



Installation Guide

triomis vat calculator for Dynamics 365

Dortmund
06.10.2017

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1 Solution Installation

1.1 Prerequisites

CRM Online: CRM Online fulfills all prerequisites.

CRM On Premise (Server installation): You need the sandbox service installed and running on your CRM server. Ensure started sandbox by typing following command in the command line:

```
net start mscrmsandboxservice
```

1.2 Installation

In Dynamics 365 Sales the installation of and especially the customizing have been improved extremely, which will reduce implementation and operating costs. One of the many improvements is the managed solution.

Solutions in Microsoft Dynamics 365 Sales are a new method for saving customizations and to release the customizations for other users. You might play with a solution, can create or import a solution, which was created by a developer outside of your organization. A solution can be easily shared with other users. A managed solution can only be edited by certain users. An unmanaged solution can be edited by any user, unless he has the required user role. A solution may have a version number, entities and relationships to other components as well as security features based on user roles.

trionis vat calculator for Dynamics 365 Sales is such a managed solution. Except for the tax rates that are managed in an options set, you have no way to change or extend the solution.

There are three ways to install the solution:

1. Direct from Microsoft AppSource Marketplace
2. Deploy packages using Dynamics CRM Package Deployer and Windows PowerShell
3. Dynamics 365 Web-Fontend

1. AppSource

If you install the solution directly from AppSource, the solution will be automatically provided in your Dynamics instance. You have to install the solution for each of your instances from Dynamics 365 admin center.

Installation Guide

Ihre Lösungen verwalten



Ihre Lösungen verwalten

Wählen Sie eine bevorzugte Lösung aus, die Sie auf der ausgewählten Instanz verwalten möchten: **ms-cent-pre0113**

LÖSUNGSNAME	VERSION	VERFÜGBAR BIS	STATUS
AttachmenttoSharepoint	201516.62016.0.12	01.01.2050	Installiert
Außendienst-Service	6.2.1.38	01.01.2050	Nicht installiert
Company News Timeline	1.0.1.0	31.12.2050	Nicht installiert
Office 365 Groups	2.7.0.0	01.01.2050	Nicht installiert
Projekt-Service-Automatisi...	1.2.1.56	01.01.2050	Nicht installiert
triomis CRM CopyEntity	8.1.0.0	01.01.2099	Installiert
triomis VatCalculation for...	8.2.170929.10	01.01.2099	Installiert

Projekt-Service-Auto...



INSTALLIEREN

Microsoft Dynamics 365 für Projekt-Service-Automatisierung ist eine End-to-End-Lösung, die Vertriebs- und Lieferteams bei der Kundenbindung und pünktlichen Bereitstellung fakturierbarer ... [\(mehr\)](#)

Erstellt von: Microsoft
[Weitere Informationen](#)



2. PowerShell Installation

You will find general information here:

<https://technet.microsoft.com/en-us/library/dn647420.aspx>.

Unzip the downloaded VatCalculator packet. You will find the Dynamics solution packet VatCalcCrmPackage.zip in your unzip directory.

The Package Deployer tool also provides Windows PowerShell support to deploy packages. Perform the following steps to use the PowerShell cmdlets to deploy packages:

[Prerequisites](#)

[Register the cmdlets](#)

[Use the cmdlet to retrieve packages](#)

[Use the cmdlet to connect to your Dynamics 365 instance](#)

[Use the cmdlet to deploy packages](#)

[Get detailed help on cmdlets](#)

Copy VatCalcCrmPackage.zip to c:\CRM\SDK\Tools\PackageDeployer

The following command deploys a package, disassembles the package in the c:\UnpackedFiles folder, and records information to a log file in the c:\MyLogFiles folder.

