



DYNAMIC VAT IMPORT GUIDE

Version 1.0

Auto calculate VAT in
opportunities, quotes, orders and
invoices in Microsoft Dynamics
365

Developed By



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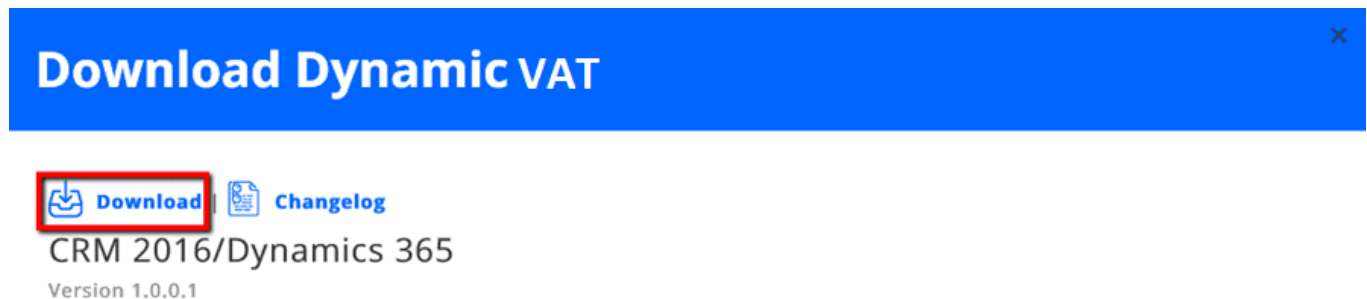
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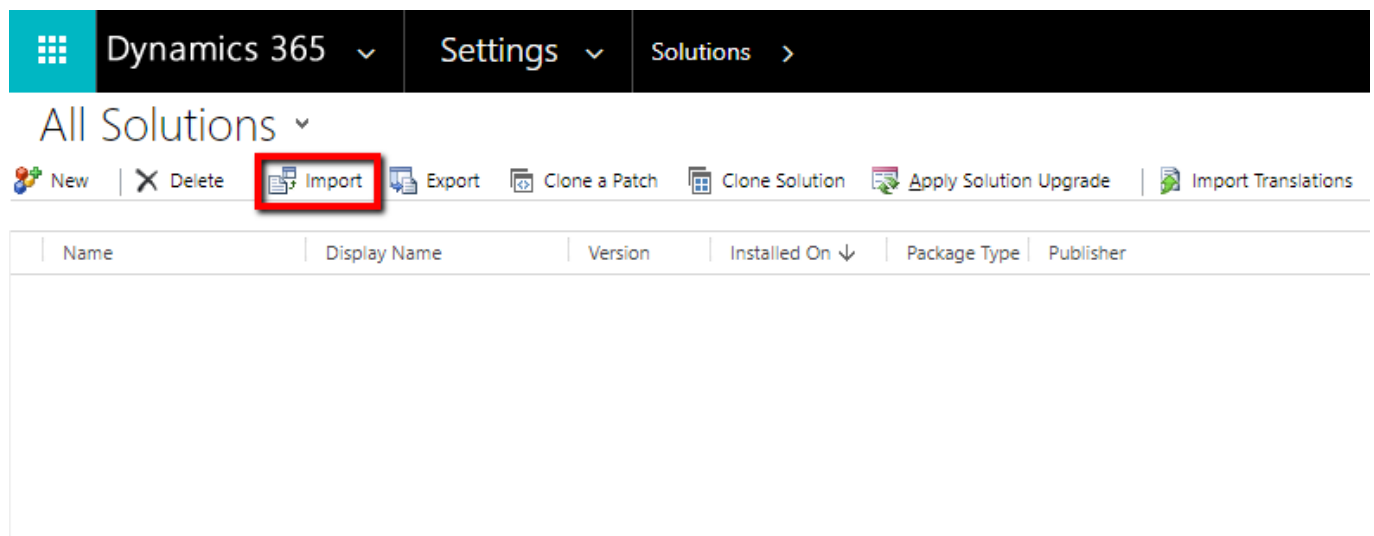
Solution Import

Please follow the below steps in order to start the import process:

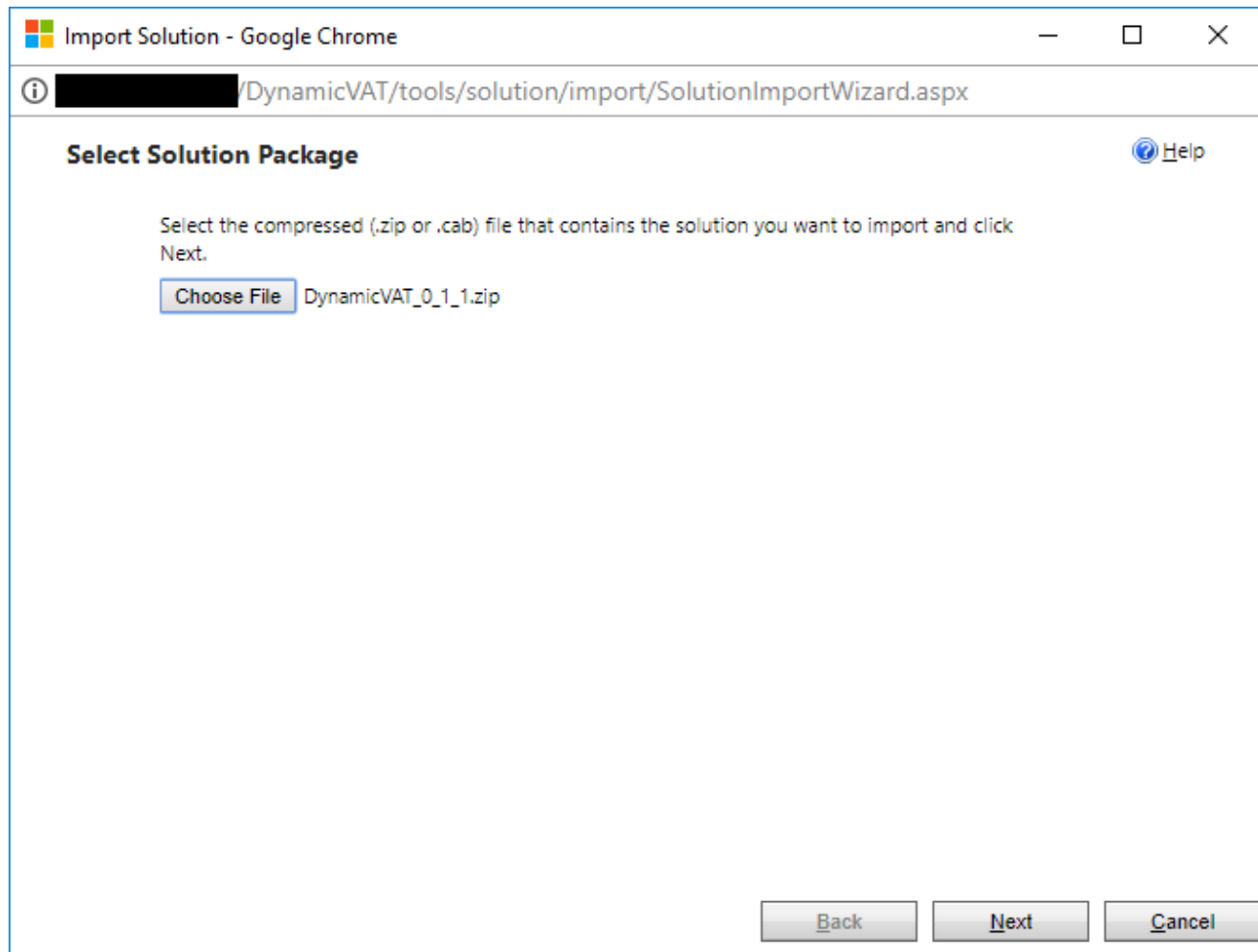
1. Go to the **Download** button on the solution page and download the latest solution zip file.



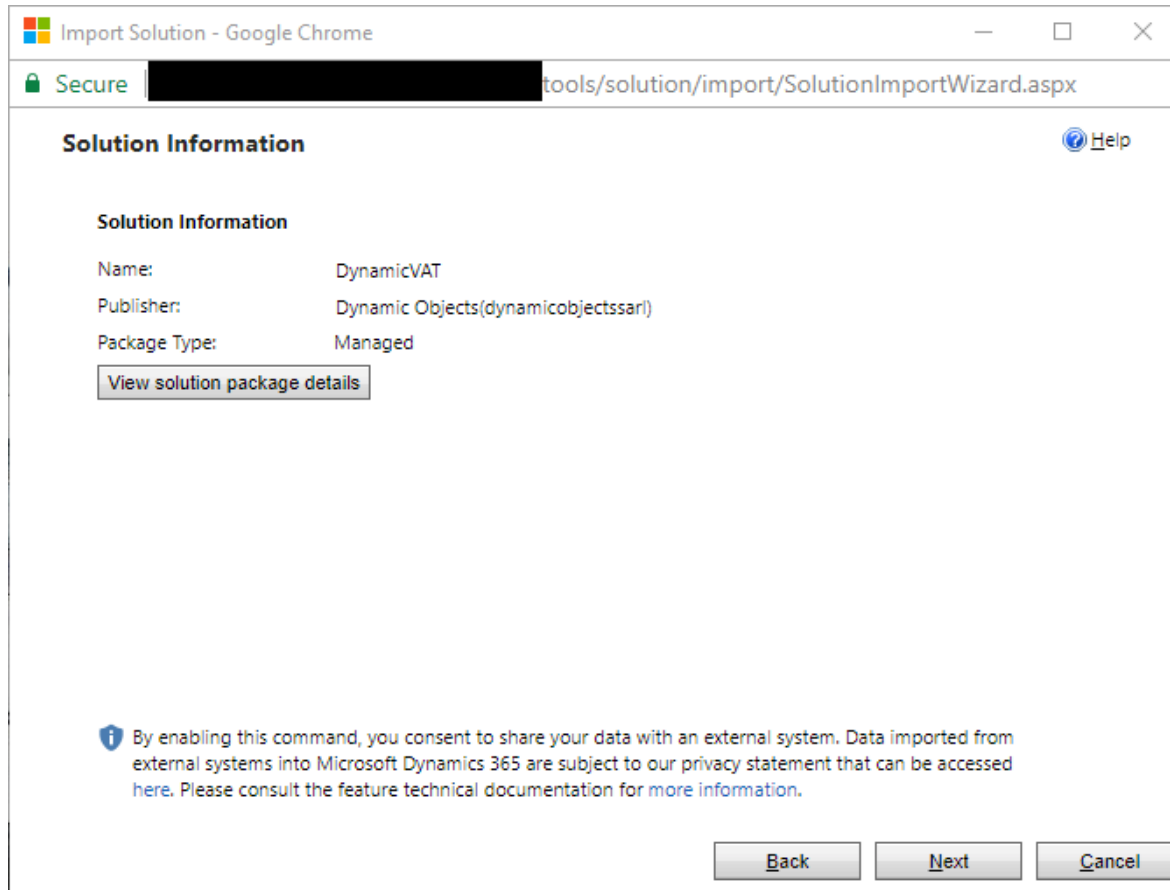
2. Login to your Microsoft Dynamics CRM/365 organization and head to **Settings** -> **Solutions** and click on the **Import** button.



