End User Guide (View Order to Cash)

Createch 365

Microsoft Partner
Gold Gestion intégrée

Revision history

Version	Date	Revision Description	Prepared by
1.0	2016-12-12	First Version	The Createch group
1.1	2018-05-28		

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Objective User guide

The objective of this user guide is to present the report **View Order to Cash** to facilitate the research of the status of a sale order from its creation to the payment of the invoice. The report presents the Sales Order with quantity not transfer to an invoice.

1. Access the **View Order to Cash**

2. Analyze the information of the report and use the Drill Down function to access a specific document

   - Sales Order
   - Purchase Orders
   - Sales Shipments
   - Sales Invoices
   - Payments
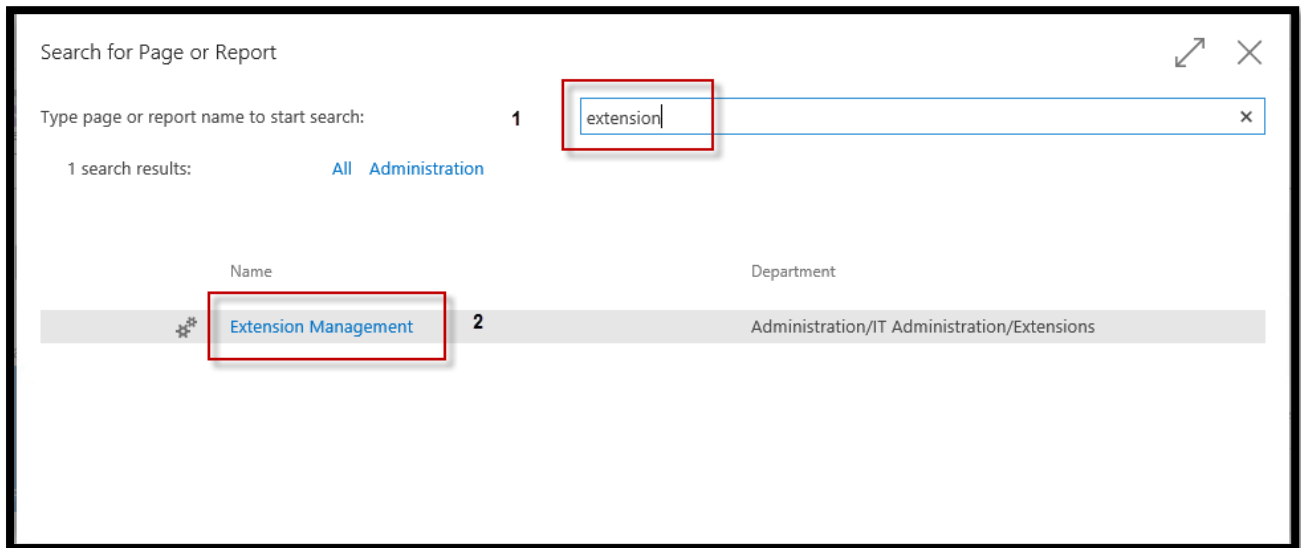
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1. Installation of the extension

