Installation Guide

# triomis Copy Entity for Dynamics 365

Dortmund
15.11.2016

# Installation Guide

# Content

# 1 Solution Installation

## 1.1 Prerequisites

CRM Online: CRM Online fulfills all prerequistes.

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 CRM 2015 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 CRM 2015 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.

triomis vat calculator for Dynamics CRM 2015 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. To install the solution you log in as an administrator and navigate to the Settings area - Customization - Solutions. From there, 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 details to see the solution paket



Click on "next". In the next dialog, select the check box to enable the copy function.
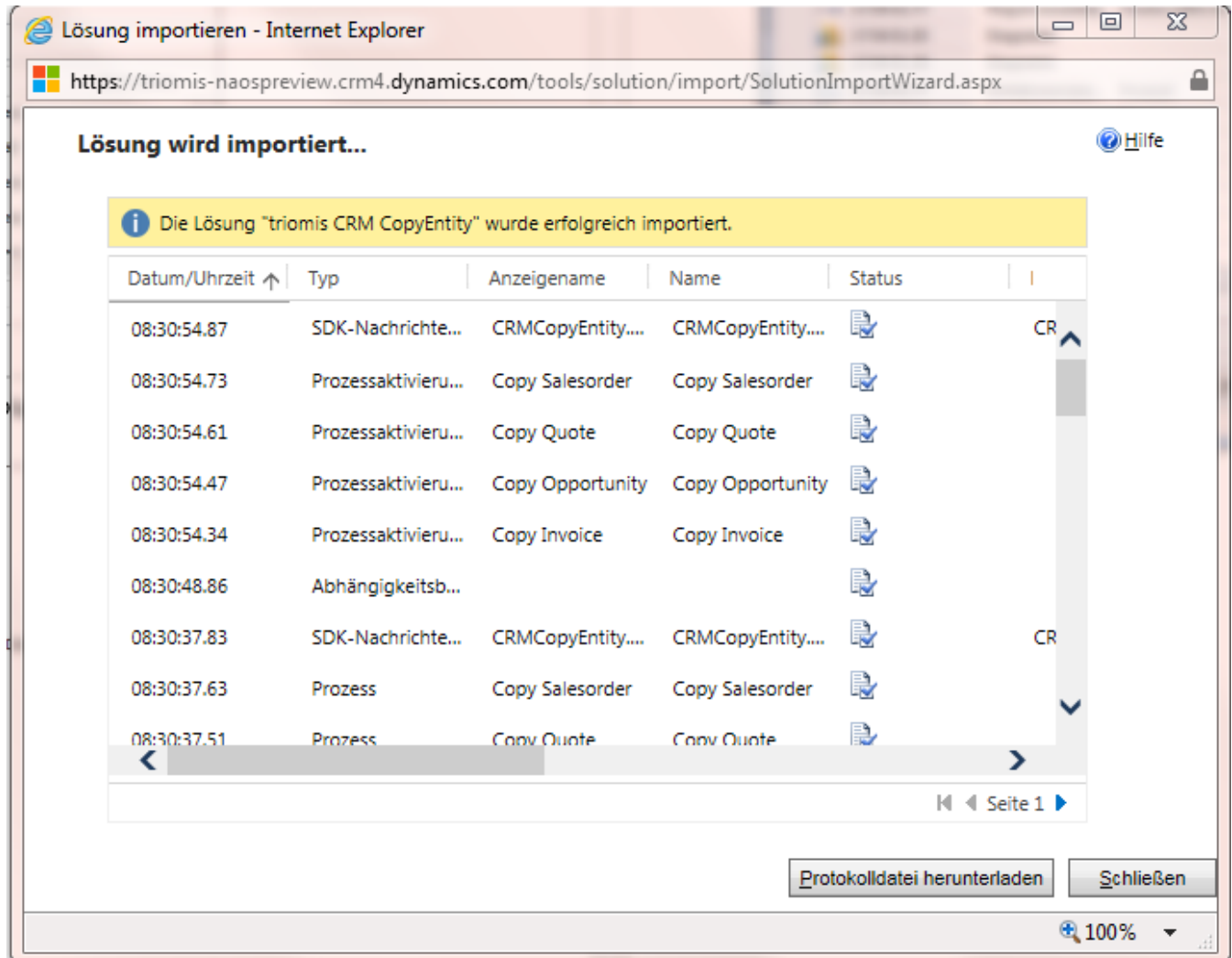
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After the solution has been imported, it appears in the solutions in customization area.