3. Select the solution file that you downloaded in Step 1 and Press **Next**.



4. Verify that you imported the correct Solution by checking the solution information and package details and press **Next**.



The screenshot shows a web browser window titled 'Import Solution - Google Chrome'. The address bar shows a secure connection to a URL ending in 'tools/solution/import/SolutionImportWizard.aspx'. The page content is titled 'Solution Information' and includes a 'Help' link. Below the title, the following information is displayed:

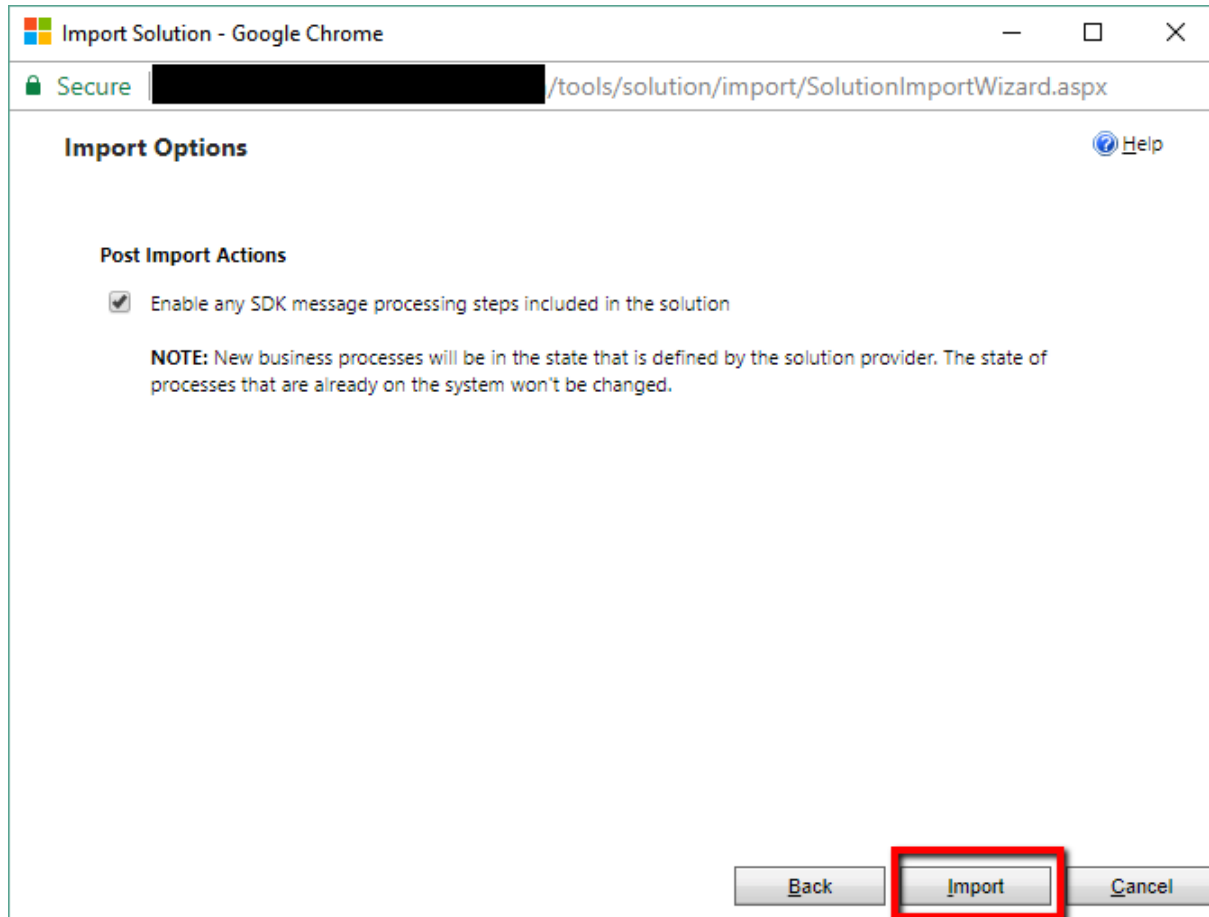
Name:	DynamicVAT
Publisher:	Dynamic Objects(dynamicobjectssari)
Package Type:	Managed

Below the table is a button labeled 'View solution package details'.