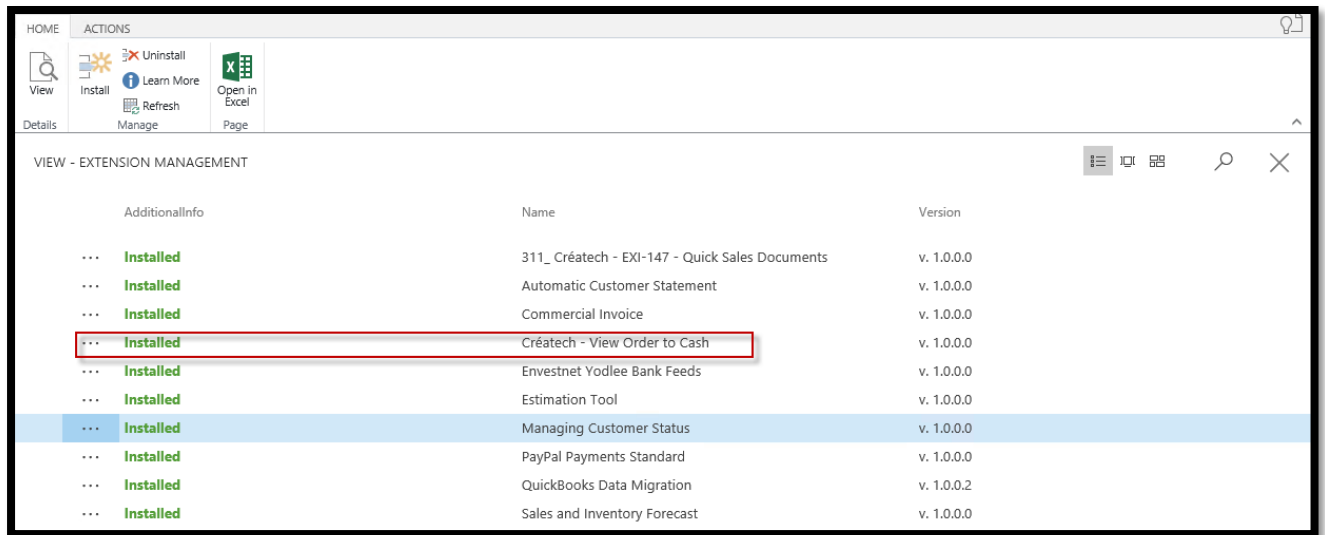Before using the app in Dynamics 365, please make sure if the extension is installed. You can follow these steps:

- Click on the search function from your home page
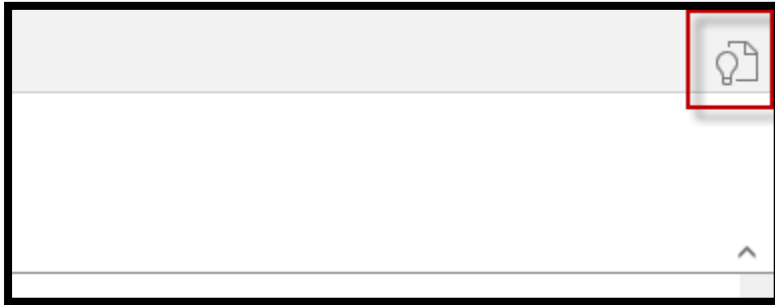
- The search page opens:
1- Enter extension in the search bar
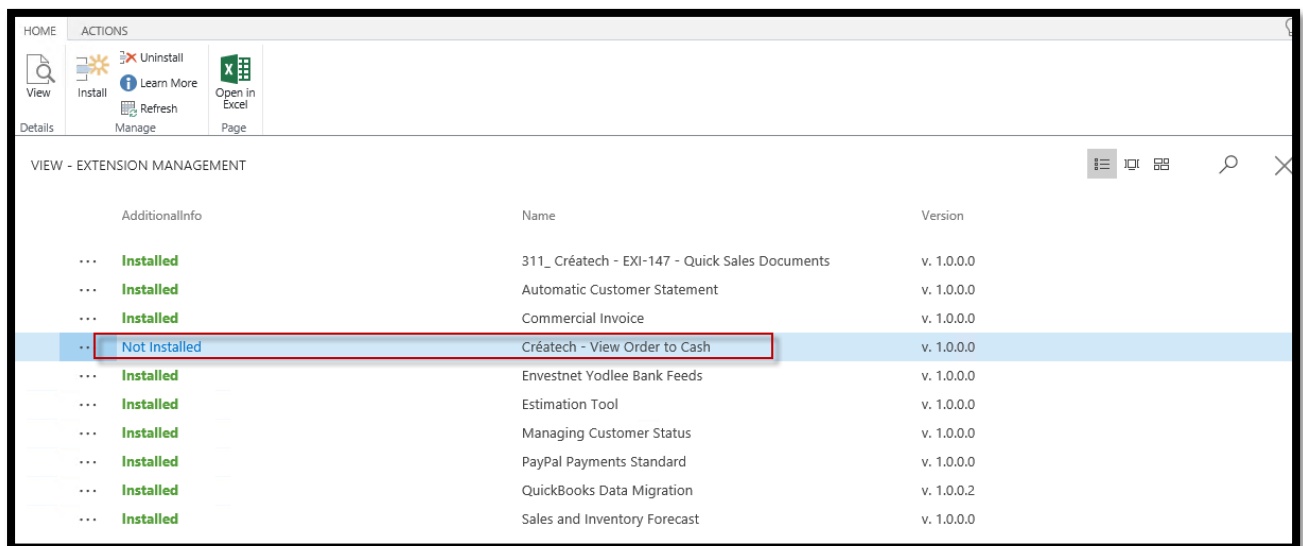2- Select the related item