# 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**<br>0105501261 | **Kundennummer**<br>5501261 | **Rechtskräftiger Firmenname**<br>triomis GmbH |
| **Profiltyp**<br>Kunde | **Gruppentyp**<br>Live | **Eingetragener Firmenname**<br>triomis GmbH |

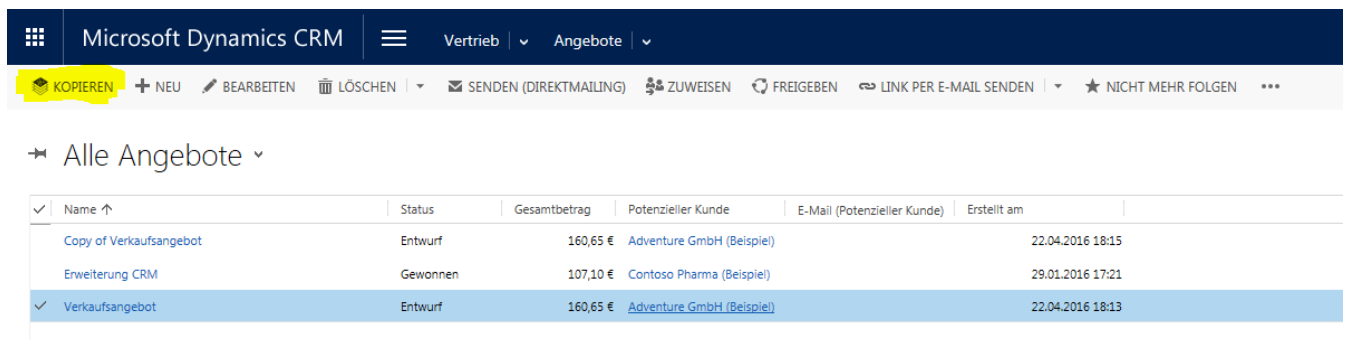Open the dialog for configuration of the solution:
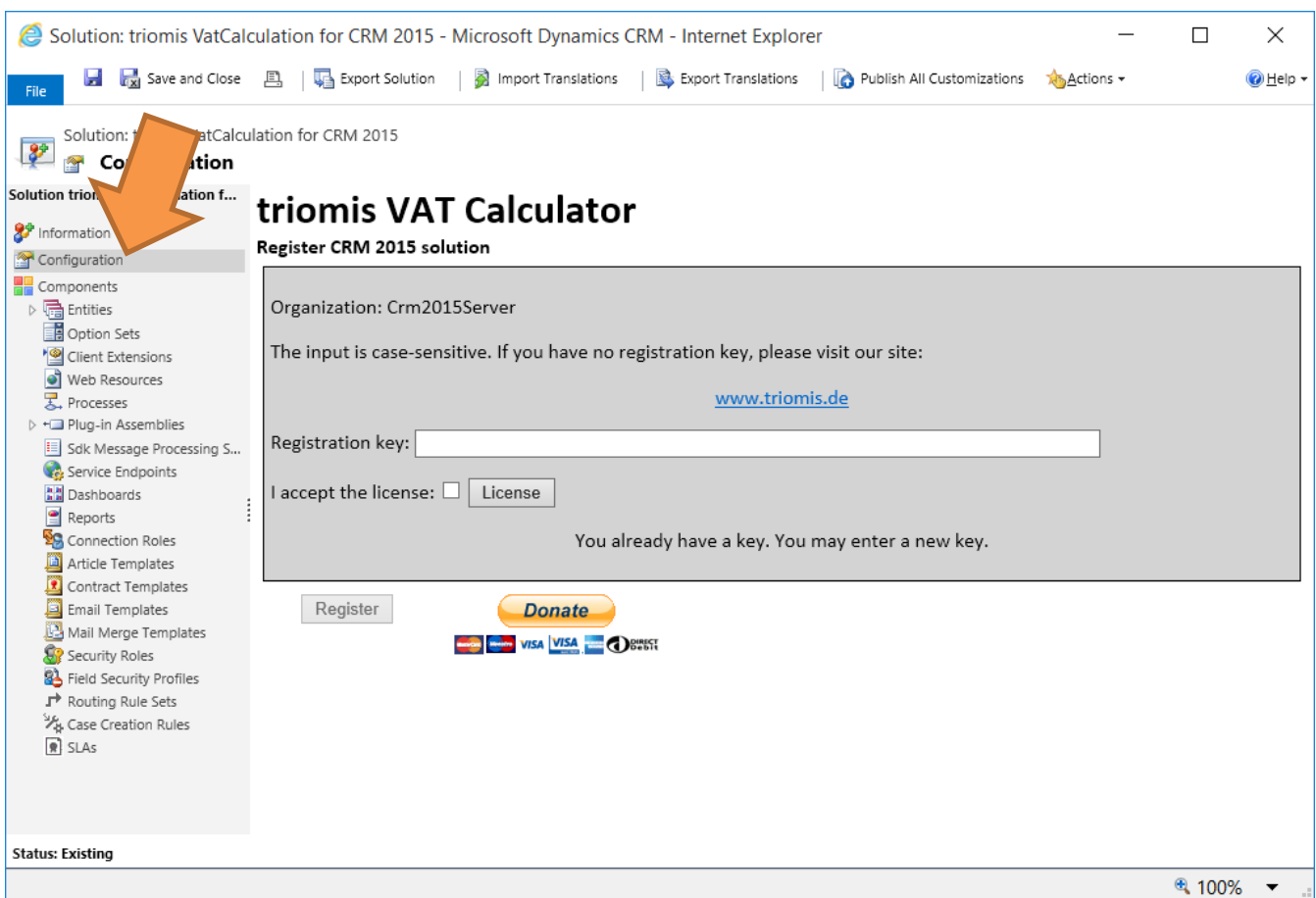