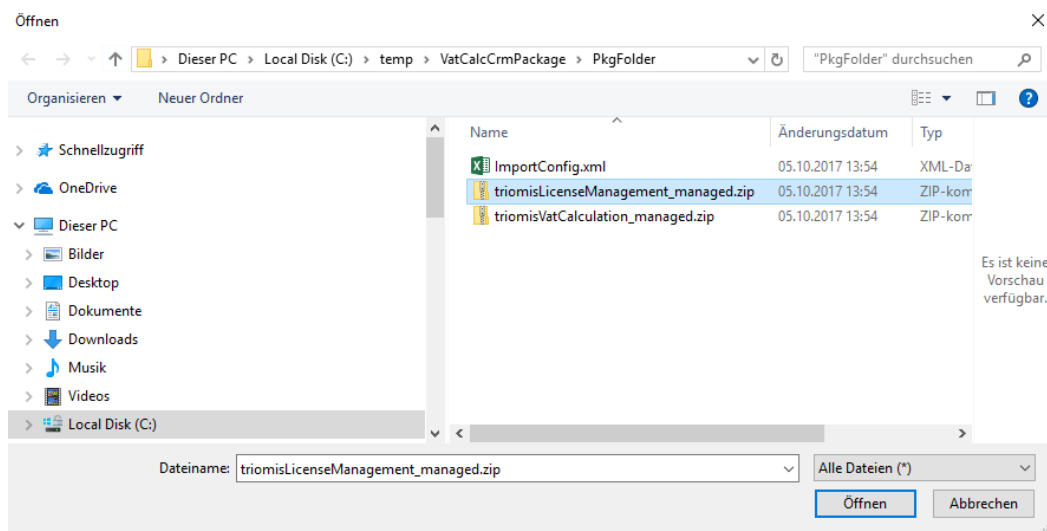
```
Import-CrmPackage -CrmConnection $CRMConn -PackageDirectory  
c:\CRM\SDK\Tools\PackageDeployer -PackageName VatCalcCrmPackage
```

3. Dynamics 365 Web-Fontend

To install the solution you log in as an administrator and navigate to the Settings area - Customization - Solutions.

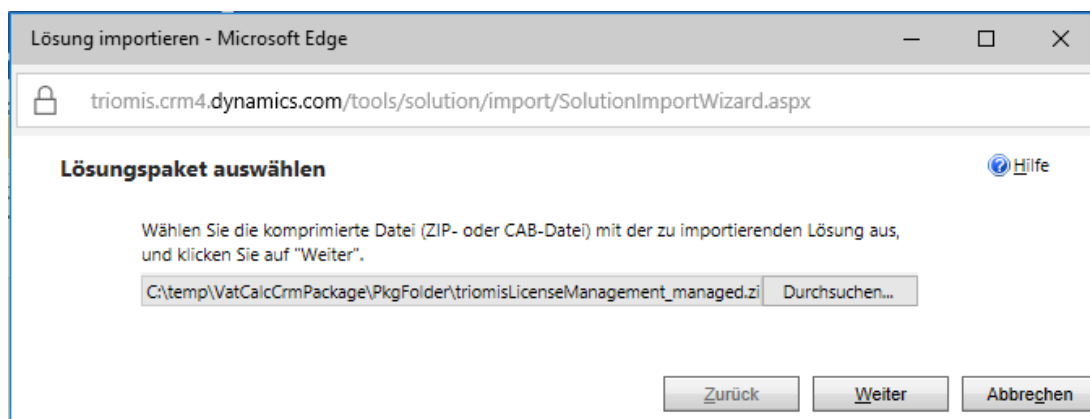
Installation Guide

Unzip the downloaded VatCalculator packet. In your unzip folder you will find the solution packet VatCalcCrmPackage.zip. This Zip contains a folder PkgFolder, where you find two Dynamics solutions.



The license manager triomisLicenseManagement_managed.zip and the VAT solution triomisVatCalculation_managed.zip. First you should install the license manager. Install the VAT calculator in the same way.

To start click the "Import" button. The following dialog appears:



Click the "Browse" button and choose the solution package for the triomis licence manager. Then you will see the information about the solution.

