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1. Welcome

Welcome to this companion guide for SMARTIFY 365 vertical solution. Within this guide, you’ll be shown how to use SMARTIFY 365 App in MS D365 instance.

2. About Sysfore

Sysfore is the first Microsoft Gold Partner on Azure and one of the early AWS certified partners in India, with a dedicated focus on modern apps and cloud managed services. With rich breadth and depth of experience and expertise in enabling customers onto the cloud-based offerings, Sysfore has delivered over 100’s of engagements for customers to ensure their success. Sysfore’s strong product engineering team focus on developing dynamically scalable cloud-ready web and mobile apps. Sysfore Cloud Managed Services offers 24*7 support services for subscribed customers, for managing their various cloud infrastructure. Sysfore uses Microsoft Dynamics 365 to help customers grow their business multi-fold by effectively positioning their offerings coupled with the right value.


3. Introduction

SMARTIFY 365 is a vertical Solution built on top of Dynamics 365 Customer Engagement platform. This is targeted towards managing small to medium business distribution network spread across different locations, handling high value products (not the typical retail customer), primarily aimed at the engineering, manufacturing, medical equipments, automation, quality and product testing, benchmarking, etc.

The product would help businesses in quickly managing many of the departments operations effectively from the central application, clearly defining the various users and roles. Some of the key modules and features are as below;

- Sales engagement, which includes lead, opportunity, quotation and order management.
- Warranty Management, which includes SLA, entitlements, renewals, applicable for the customer. Assist in managing Annual Maintenance Contracts and billing.
- Service management, which includes ticket management, resolution tracking, regular communication, time sheet management, assist in managing customer service engagements more structured and timely.
- Work Order Management includes Installation work orders to help the installation team to fulfil the orders and service work orders for the service team to close the customer support cases under warranty or AMC.
- Country specific localization (GST for India) available to handle customer invoicing. Extending the CRM capabilities to utilise for customer invoicing and track the receivables.
4. Subscription Activation

Subscription activation is available in D365 configuration page. Two types of activations are available. They are Trial and Subscribe.

Below screenshot describes about subscription activation.

![Subscription Activation Screenshot](image)

4.1 Field Explanation

**Customer Information**: First Name, Last Name, Email and Phone No.

**No of Users**: The total number of users who are accessing immediate sync process.

**Valid From and To**: Between “from” and “to” date, the license validity will be available.

**Days**: Total number of license validity days.

**Status**: There are 3 types of License Status. Below is the explanation about status.

i) **Pending**: During Subscribe and Renewal activation request, the status will be pending.

ii) **Activated**: Once the license is activated, the status will be activated. It means that the sync process can be able to access.

iii) **Expired**: License validity expiry status.

**Subscription Key**: Subscribe or renewal activation key must be pasted here for the activation process.

**Process Buttons**: There are 4 types of process buttons. Below is the explanation of process.

i) **Trial**: 30 days validity from “valid from” date.

ii) **Subscribe**: Default 1 year validity from “valid from” date. Otherwise request for particular date range.

iii) **Renewal**: Once the validity expires, customer can request for renewing the license.
iv) Activation Key: Once the license is activated, the activation key will be sent to the customer mail Id. This key should be pasted to the subscription key field and activate the license.

4.2 License Activation Steps

3.2.1 Trial Activation

Customer details are required for license activation. Default valid from is current date. The customer can change the valid from date. When processing trial action, valid to, number of days and status will be automatically displayed.

Below Screenshot explains about Trial activation.
The above data is enough for trial activation. Once the Trial is activated, the data will be as shown below.

3.2.2 Subscribe Activation

Subscribe activation can occur in two ways. Before Trial, one can directly activate the Subscription or in case of expiry of Trial license expired, subscription can be done. Below screenshot describes about this.

If Valid To is not defined, default 1-year license will be activated. Otherwise, depending upon the selected Valid To the validity day will be calculated and status will be as Pending.
The request will go to Sysfore Apps Team and once the license is activated, the subscription key will be sent to the customer mail. The customer can use the subscription key and activate the license. Below screenshot explains about activation of license by using subscription key.