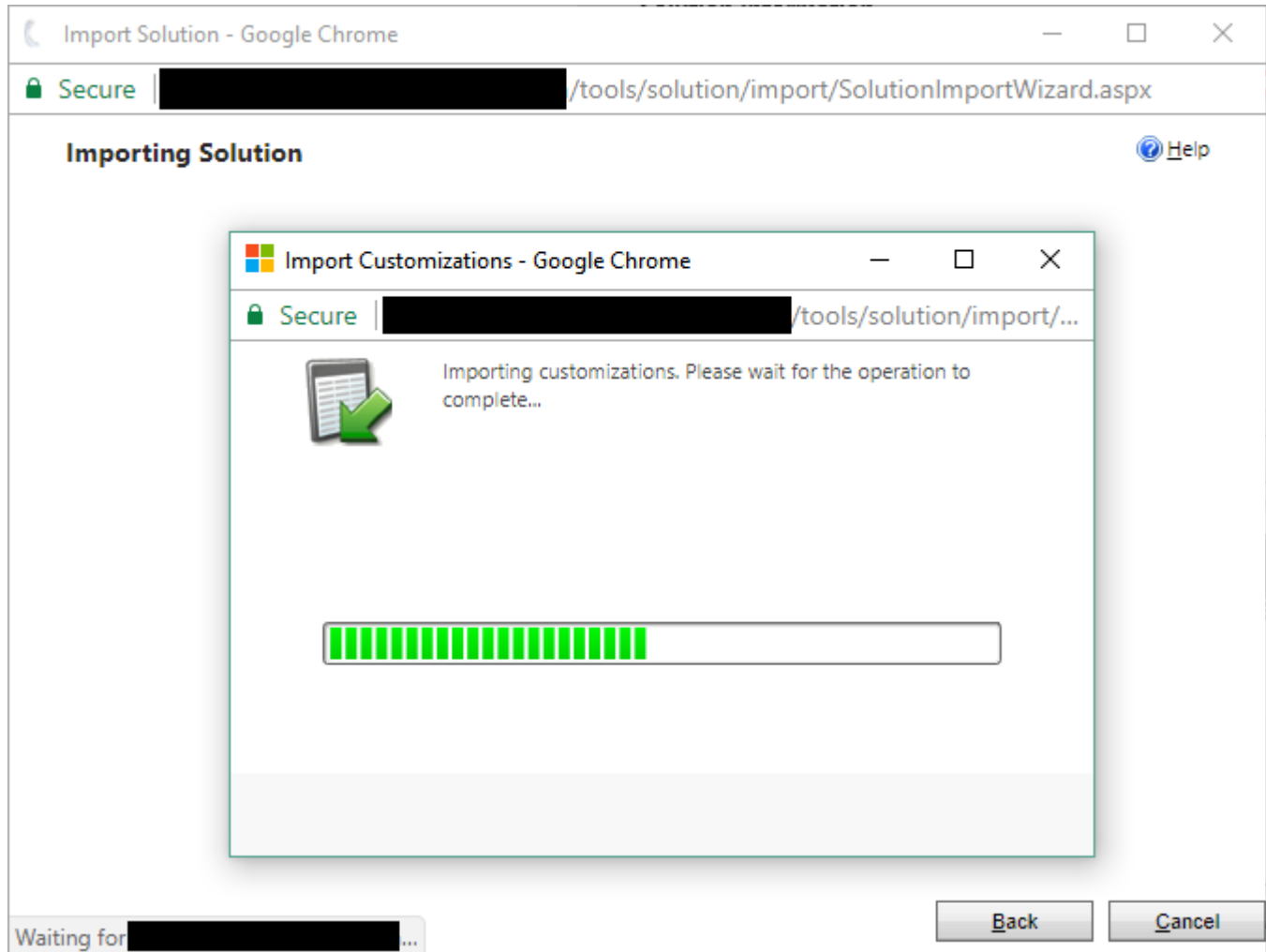
At the bottom of the page, there is an information icon and a paragraph: 'By enabling this command, you consent to share your data with an external system. Data imported from external systems into Microsoft Dynamics 365 are subject to our privacy statement that can be accessed [here](#). Please consult the feature technical documentation for [more information](#).'

At the bottom right, there are three buttons: 'Back', 'Next', and 'Cancel'.

5. Please make sure that the **"Enable any SDK message processing steps included in the solution" option is selected** and select **Import**.