Installation Guide


Lösungsinformationen

 Hilfe

Lösungsinformationen

Name: triomis License Management
Herausgeber: triomis GmbH(triomisgmbh)
Pakettyp: Verwaltet

[Details zum Lösungspaket anzeigen](#)

 Durch Aktivieren dieses Befehls erklären Sie sich mit der Freigabe Ihrer Daten für ein externes System einverstanden. Daten, die aus externen Systemen in Microsoft Dynamics 365 importiert werden, unterliegen unseren [Datenschutzbestimmungen](#). Weitere Informationen finden Sie in der technischen Dokumentation.

Click on "next". In the next dialog, select the check box to enable the solution steps.


Lösungsinformationen

 Hilfe

Lösungsinformationen


















Name: triomis License Management
Herausgeber: triomis GmbH(triomisgmbh)
Pakettyp: Verwaltet

[Details zum Lösungspaket anzeigen](#)

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After the solution has been imported, it appears in the solutions in customization area. Please ignore the warning about missing language packets.

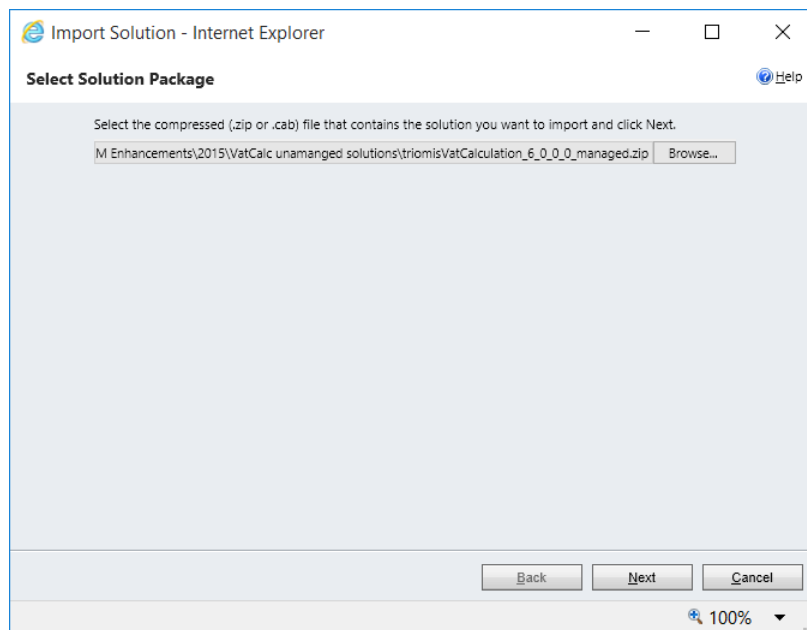
Lösung wird importiert...

Warnung beim Importieren der Lösung "triomis License Management".						
Datum/Uhrzeit	Typ	Anzeigenname	Name	Status	Beschreibung	Detaill ↑
12:10:40.37	Beschriftungen	Beschriftungen			Anzeigezeichenfolgen und lokalisierte Beschriftungen.	Die übersetzten Beschriftungen für die folgenden Sprachen...
12:10:50.05	Systemansichten	App Account	triomis_appacco...		In der Datenbank gespeicherte Abfrage.	Keine
12:10:52.06	Formular	App License	triomis_applicen...		Vom System aufgefülltes Feld für die XML-Darstellung de...	Keine
12:10:51.41	Entitätsmeldung...		triomis_appacco...		Angepasste Meldungen für eine Entität.	Keine
12:10:51.41	Formular	App Account	triomis_appacco...		Vom System aufgefülltes Feld für die XML-Darstellung de...	Keine
12:10:41.86	Webressource (j...	LicenseManager...	triomis/_License...			Keine
12:10:41.80	Webressource (j...	LicenseManager...	triomis/_License...			Keine
12:10:47.75	Systemansichten	App License	triomis_applicen...		In der Datenbank gespeicherte Abfrage.	Keine
12:10:47.56	Systemansichten	App Account	triomis_appacco...		In der Datenbank gespeicherte Abfrage.	Keine
12:10:50.14	Systemansichten	App License	triomis_applicen...		In der Datenbank gespeicherte Abfrage.	Keine
12:11:00.28	SDK-Nachrichte...	Update - App Li...	Update - App Li...			Keine
12:10:59.98	Plug-In-Assembly	CrmLicenseMan...	CrmLicenseMan...			Keine
12:11:04.16	Abhängigkeits...					Keine
12:11:07.67	SDK-Nachrichte...	Update - App Li...	Update - App Li...			Keine
12:10:52.28	Diagramm		triomis_applicen...		Entität zum Speichern eines Diagramms, das einer Ansicht...	Keine
12:10:52.20	Entitätsmenüband	App License	triomis_applicen...		XML-Daten für die angepassten Elemente der Menüband...	Keine
12:10:52.08	Entitätsmeldung...		triomis_applicen...		Angepasste Meldungen für eine Entität.	Keine

