User Guide

Purchase Manager
For Microsoft Dynamics 365 / CRM

Document Version: 1.0

Solution Version: 365_102017_3_4

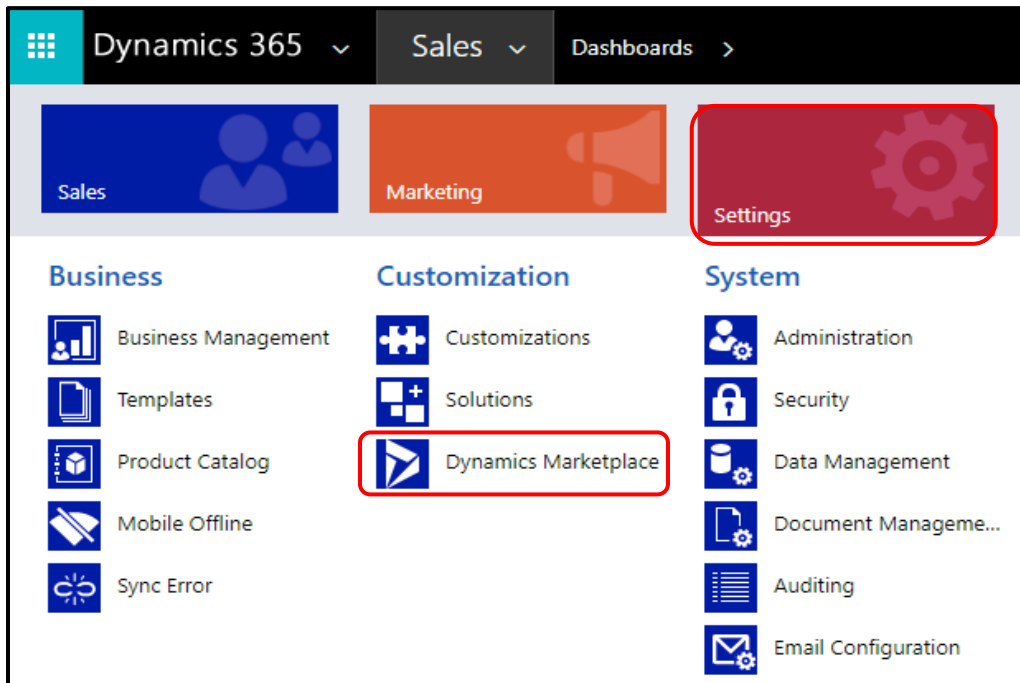THE CRM SERVICES VALUE SOURCE

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How to Install Purchase Manager in your Dynamics 365?

To **Install** MTC's Purchase Manager Add-on solution into your Dynamics 365, please follow the below instructions.
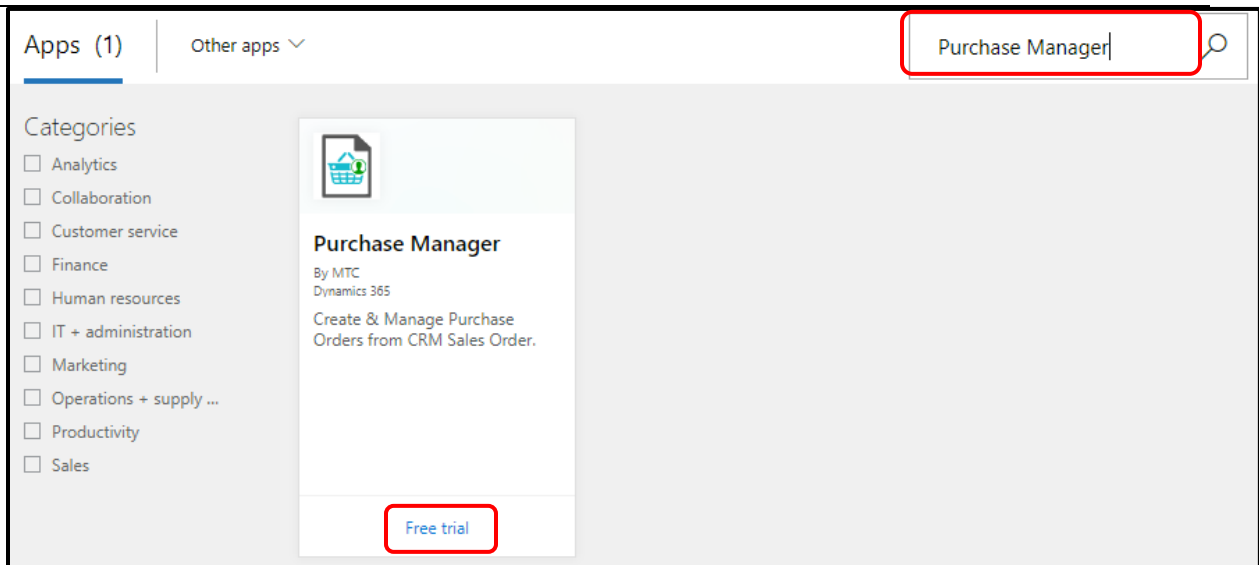
Step1:

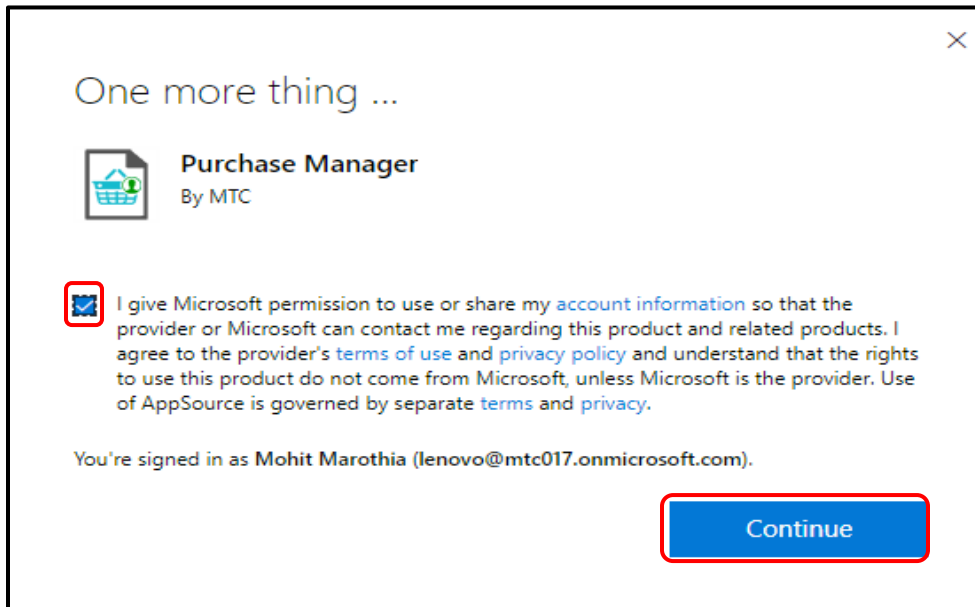➢ Navigate to **Dynamic 365 → Settings** and click on **Dynamics Marketplace**.

Step2:

➢ In search box search for **Purchase Manager by MTC** and click on **free trial**.

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Step3:

➤ Tick the **Check Box** to give permissions and click on **Continue.**

Step4:

➤ Tick the two check boxes to agree **Microsoft Legal Terms and conditions** and agree to **Privacy Statement and Legal Terms** and click on **Agree** for importing the solution.

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Step5:

➢ After clicking on agree the **Installation Process Begins**.

➢ After completing the installation, you will notice that **licensing solution** also installed along with **Purchase Manager Solution**.

Step6:

➢ To get the free trial Click on **licensing solution.**

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> You will be redirected to Account Registration window.

Step7:

> Please fill up the **Account Information** and click on **submit**. **"This will be a onetime activity."**

> The account registration window refreshes and loads up with MTC products just below the account details.

> You can notice **Purchase Manager Solution** status as **Installed**.

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| BackOfficeBundle					Purchase As Bundle	Update License
	Expense Manager			Get it Now		
	Revenue ForeCast Manager			Get it Now		
	Credit Card Processing			Get it Now		
	Purchase Manager			Installed	Purchase License	Update License

Note: The free trial license key is generated and activated on the first use of the product.

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How to Configure Purchase Manager Security Roles in your Dynamics 365?