After activated the license, the data will be as shown below. The status will be changed as activated. If the key is not proper or in case of any other issue, the status will be as pending only.
3.2.3 Renewal Activation

The customer can select the “Valid From” and “Valid To” and request for Renewal activation. The request will be pending status. The request will go to Sysfore Apps Team. The customer will get license key through mail for activating the license.

5. Custom Entities

SMARTIFY 365 has 8 custom entities. They are Warranty Model, Warranty Periods, Warranty Order Products, Warranty policies, Tax rates, Sysfore License log, Product category and Brand.

5.1 Warranty and Tax Menu items

Below screen shots shows the menu items about warranty and tax related custom entities included in the solution.
5.2 Warranty Model

Warranty model is a new entity which allows to define different warranty model in the system like Gold, Silver, Platinum etc. warranty models as per the organization warranty model.

Warranty product price is calculating depending upon cost percentage defined in warranty model. Sale product unit price is using for this cost calculation.

While creating case for sold product, depending upon SLA, the case could have handled if it has warranty product. In case, SLA is selected automatically depending upon warranty model definition.

![Warranty Model Table]

5.3 Warranty Policies

Warranty policies is a new entity which allows to define warranty terms and conditions definitions as per the organization. The warranty policies can define at warranty model level.

Warranty Policy terms and conditions is fetching automatically while selecting warranty product in the quote product lines.

![Warranty Policies Table]
5.4 Warranty Periods

Warranty periods is a new entity which allows to define warranty periods like 1 year, 2 year, 5 year, 18 months etc. as per the organization. The warranty periods can define at product level based on warranty model.

<table>
<thead>
<tr>
<th>Name</th>
<th>Years</th>
<th>Months</th>
<th>Created On</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Year</td>
<td>2</td>
<td>4</td>
<td>10/6/2018 10:37 AM</td>
</tr>
<tr>
<td>10 Years</td>
<td>10</td>
<td>0</td>
<td>10/6/2018 10:37 AM</td>
</tr>
<tr>
<td>2 Months</td>
<td>0</td>
<td>2</td>
<td>10/6/2018 10:37 AM</td>
</tr>
<tr>
<td>5 Years</td>
<td>5</td>
<td>0</td>
<td>10/6/2018 10:37 AM</td>
</tr>
</tbody>
</table>

5.5 Warranty Order Products

Warranty order products is a new entity which keeps track of all warranty order products details with warranty details like start date, end date, warranty expiry, warranty renewal history etc.

While granting warranty for sales order products, warranty order products are creating dynamically and generating serial number with ProductName_OrderNumber.

Order Fulfill date is taking as Dispatch date. Depending warranty model period, validity end date is calculating.

Default status is “Valid”. If validity is end, the status is changed as “Expired”. While renewing warranty the status will be changed as “Pending for renewal”. During this time, opportunity is creating. Once the sales order is fulfilled for related this opportunity, the status will be “Valid” and Warranty history of previous start and end date will be created.
### Active Warranty Order Products

<table>
<thead>
<tr>
<th>Serial Number</th>
<th>Product</th>
<th>Order</th>
<th>Potential Customer</th>
<th>Warranty Model</th>
<th>Dispatch Date</th>
<th>Start Date</th>
</tr>
</thead>
</table>

### Warranty Order Product: INFORMATION

**Laptop_ORD-01018-J4G5P1**

#### General

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Serial Number</td>
<td>Laptop_ORD-01018-J4G5P1</td>
<td></td>
</tr>
<tr>
<td>Product</td>
<td>Laptop</td>
<td></td>
</tr>
<tr>
<td>Warranty Model</td>
<td>Silver</td>
<td></td>
</tr>
<tr>
<td>Potential Customer</td>
<td>Janaki Ram Enterprise</td>
<td></td>
</tr>
<tr>
<td>Order</td>
<td>HRMS Demo</td>
<td></td>
</tr>
<tr>
<td>Dispatch Date</td>
<td>10/25/2018</td>
<td></td>
</tr>
<tr>
<td>Start Date</td>
<td>10/25/2018</td>
<td></td>
</tr>
<tr>
<td>End Date</td>
<td>12/25/2018</td>
<td></td>
</tr>
</tbody>
</table>
5.6 Time Sheet

Time sheet is a new activity entity which helps the users to capture time sheet entries against the entities.