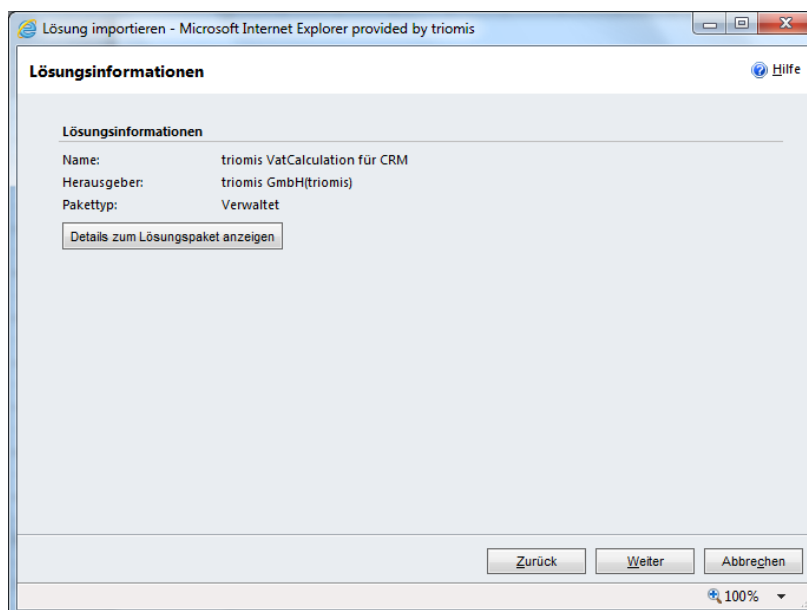
H < Seite 1 >

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So the same procedure with the second solution packet `triomisVatCalculation_managed.zip`. To start click the "Import" button. The following dialog appears:

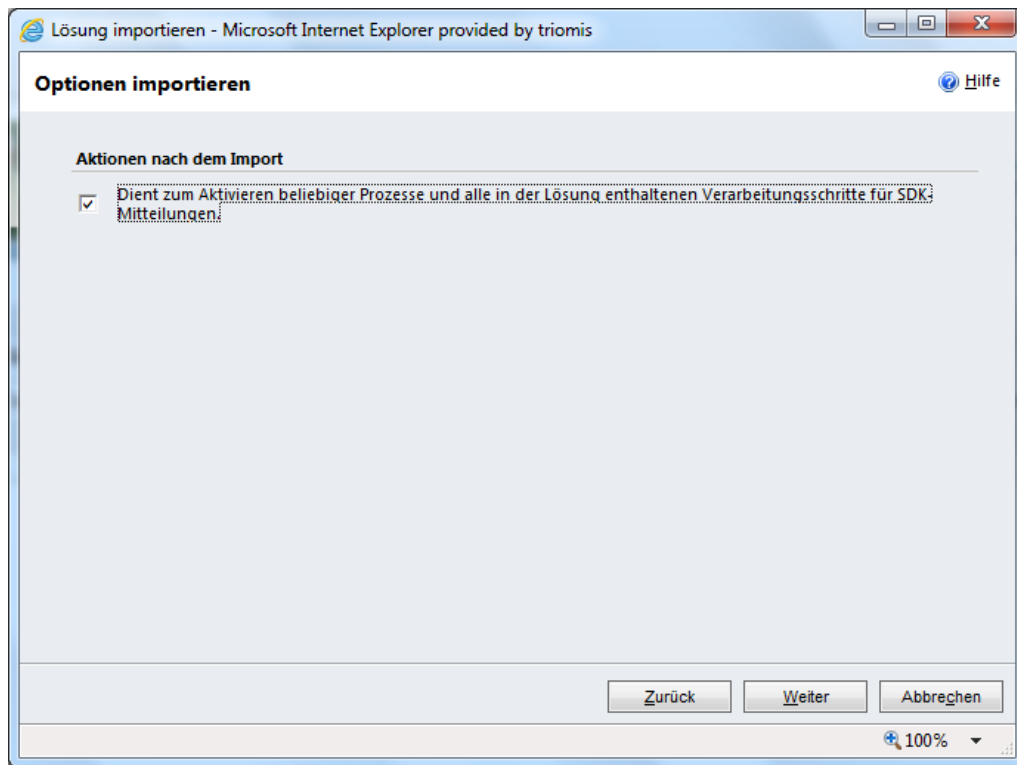


Click the "Browse" button and choose the solution package for the triomis vat calculator. Then you will see the information about the solution.

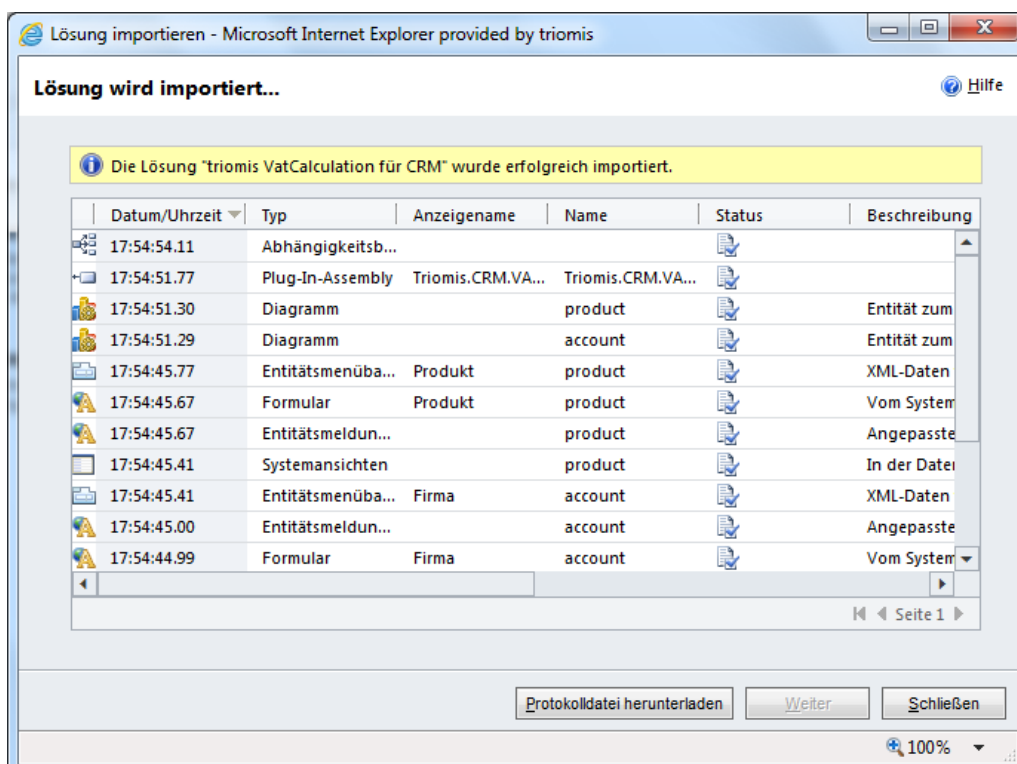


Click on "next". In the next dialog, select the check box to enable the calculation.