Any user other than CRM Administrator must have Purchase Manager Security roles to access the solution. Only a CRM Administrator can administer these security roles using the below procedure.
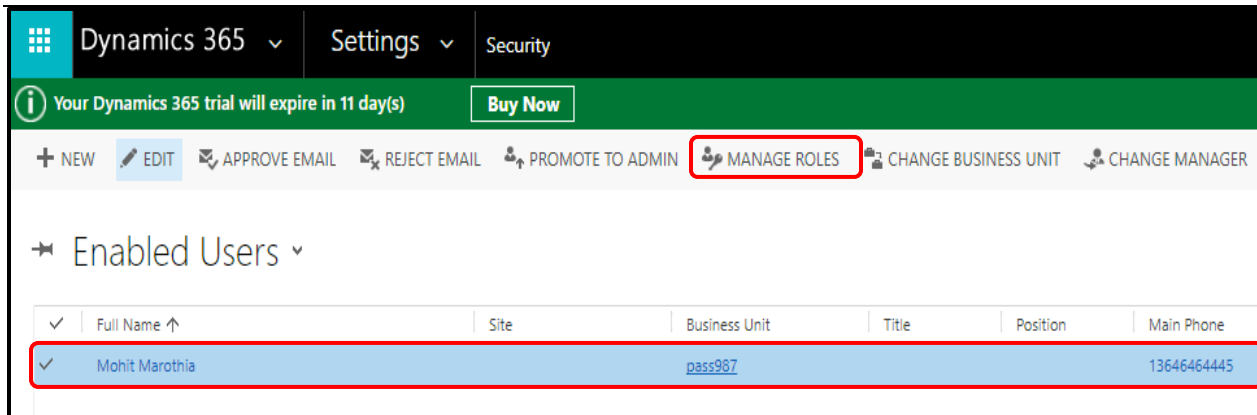
Step1:

- ➢ Navigate to **Dynamics 365 → Settings → Security**.
- ➢ Click on **Users**.
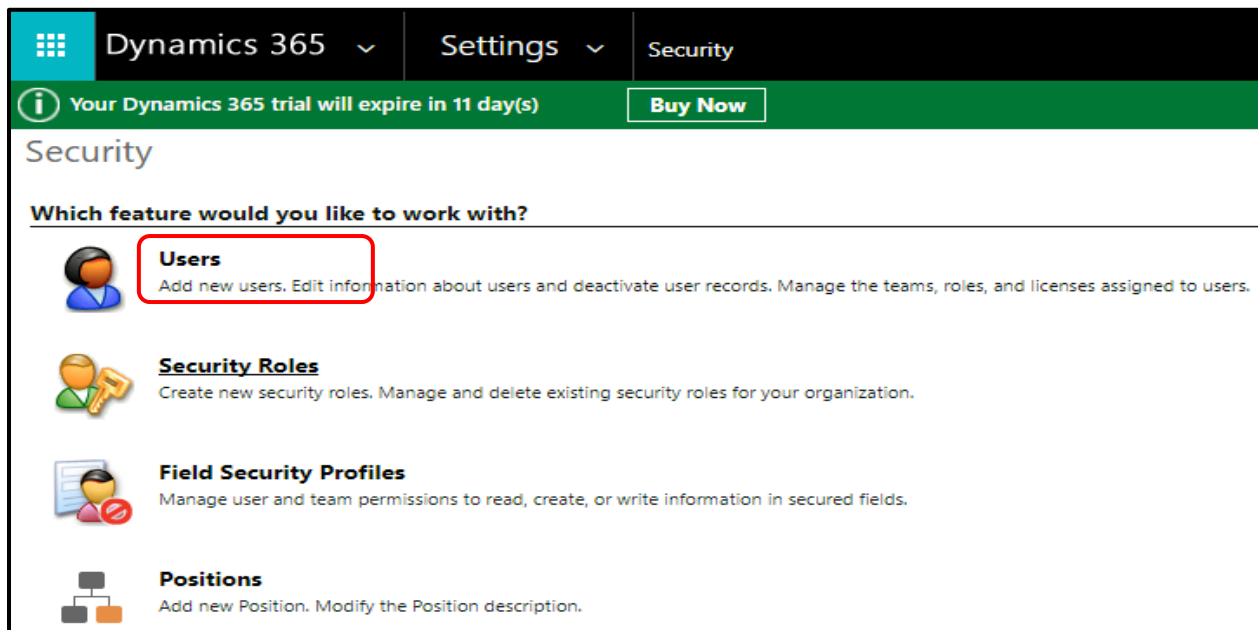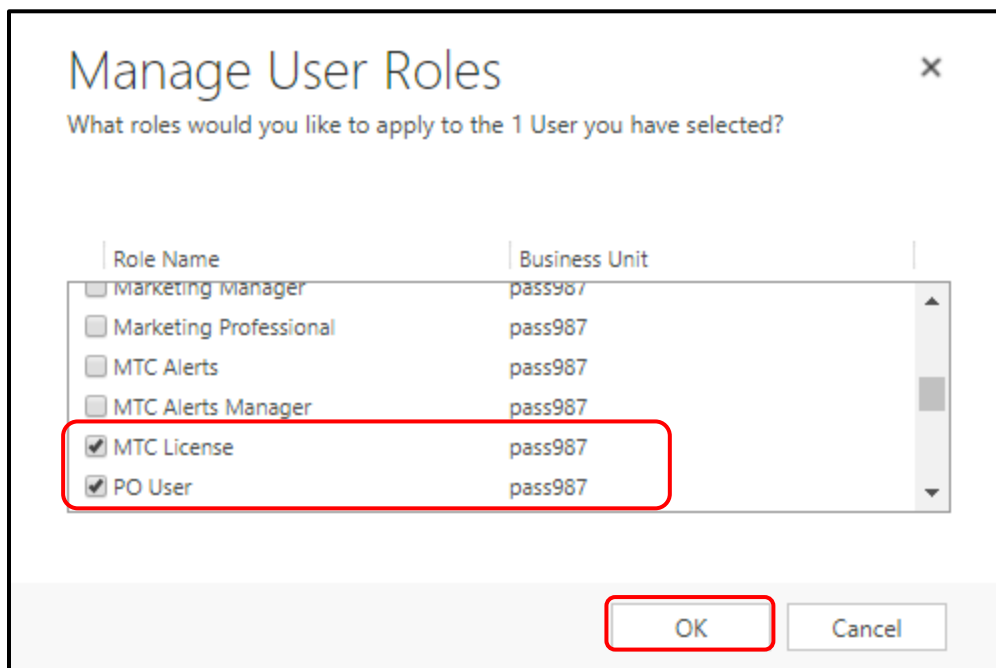
Step2:

- ➢ It opens a new window with a list of Enabled User as shown in Figure.
- ➢ Select the check box of user name to make a modification, click on **Manage Roles** in the ribbon as shown.

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Step3:

➢ A new window will open as shown.
➢ Tick the check boxes of roles as **"MTC License"**, **"PO user"** and click on "Ok" to assign the role to the user.

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How to Configure Purchase Manager in your Dynamics 365?

Company Profile:

 ➢ Select the product as **Purchase Manager** in Solutions.
 ➢ Click on **Company Profile**.
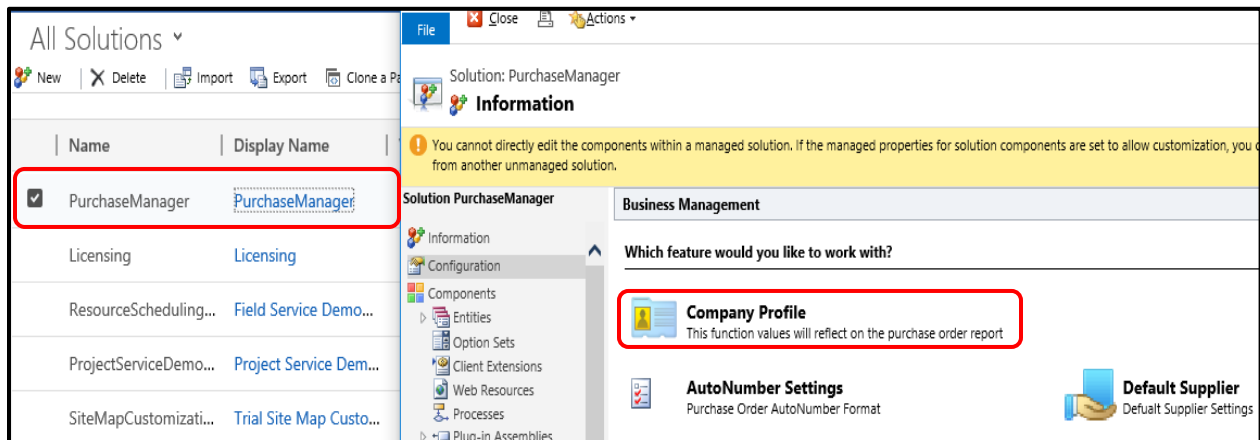
 ➢ Input Company Details if required.
 ➢ Type in Company Name, Phone Number, Fax Number, & Address.
 ➢ Click on **Submit** to Save the Details or Click on **Home** to go back to previous menu.