You can view the license terms by clicking the "Lizenz" button. Enter the registration key and confirm the license terms. The registration is valid for one year and must then be renewed.

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# 3  Using the solution

After activating the solution, the copy function is available in quote, order and invoice entities.

Select the appropriate record in the appropriate sales entity. A "Copy" button appears in the toolbar. After clicking the button, the copying process is started. The record with all content and the subordinate product lines will copied. In the subject field, "Copy" is prepended. Depending on the load of your CRM system, it may take some time for the copy to be generated.
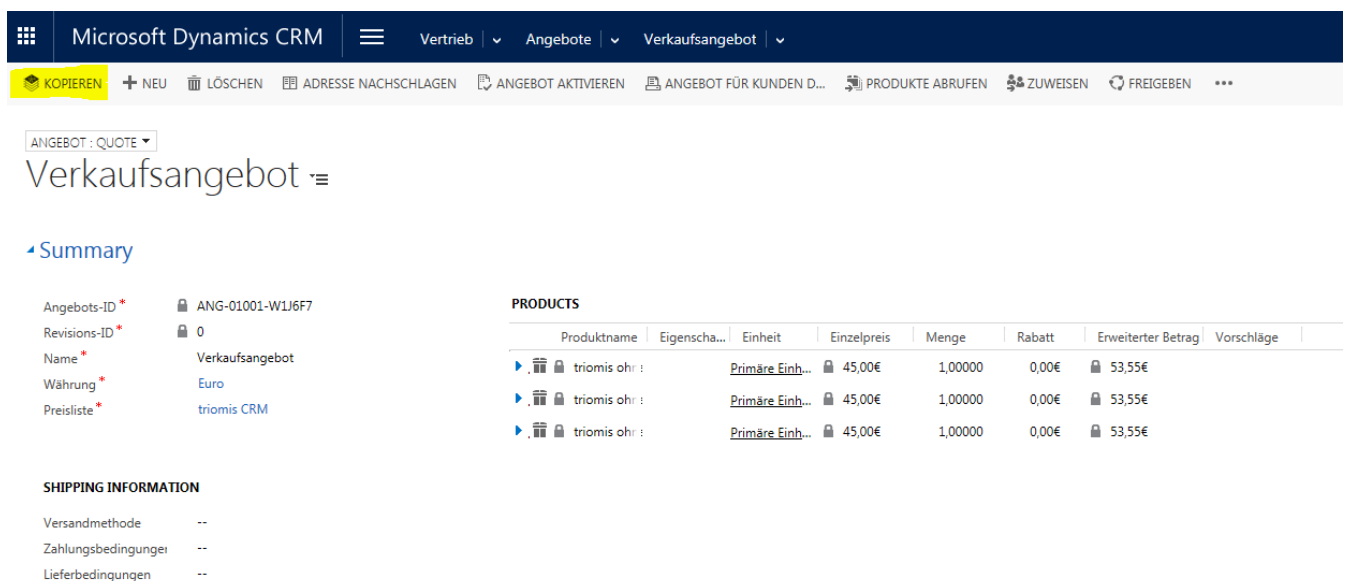


It is also possible to create a copy if you have opened a specific quote record (order, invoice).