Installation Guide



After the solution has been imported, it appears in the solutions in customization area.



Installation Guide



2 Activate the Solution

When registering on the triomis Web site you have your Microsoft Authorization number (10 digits) and your CRM organization name specified. These two items are required for your license key to be generated. The license key is valid only for the specified CRM organization and can't be used to activate the solution in other organizations.

Firmenprofil

[Klicken Sie hier, um weitere Informationen zu erhalten.](#)

Accountinformation

Autorisierungsnummer 0105501261	Kundennummer 5501261	Rechtskräftiger Firmenname trionmis GmbH
Profiltyp Kunde	Gruppentyp Live	Eingetragener Firmenname trionmis GmbH

We will send you the registration key to your e-mail address you entered in the registration form. If you do not have a Microsoft account number please use 00000000. Open the dialog for configuration of the solution:

File Close Actions Help

Solution: triomis VatCalculation for CRM 2016

Information

You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow customization, you can edit them in the Customizations area or from another unmanaged solution.

Solution triomis VatCalculation f...

Account License

Register here for a free key. You only need to confirm its use as a reference. Fill out the form and send the E-mail that is created when pressing 'Send registration mail'. After registering, you will receive the necessary registration key for the setup by e-mail. Please enter a valid company email address and specify your company. Use of this solution is free. You will find the Dynamics Account Number in [CustomerSource](#), the portal for Microsoft Dynamics customers. Please fill up all requested numbers with leading zeros. Feel free to support us with a small donation for further development for this usefull CRM extension.

Salutation	Mr.	Number of users	145
First name	John	E-mail	john.doe@example.com
Last name	Doe	Phone	555 6789
Company	Example Corp	Dynamics account number	9876543210
Street	Main Street 7		You will find this in CustomerSource.
ZIP code	55599	10 digit Dynamics authorized number	9876543210
City	Seattle		You will find this in CustomerSource.
		CRM organization name	Testing
		Accept use as reference	OK

Accept use as reference by typing 'OK'

Save

Donate

MasterCard VISA VISA VISA VISA

The license terms and the key could be read or provide on the tab License. Please enter your key and mark the checkbox for the license agreement. The key is valid for one year. After this period you have to request a new key for renewal.

Installation Guide



FileCloseActions

Solution: triomis VatCalculation for CRM 2016

Help

Information

Information

Configuration

Components

Entities

Option Sets

Client Extensions

Web Resources

Processes

Plug-in Assemblies

Sdk Message Processing S...

Service Endpoints

Dashboards

Reports

Connection Roles

Article Templates

Contract Templates

Email Templates

Mail Merge Templates

Security Roles

Field Security Profiles

Routing Rule Sets

Record Creation and Upda...

SLAs

Apps

Account

License

You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow customization, you can edit them in the Customizations area or from another unmanaged solution.

Please enter your key and press save to validate the key. If you need a new key press 'Get key'. An e-mail template for registration will be opened. You may need to allow popups for this.

Name	Key	Expires	Status	License	Commands
triomis vat calculator Dynamics 365	<input type="text" value="ifnsoHIOUEDBSDpsasdretrIlyci5yMS"/>	2018-08-11	Valid	License accepted: <input checked="" type="checkbox"/>	<div>SaveGet key</div>

Donate

Use the Donate Button for send us a donation via PayPal. This will help us to provide and maintain such solutions for free in the future.

