End User Guide (Quick Sales Documents)

Createch 365

Microsoft Partner
Gold Gestion intégrée

Revision history

Version	Date	Revision Description	Prepared by
1.0	2016-12-18	First Version	The Createch group

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Objective User guide

The objective of this user guide is to present the new Quick Sales Documents added to help users create Sales Document quickly.

1- Access the newly added Pages
2- Create a new document quickly
3- Use the newly added Factboxes
- Item Information Factbox
- Item Inventory Factbox
- Line Comments Factbox
4- Create related Purchase Documents
5- Access Related Purchase documents

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:

VIEW - EXTENSION MANAGEMENT

Installed	Installed	Installed
Créatech - Quick Sales Docum...	Créatech - View Order to Cash	Envestnet Yodlee Bank Feeds
v. 1.0.0.0	v. 1.0.0.0	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 "Créatech - Quick Sales Documents"

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The Extension Installation Wizard opens:

- Click on Next

Install Extension

Extensions add new capabilities that extend and enhance functionality.

Name	Créatech - Quick Sales Documents
Description	New simplified pages for Quick Sales Order and Quote will help the user create documents quickly. New Factboxes in the new
Version	1.0.0.0
Publisher	Le Group Createch

Website

Help

Next

The next step of the wizard opens:

- Click on Install

EXTENSION INSTALLATION

Review Extension Information before installation

Name	Créatech - Quick Sales Documents
Publisher	Le Group Createch
Language	English (United States) [...]

Back   **Install**

Click on Ok.

i The Créatech - Quick Sales Documents extension was successfully installed. All active users must log out and log in again to see the navigation changes.

OK

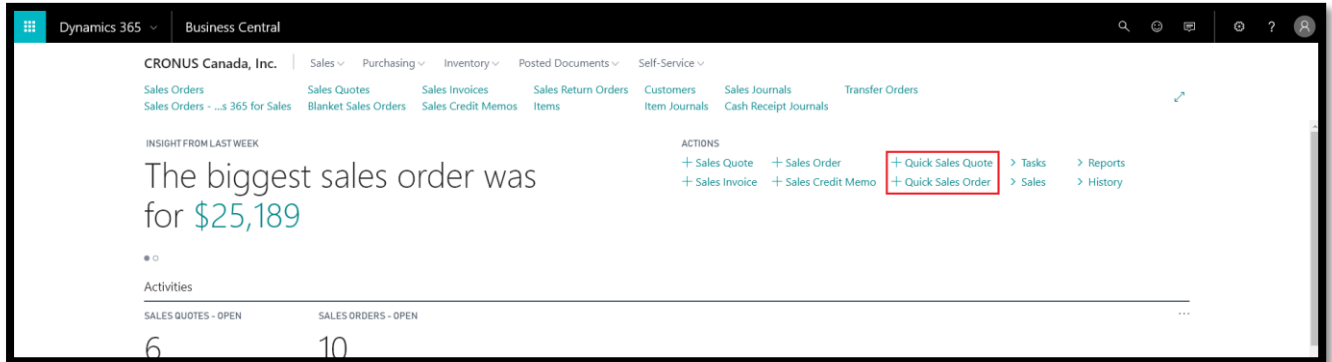The extension is correctly installed.

VIEW - EXTENSION MANAGEMENT

Installed	Installed	Installed
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2. Access newly added pages

New pages are accessed from the Role Center. Two new buttons were added under Actions.

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3. Create a new document quickly

Once pressed, the related page will open with a new document being created, and a document number being assigned
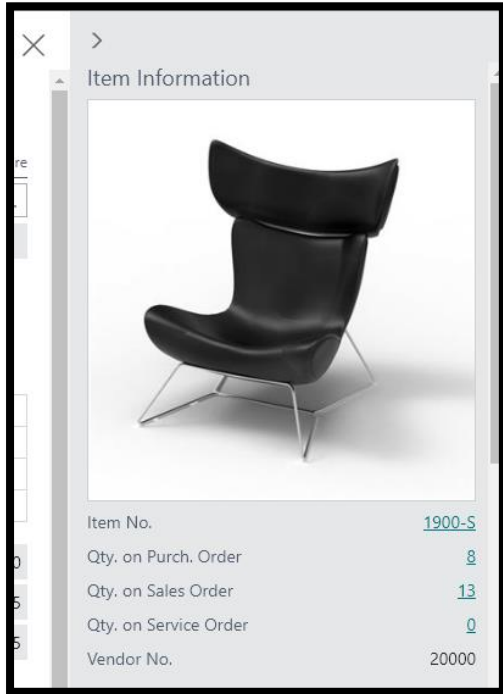

The fields sequence will be the following:

1- Customer No.
2- Requested Delivery Date
3- Item No.
4- Quantity
5- Unit Price

After this sequence, a new line with Type Item is created and the cursor will be on the Item Number field.

Creating a new document will also assign a new Document Number and set the cursor on the Customer No. field.

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4. Use the newly added Fact boxes

Item Information Factbox will display the Item photo, and some other info related to the selected Item, allowing the user to better identify the selected Item and access related info quickly.

Item Inventory FactBox will display the availability of the selected Item in each warehouse.
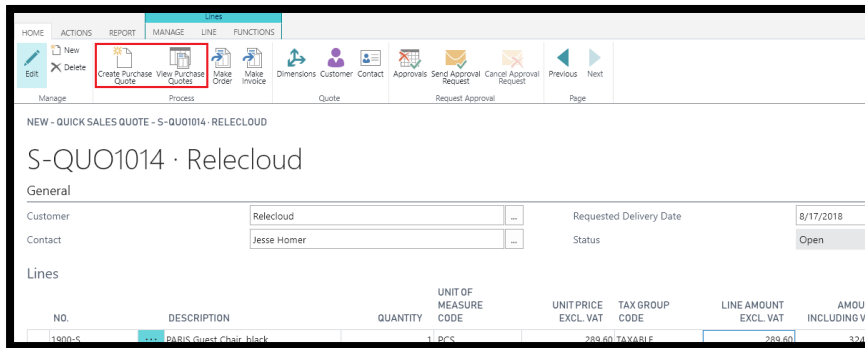
5. Create related Purchase Documents

While selecting a new Item on the Sales Line, related Vendor from the Item Card will be automatically added to the line. The user can change the Vendor No.

Click the Create Purchase Quote button and a new document will be created for each Vendor

6. Access Related Purchase documents

The View Purchase Quotes button will open the list of related Purchase Documents created.

In this list, related Lines will be shown in the Purchase Lines factbox

The user can open the Purchase Document directly from the Card button.