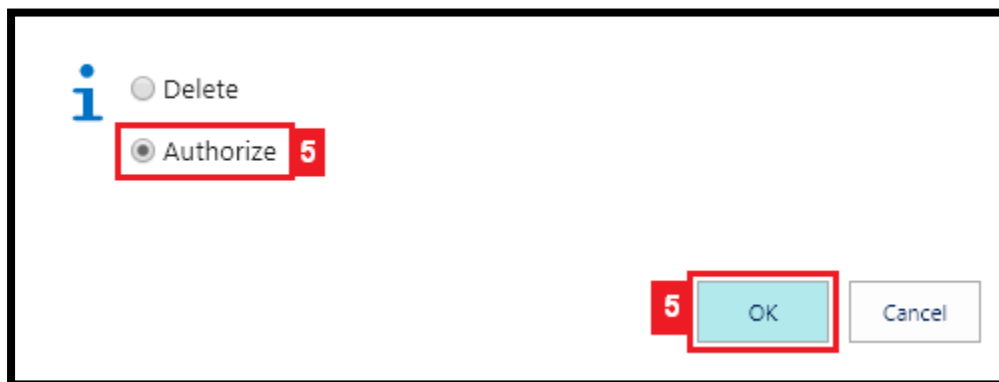
VIEW - SALES LIST

DOCUME... TYPE	NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	EXTERNAL DOCUME... NO.	LOCATION CODE	ASSIGNED USER ID	DOCUME... DATE	STATUS
Quote	...	S-QUO1003	30000	School of Fine Art			4/9/2018	Open
Quote	New Line		30000	School of Fine Art			4/9/2018	Open
Order	Delete Line		30000	School of Fine Art			4/22/2018	Open
Order	Select More		30000	School of Fine Art			4/9/2018	Released
Order		S-ORD1010...	30000	School of Fine Art			4/9/2018	Open

- Use the check box to select the documents that need to be deleted
- Click on **Delete/Authorize** button

DOCUME... TYPE	NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	EXTERNAL DOCUME... NO.	LOCATION CODE	ASSIGNED USER ID	DOCUME... DATE	STATU
Quote	S-QUO1007	30000	School of Fine Art				4/9/2018	Open
Order	S-ORD1010...	30000	School of Fine Art				4/22/2018	Open
Order	S-ORD1010...	30000	School of Fine Art				4/9/2018	Releas
Order	S-ORD1010...	30000	School of Fine Art				4/9/2018	Open
Order	S-ORD1010...	30000	School of Fine Art	TEST MANU...			4/9/2018	Releas
Order	S-ORD1010...	30000	School of Fine Art				4/9/2018	Open
Order	S-ORD1010...	30000	School of Fine Art	12121213212	EAST		4/9/2018	Releas
Order	S-ORD1010...	30000	School of Fine Art				4/9/2018	Releas

- Select the **Authorize** option and click **OK**. As you can see, the Orders 1006 and 104006 has been deleted from the list



- Click **Close**. As soon as the **Close** button is clicked, the status of the customer has been updated. For this example, the **Ship** status is shown

HOME NAVIGATE REPORT

Delete/Authorize Card Open in Excel

Process Page

VIEW - SALES LIST

DOCUME... TYPE	NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	EXTERNAL DOCUME... NO.	LOCATION CODE	ASSIGNED USER ID	DOCUME... DATE	STATU
Quote	S-QUO1007	30000	School of Fine Art				4/9/2018	Open
Order	S-ORD1010...	30000	School of Fine Art				4/22/2018	Open
Order	S-ORD1010...	30000	School of Fine Art				4/9/2018	Releas
Order	S-ORD1010...	30000	School of Fine Art				4/9/2018	Open
Order	S-ORD1010...	30000	School of Fine Art	TEST MANU...			4/9/2018	Releas
Order	S-ORD1010...	30000	School of Fine Art				4/9/2018	Open
Order	S-ORD1010...	30000	School of Fine Art	12121213212	EAST		4/9/2018	Releas
Order	S-ORD1010...	30000	School of Fine Art				4/9/2018	Releas
Invoice	S-INV102202	30000	School of Fine Art				4/5/2018	Open
Invoice	S-INV102203	30000	School of Fine Art				5/13/2018	Open

6 Close

EDIT - CUSTOMER CARD

30000 · School of Fine Art

General

No.	30000	Docume
Name	School of Fine Art	Total Sale
IC Partner Code		Costs (LC
Balance (LCY)	100,435.00	Profit (LC
Balance Due (LCY)	100,435.00	Profit %
Credit Limit (LCY)	0.00	CFDI Pur
Blocked	Ship	CFDI Rel
Privacy Blocked	<input type="checkbox"/>	Last Date
Salesperson Code	PS	

4. Change the status of the customer

If the customer status needs to be updated, the user can change it by selecting the appropriate status. The whole process (**Take action on all document**) will need to be done again if the status **Invoice** or **All** is selected.