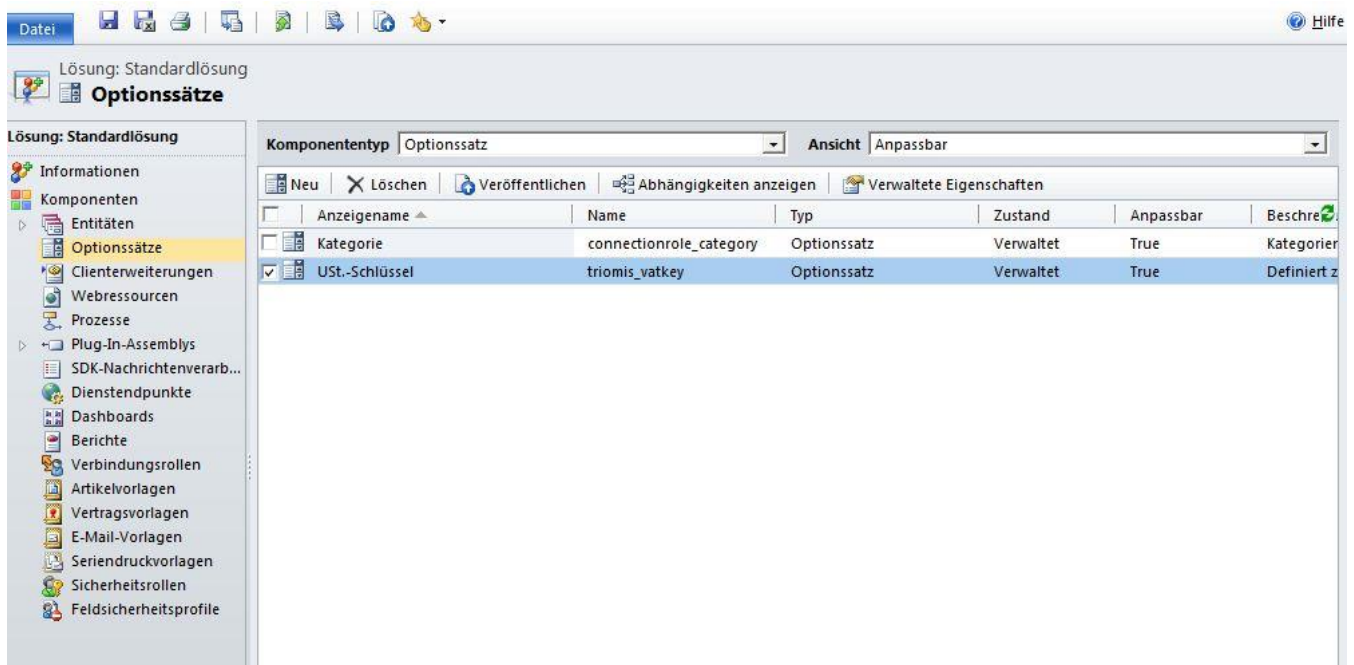
3 Solution Configuration

3.1 Setup of VAT values

The calculation of sales tax is at the item level in quotations, orders and invoices. The underlying sales tax rate is fixed for the products. What keys are available is controlled by an option set.

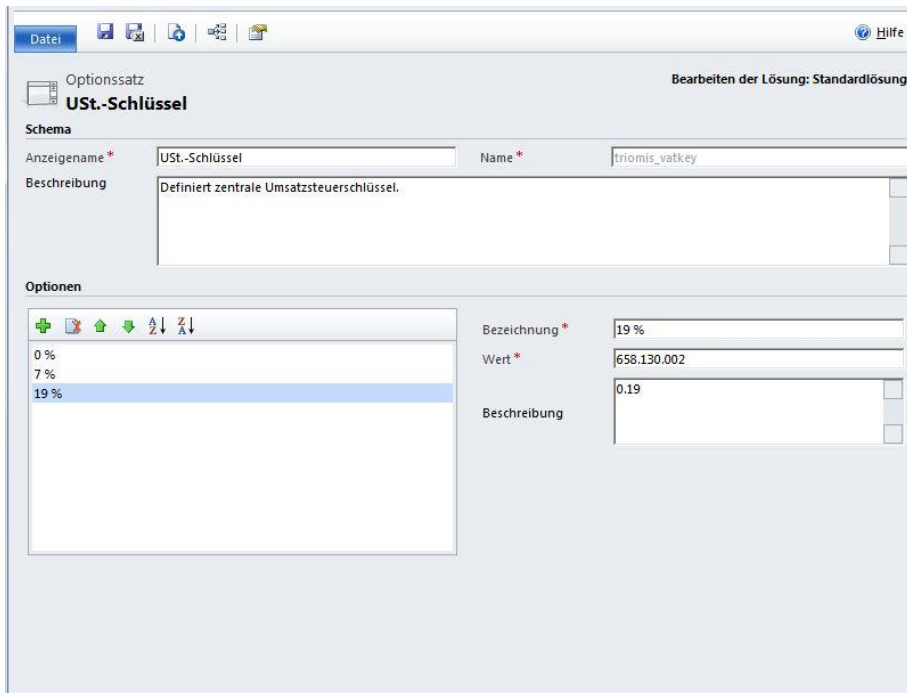
To set the tax key and values, navigate to Settings - Customization – Option Sets.