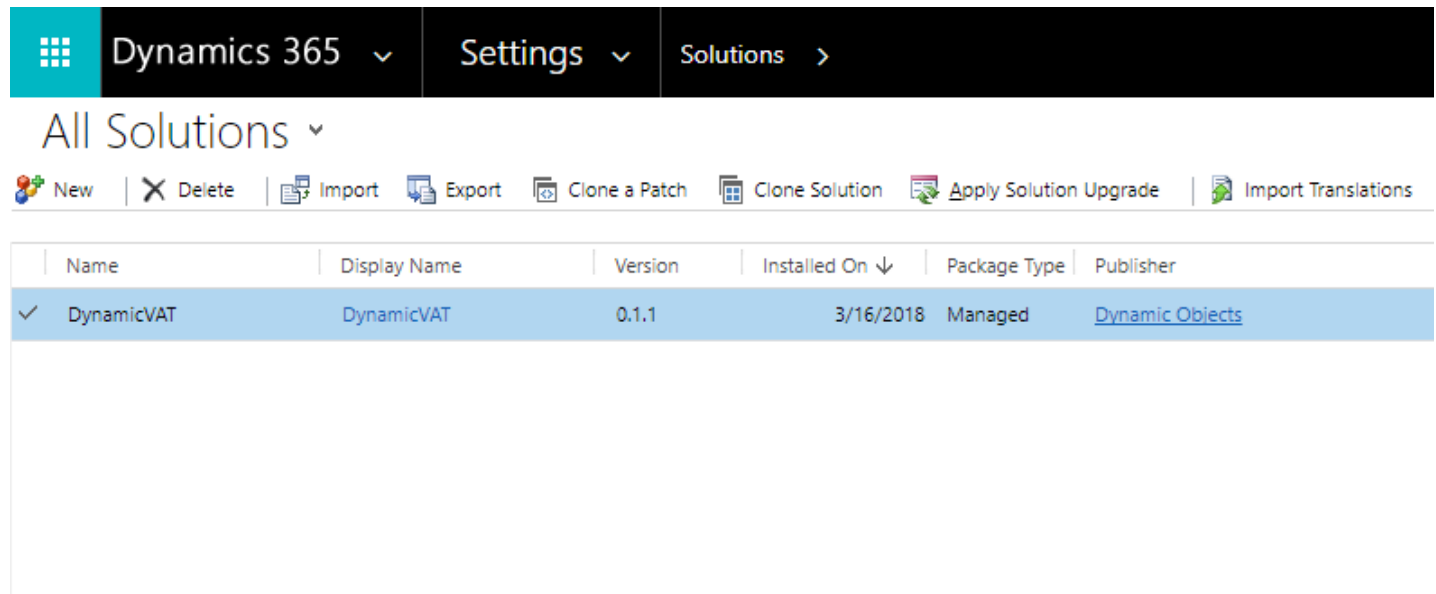
6. The Solution import process will start. Please wait around 5 minutes for the solution import process to complete.



7. Once the import is complete, you will see a screen with an overview of the import and components. Please click **Close** and proceed to Solution Registration.

Registration

When the import process is complete, please double click on the solution imported to start the registration process.



The screenshot shows the Dynamics 365 user interface. At the top, there is a navigation bar with 'Dynamics 365', 'Settings', and 'Solutions'. Below this is a section titled 'All Solutions' with a dropdown arrow. A toolbar contains icons for 'New', 'Delete', 'Import', 'Export', 'Clone a Patch', 'Clone Solution', 'Apply Solution Upgrade', and 'Import Translations'. Below the toolbar is a table with the following data:

	Name	Display Name	Version	Installed On ↓	Package Type	Publisher
✓	DynamicVAT	DynamicVAT	0.1.1	3/16/2018	Managed	Dynamic Objects

2. Please fill-in your details in the **Information** section and make sure to enter the correct email details in order to receive important updates about the solution.

Solution: DynamicVAT - Microsoft Dynamics 365 - Google Chrome

Secure | /tools/solution/edit.aspx?id=%7b355B4DAD-5913-423B-ADD6-8F42182FFCEB%7d

PowerApps

File Close Show Dependencies Actions Help

Solution: DynamicVAT

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 DynamicVAT

Information

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Components

Entities

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Sdk Message Processing St...

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Reports

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Article Templates

Contract Templates

Email Templates

Mail Merge Templates

Security Roles

Field Security Profiles

Routing Rule Sets

Record Creation and Upda...

SLAs

Apps

Custom Controls

Virtual Entity Data Providers

Virtual Entity Data Sources

Mobile Offline Profiles

Dynamic Objects

Registration Status

Expires

Not Subscribed

--

Register Configuration

Submit

Try Subscribe

Information

First Name*

Last Name*

Company*

Email*

Main Phone*

Address*

City*

State/Province*

Postal Code*

Country*

Credentials

Please provide valid login credentials to your CRM organization

Username*

Password*

In the **Credentials** section, please type in the appropriate user with the required security role which will be used to renew your subscription. This user needs to be allocated the "**DynamicVAT - Service User**" role.