The extension management page opens:

If the status of the related extension is installed, the extension is correctly installed.
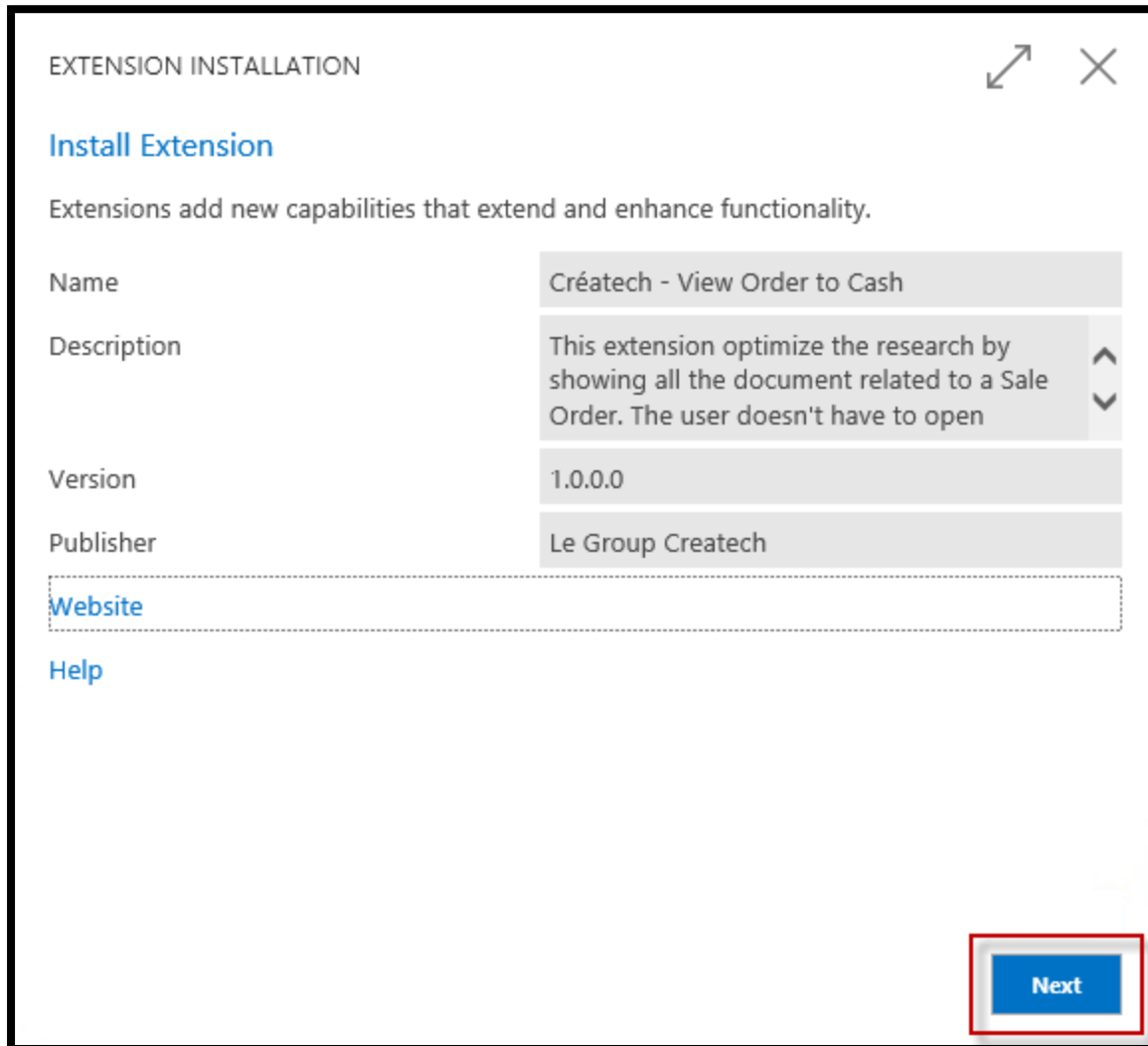
If it is Not Installed, you can:

- Click in the extension called "Managing Customer Status"

The Extension Installation Wizard opens:

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- Click on Next

EXTENSION INSTALLATION

Install Extension

Extensions add new capabilities that extend and enhance functionality.

Name	Créatech - View Order to Cash
Description	This extension optimize the research by showing all the document related to a Sale Order. The user doesn't have to open
Version	1.0.0.0
Publisher	Le Group Createch

Website
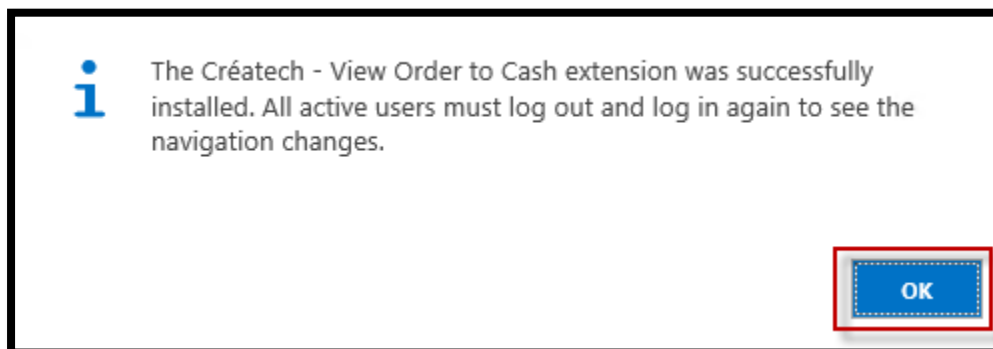
Help

Next

The next step of the wizard opens:

- Click on Install
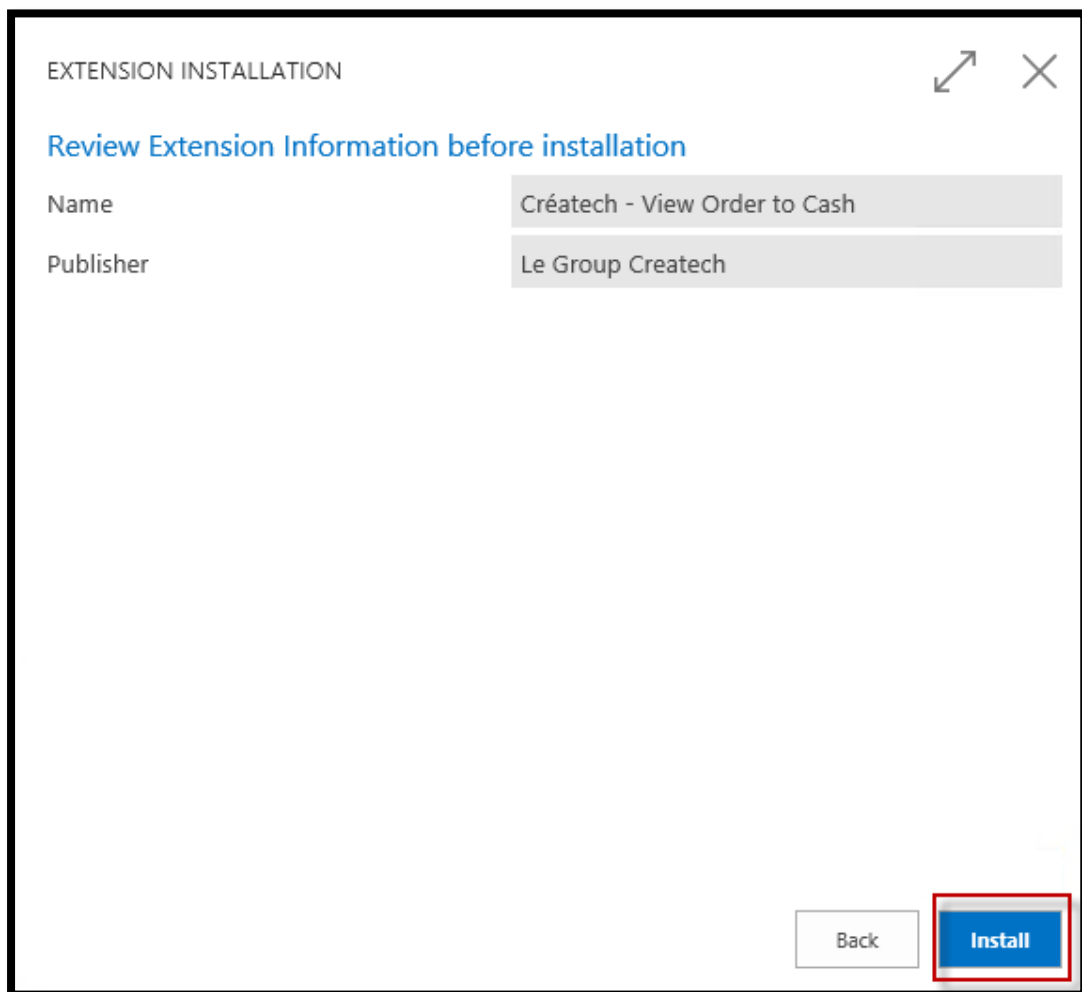
Click on OK.

The extension is correctly installed.

2. Access the report View Order to Cash

This section describes the steps to access the report.

The report is located in the **Home page (Sales Order Processor Rolecenter)** of the user. You can also search for the page "Order to Cash". The starting point of the report is the Sales Order No.

Each time a transaction is processed, the View Order to Cash updates the information so the user can have a quick overlook of the status of the sales order. When all the items of the Sales Order are attached to an invoice, the Sales Order No. will disappear from the report and the user will have to use a different process to analyze the information.

The user can follow all the transaction documents that are related to the Sales Order No.

- Purchase Order (by using the Drop Shipment process)
- Sales Shipments
- Sales Invoices
- Payments

3. Analyze the information of the report and access a specific document

On the View Order to Cash, all documents from the Sales Order to the Payments can be drilled down to see the document information. You will be able to see the number of posted documents related to the released sales order.

NO.		SELL-TO CUSTOMER NAME	SALES SHIPMENTS	SALES INVOICE	PURCHASE ORDER	PREPAYME..
Order to Cash						···
S-ORD101008	···	School of Fine Art	1	2	1	
S-ORD101012		Adatum Corporation	0	0	1	

Once you select what documents you would like to see, click on the number and a list of documents will be on the next page. You will then be able to select the document you would like to view if you choose to do so.