Open the Option Set Tax rate (UST Schlüssel).



You can specify additional keys, change the display values or change the underlying percentages. The percentage is entered in the Description field. The format is mandatory. 19% can be entered, for example, as 0.19. Please don't enter a comma as decimal separator only the dot (.) is allowed.

Installation Guide



Optionssatz
USt.-Schlüssel

Bearbeiten der Lösung: Standardlösung

Schema

Anzeigename * USt.-Schlüssel Name * triomis_vatkey

Beschreibung
Definiert zentrale Umsatzsteuerschlüssel.

Optionen

0 %
7 %
19 %

Bezeichnung * 19 %

Wert * 658.130.002

Beschreibung 0.19

Installation Guide

3.2 Setup of products

After the tax keys have been entered, you must assign the keys to products in order to use the right percentage for those products in quote, order and invoice details for sales tax calculation.

You need to assign the percentages of all existing products, or you will get an error message when adding a product detail to e.g. an invoice.

Attention: For write in products no sales tax can be calculated, because the tax key can't be determined from the used products.



SUMMARY

Name *	Bratpfanne	Unit Group *	Default Unit
Product ID *	1	Default Unit *	Primary Unit
Family Hierarchy	--	Default Price List +	DefaultPriceList
Valid From	--	Decimals Supported *	2
Valid To	--	Subject	--
Description	--	VAT percentage *	19 %

3.3 Automatic calculation of VAT value

ORDER

Möglicher Verkauf

Summary

Order ID * ORD-01000-T7K3Z7

Name * Möglicher Verkauf

Currency * Euro

Price List * DefaultPriceList

Prices Locked * Yes

PRODUCTS

Product Name	Properties	Unit	Price Per Unit	Quantity	Discount	Extended Amount	Suggestions
Bratpfanne		Primary Unit	€100.00	2.00000	€0.00	€238.00	Suggestions

In the details the tax is calculated based the product tax key as soon as the data record is stored. VAT calculator takes into calculation also the specified manually discount.

Attention: The discount on offer, order, and invoice is not used to calculate the cumulative tax. Set a manual discount on the product level to discount the tax value of the product.

This is due to the possibility of different VAT percentages on the products. E.g. 7% on books and 19% on service products.

Installation Guide

The screenshot shows the 'Angebot (Produkt): Auto' form in Microsoft Dynamics CRM. The 'Allgemein' tab is selected, displaying fields for product selection (Auto), price calculation (Standard verwenden), and delivery details. The 'Preisberechnung' section shows a total price of €119,00.



In the account data can be determined that no tax calculation will take place. This allows EU internal business without tax (reverse tax process). For this, the check box "Tax-Exempt" (UST-befreit) is set to Yes.



ACCOUNT

Musterhausküchenfachgerecht

Entitlement Name ↑
No Entitlement records fo

Details

COMPANY PROFILE

Industry --
SIC Code --
Ownership --

Description

--

MARKETING

Originating Lead --
Last Campaign Date --
Marketing Materials Send

CONTACT PREFERENCES

Contact Method Any
Email Allow
Bulk Email Allow
Phone Allow
Fax Allow
Mail Allow

BILLING

Currency Euro
Credit Limit --
Credit Hold No
VAT exempt* No

SHIPPING

Shipping Method --
Freight Terms --

CHILD ACCOUNTS