DynamicVAT - Service User

DynamicVAT - User

Once all the information is entered, please click **Submit** and you are subscribed for the 30-day trial.

Solution: DynamicVAT - Microsoft Dynamics 365 - Google Chrome

Secure [/tools/solution/edit.aspx?id=%7b35584DAD-5913-423B-ADD6-8F42182FFCEB%7d](#)

PowerApps

File Close Show Dependencies Actions Help

Solution: DynamicVAT

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 DynamicVAT

- Information
- Configuration
- Components
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 - Sdk Message Processing St...
 - Service Endpoints
 - Dashboards
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 - Article Templates
 - Contract Templates
 - Email Templates
 - Mail Merge Templates
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 - Routing Rule Sets
 - Record Creation and Upda...
 - SLAs
 - Apps
 - Custom Controls
 - Virtual Entity Data Providers
 - Virtual Entity Data Sources
 - Mobile Offline Profiles

Dynamic Objects

Registration Status: Trial Expires: 4/20/2018

Register Configuration

Submit Test CRM Credentials

Try ☒ Subscribe ☐

Information

First Name*	John	Address*	Samoria One Building
Last Name*	Do	City*	Batroun
Company*	Dynamic Objects	State/Province*	NL
Email*	john_do@dynamicobjects.net	Postal Code*	1400
Main Phone*	+9616741343	Country*	Lebanon

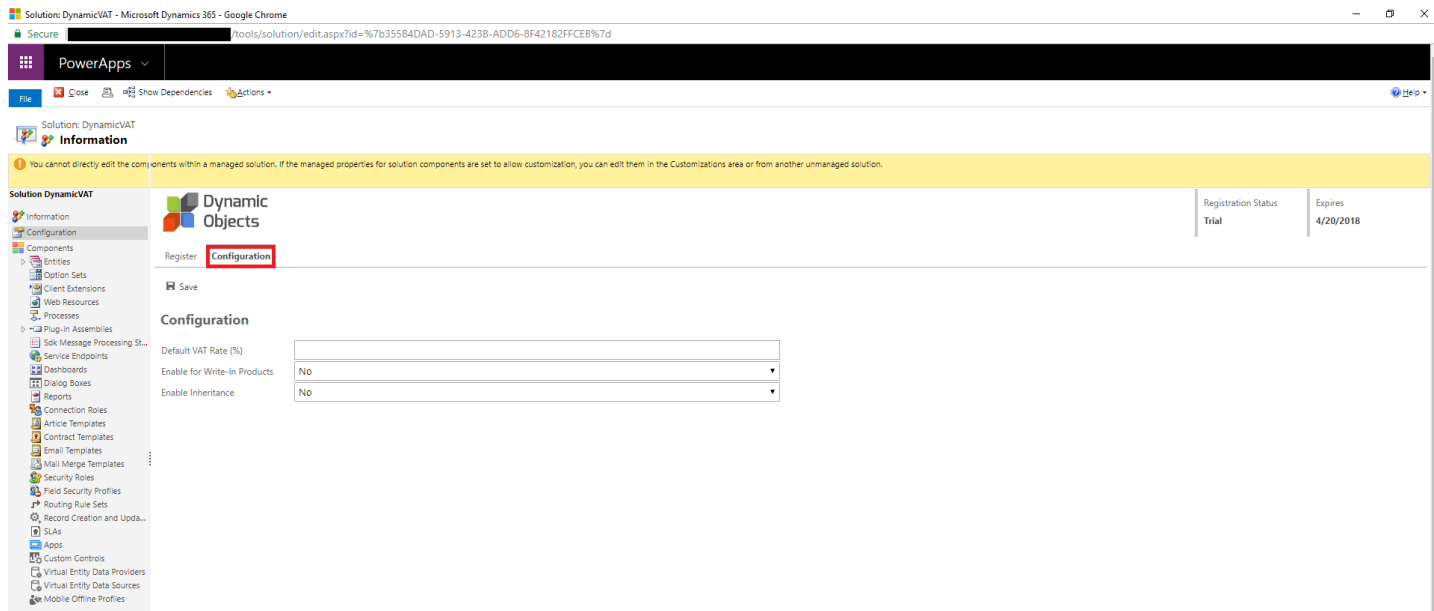
Credentials

Please provide valid login credentials to your CRM organization

Username*	john_do@dynamicobjects.net	Password*	*****
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Configuration

Now that you successfully registered your solution, you need to click on the **Configuration** tab to configure VAT Rate and how it will be applied.



Please add a value to **Default VAT Rate (%)** to be applied at the level of Opportunity Product, Quote Product, Order Product and Invoice Product if neither the Product itself nor one of its parent Products has been defined with a VAT Rate.

Choose if you want to add the Default Rate set to write in products when added by setting **Enable for Write-In Products** to **Yes**.

Choose if you want to take the Parent Product set rate whenever a product has none by setting **Enable Inheritance** to **Yes**.

Click **Save** once you are done.

Note: All configurations set will take effect on new Opportunity Products, Quote Products, Order Products and Invoice Products created only.