5.7 Tax Rate

Master Definition of GST/IGST and non-GST tax rate percentage must be defined in Tax Rate Record. CGST, SGST and IGST percentages are calculating separately depending upon total percentage.

Below screen shot explain about the attribute contains in Tax Rate Entity.
5.7.1 Field Description

Name : Tax rate identification name
Is GST : Value True is GST tax and False is Non- GST tax
Is IGST : Value True is IGST tax and False is Non- IGST tax
Percentage : Total tax percentage
CGST : Percentage of CGST holding in total percentage
SGST : Percentage of SGST holding in total percentage
IGST : IGST of total tax percentage.

5.7.2 Notification

GST and IGST tax can’t be configured together. The system will show the notification. If GST and IGST values are false, it will consider as non- GST Tax.

Below Screen shot describes the error notification if GST and IGST configure together.
5.7.3 Percentage Calculation

Depending upon the selection of GST and IGST, the percentage holding for CGST, SGST and IGST will be calculated automatically.

5.7.3.1 GST Calculation

The percentage value divided by 2 is for CGST and SGST. IGST will be zero. Below screen shot will be explained the tax percentage calculation in Tax Rate record.

5.7.3.2 IGST Calculation

The percentage value will be same for IGST. CGST and SGST will be zero.
5.7.3.3 Non-GST Calculation

The percentage will be taken directly for tax calculation. CGST, SGST and IGST will be zero.

5.8 Product Category

Product has product category. Product category data definition can be done by using this entity.

5.9 Brand

Product has brand definition. Brand data definition in this entity. Brand has more than models. In product depending upon the Brand selected, the model will be filtered.
5.10 Sysfore License Log

License log capturing the license activation information. During creation of sales transactions, license is not activated or expire, it will notify through this license log.

Find below the screenshot
6. Warranty Model and Tax Definition in Product Master

Tax and Warranty Model can be configured for each Product separately. During the selection of product in Opportunities, Quotes, Order and Invoice line, the tax amount will be calculated depending upon the tax defined in the product master.

More than one warranty model can integrate to each product. During quote creation, depending upon the selected product, these warranty models will be filtered.

The warranty product will be created as new line with warranty cost percentage calculated amount by using product unit price.

Below screen shot will show the warranty model and tax rate configuration in Product.

7. GST TIN Number definition

GST TIN number definition is capturing in Business unit and account. Find the screen shot below.
8. Warranty and Tax Configuration in Sales Transactions

8.1 Warranty and Tax Product Configuration

While selecting the product, if tax rate integrated to particular product, the tax rate will be calculated depending upon the line discounted base amount. Tax rate percentage is the total percentage of tax rate. If Sysfore GST 365 license is not activated, GST tax won’t be calculated.
If any warranty model is integrated for the selected product, the warranty product will show the related warranty models. Depending upon the selected warranty model, the warranty cost will be calculated automatically and a new quote product line will be created with the calculated cost.

If the sold product price or quantity modified, the warranty cost will be calculated depending upon the price and the same quantity will be updated warranty product.

Find below the screenshot explains the line tax calculation and warranty product selection.
9. Warranty and Tax Flow

Tax amount carrying in the Sales transaction flow from Opportunity product line to Invoice product line. Tax rate can be integrated in any stage of Sales transaction. It can be started from Opportunity or Quote or Order or directly can be assigned in Invoice.

Below screen shot describe the amount flow in the transaction records.