[Register](#)
[Configuration](#)

[Save](#)

Configuration

Default VAT Rate (%)	<input type="text" value="11"/>
Enable for Write-In Products	<input type="text" value="Yes"/>
Enable Inheritance	<input type="text" value="Yes"/>

Subscription

The trial solution will expire after 15 days; thus, you need to subscribe in order to continue using the solution features. The steps are as follows:

- Under **Register** section click **Subscribe**.
- In the **Payment Plan** section, select your preferred payment plan **Monthly** or **Yearly**.
- In the **Billing Address** Section, Enter the billing address. You can use the **Copy Address Above** button to automatically copy the address details entered above or enter a different billing address.

Solution: DynamicVAT - Microsoft Dynamics 365 - Google Chrome

Secure [URL]

PowerApps

Solution: DynamicVAT

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 DynamicVAT

Dynamic Objects

Registration Status: Trial Expires: 4/20/2018

Register Configuration

Submit Test CRM Credentials

Try **Subscribe**

Information

First Name* John

Last Name* Do

Company* Dynamic Objects

Email* john_do@dynamicobjects.net

Main Phone* +9616741343

Address* Samoria One Building

City* Batroun

State/Province* NL

Postal Code* 1400

Country* Lebanon

Credentials

Please provide valid login credentials to your CRM organization

Username* john_do@dynamicobjects.net

Password*

Payment Plan

Plan*

Billing Address

Copy Address Above

Address Line 1*

Address Line 2

City*

State/Province*

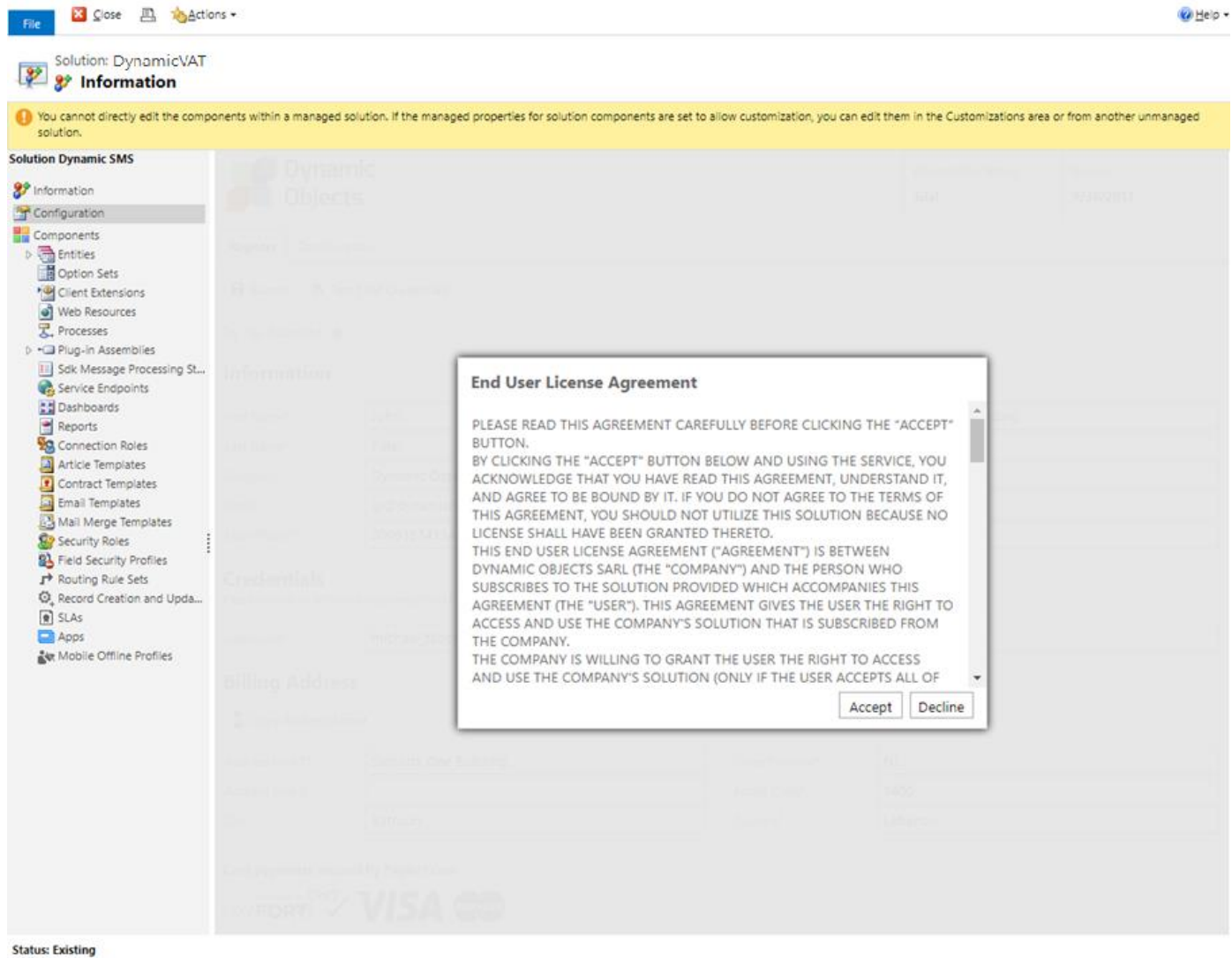
Postal Code*

Country*

Card payments secured by Payfort.com

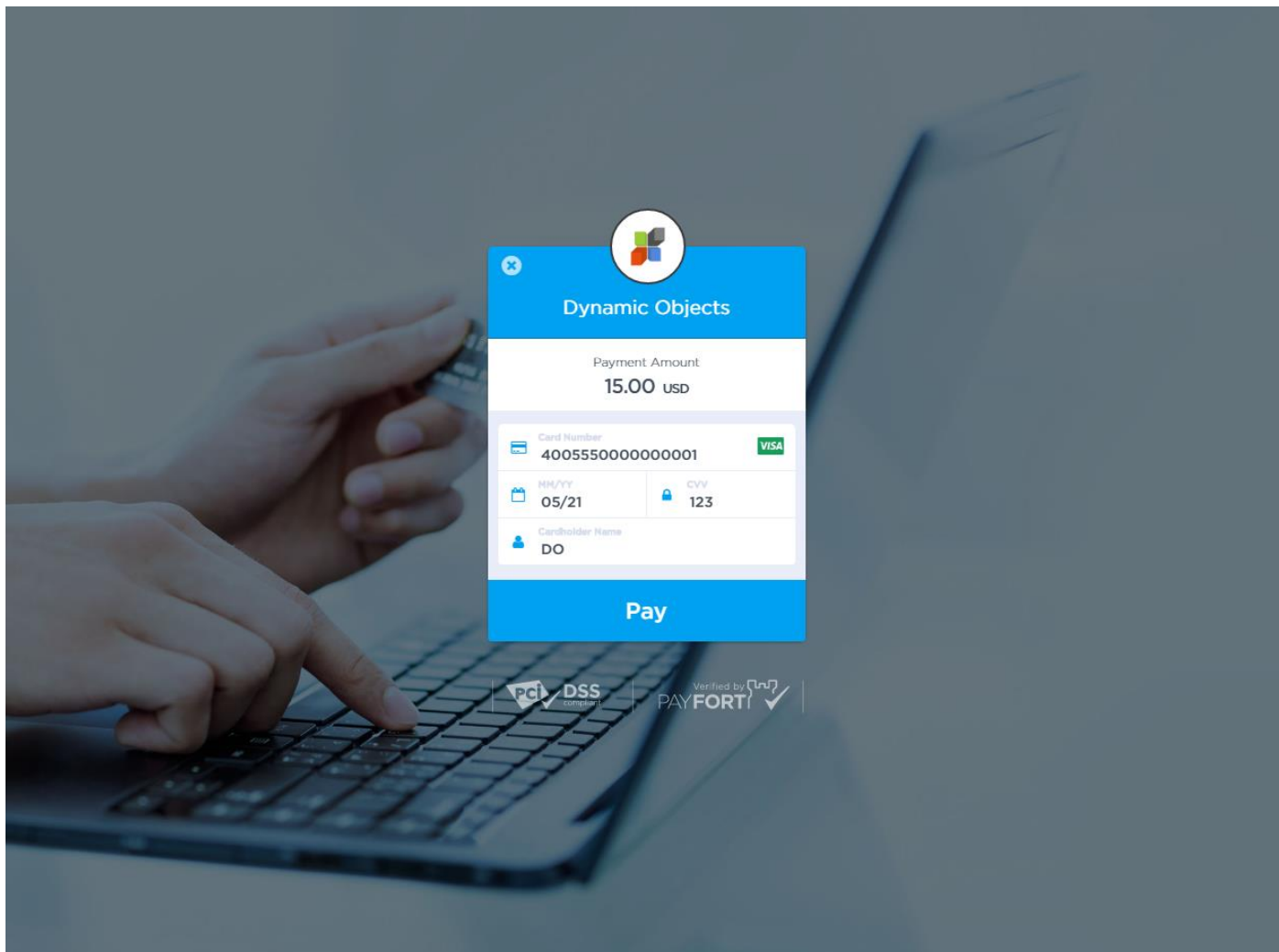
PAYFORT VISA MasterCard

- Once **Plan** is selected and the billing fields are filled, press the **Submit** Button and you will be presented with the End User License agreement. Please read it carefully and press **Accept** to continue to the payment page.



2. The payment page lists the amount that you will be billed depending on your selected plan (Monthly or Yearly). Enter your **Card Number**, **Expiration Date**, **CVV** and **Cardholder Name** and press the **Pay** Button.

Note: We currently support only visa and Mastercard as payment methods.



If the payment is Successful, you will be routed to the **Configuration** Page and the solution is extended for another period as per your selection (Month or Year).

The **Payment Method** section lists the masked card details so you keep track of the payment details used.

Please note that the solution will automatically renew every month/year on the expiration date.

If you wish to stop using the solution, please click on the **Unsubscribe** button and confirm.

The solution will remain active until the expiry date.