1. Opportunity Line

![Opportunity Line Screenshot]

2. Quote

![Quote Screenshot]
3. **Order**

![Order Screen]

**General**
- Select Product: Existing
- Existing Product: Laptop

**Pricing**
- Use Default
- Price Per Unit: ₹1,000.00
- Volume Discount: 10%
- Quantity: 1.0000
- Amount: ₹1,000.00
- Manual Discount: ₹0.00
- Tax: ₹100.00

**Invoice**

![Invoice Screen]

**General**
- Select Product: Existing
- Existing Product: Laptop

**Pricing**
- Use Default
- Price Per Unit: ₹1,000.00
- Volume Discount: 10%
- Quantity: 1.0000
- Amount: ₹1,000.00
- Manual Discount: ₹0.00
- Tax: ₹100.00
10. Case

Case is an existing entity which we customized to incorporate warranty supports based on warranty order products.

10.2 Case with Time Sheet

Time sheet activity entity is integrated in case entity to capture time sheet entries for each case record.
11. **Convert Order to Work Order**

Order is an existing entity and we added a feature to convert order to work order for installation activity.

12. **Grant Warranty on Order Products**

Grant warranty is a feature incorporated at order entity to fulfill the warranty order details along with the product.
Once warranty granted, the warranty product lines will be created in Warranty order products with below screen shot details.

13. Warranty Renewal

Warranty renewal is a feature which allows to renew the expiry or going to expire the existing warranty products. The system will create an opportunity with warranty service items for renewals.
13.1 **Opportunity for renew product**

Below mentioned screen shot shows the system generated opportunity from warranty order products for renewal.

![Screen shot of warranty renewal opportunity](image1.png)

![Screen shot of order line information](image2.png)
13.2 Warranty Expiry History

Warranty expiry entity will keep track of warranty order products which are expired with all related data.

Once the renew warranty sales order fulfilled, the warranty status will be updated as “Valid” and start date, end date will be changed depending warranty model period.

The previous start and end date and renewal order which the warranty is renewed is capturing in the warranty history.

The transaction data for renewal of particular product will be shown as subgrid data. The Opportunity, Quote and Sales order transactions have the details of renewal warranty product name, warranty price and quantity related record name.
14. Reports

9.1. Quote Reports

Quote wise can generate report in PDF and Excel Format. Two buttons are added for generating PDF and Excel report separately

Find below the screen shot for the reference

Below screen shot describe the PDF format output of quote report
Below screen shot describe the Excel format output of quote report

<table>
<thead>
<tr>
<th>ST. No</th>
<th>Product Name</th>
<th>Product Description</th>
<th>HSN/SAC</th>
<th>Qty</th>
<th>Unit Price</th>
<th>Discount</th>
<th>CGST</th>
<th>SGST</th>
<th>IGST</th>
<th>GST 18%</th>
<th>Tax</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>AMC</td>
<td></td>
<td></td>
<td>1.00</td>
<td>1,000.00</td>
<td>0.00</td>
<td>90.00</td>
<td>90.00</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
<td>1,900.00</td>
</tr>
<tr>
<td>2</td>
<td>Data Storage</td>
<td></td>
<td></td>
<td>1.00</td>
<td>2,000.00</td>
<td>0.00</td>
<td>90.00</td>
<td>90.00</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
<td>180.00</td>
</tr>
<tr>
<td>3</td>
<td>Software Maintenance</td>
<td></td>
<td></td>
<td>1.00</td>
<td>3,000.00</td>
<td>0.00</td>
<td>90.00</td>
<td>90.00</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
<td>3,540.00</td>
</tr>
</tbody>
</table>

Total: 0.00 | 580.00 | 580.00 | 0.00 | 820.00 | 6,080.00

With Warm Regards

9.2 Monthly GST Tax Report

Monthly GST Tax report explains about between the particular date range, based on HSN/SAC code the relevant GST tax details will be generated.

This report is integrated with Order entity. Find below the screen shot explain about execution of report.
It will be consolidated all the order product with group by HSN/SAC code and generating the report between the particular date range.

Find below the screen shot of the Monthly GST Tax report

![Monthly GST Tax report screenshot]

15. **Contact us for support**

For any further assistance or enquiries, please contact us at:

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