## Auto Number Settings:

➢ Click on **Auto Number Settings.**
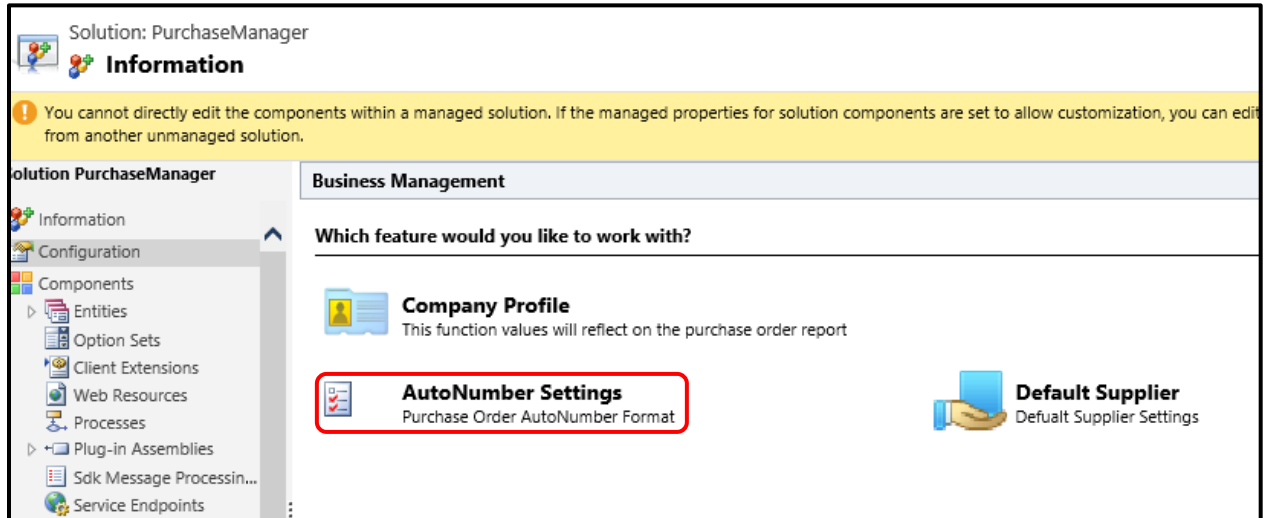
➢ Auto Number format is optional.
➢ Enter the Format for Purchase order system. For example if you require as MTC-001 or XYZ-1001 etc. to maintain a unique number for all transactions.
➢ Enter the Starting from (number which will increment by 1 for every new transaction to form a unique number.
➢ Option to **Submit** and **Reset** is also available, Click on **Home** to go back to previous menu

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Purchase Order Auto Number Format

Format MTC-001

Starting From 1

Home   Submit   Reset

## Default Supplier:

➢ Click on **Default Supplier**.

Solution: PurchaseManager
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 from another unmanaged solution.

Solution PurchaseManager

🔧 Information
🗂 Configuration
🔲 Components
  ▷ 📑 Entities
    📋 Option Sets
   🔧 Client Extensions
    🌐 Web Resources
    🔄 Processes
  ▷ 🧩 Plug-in Assemblies
    📋 Sdk Message Processin...
    ⚙ Service Endpoints

Business Management

Which feature would you like to work with?

Company Profile
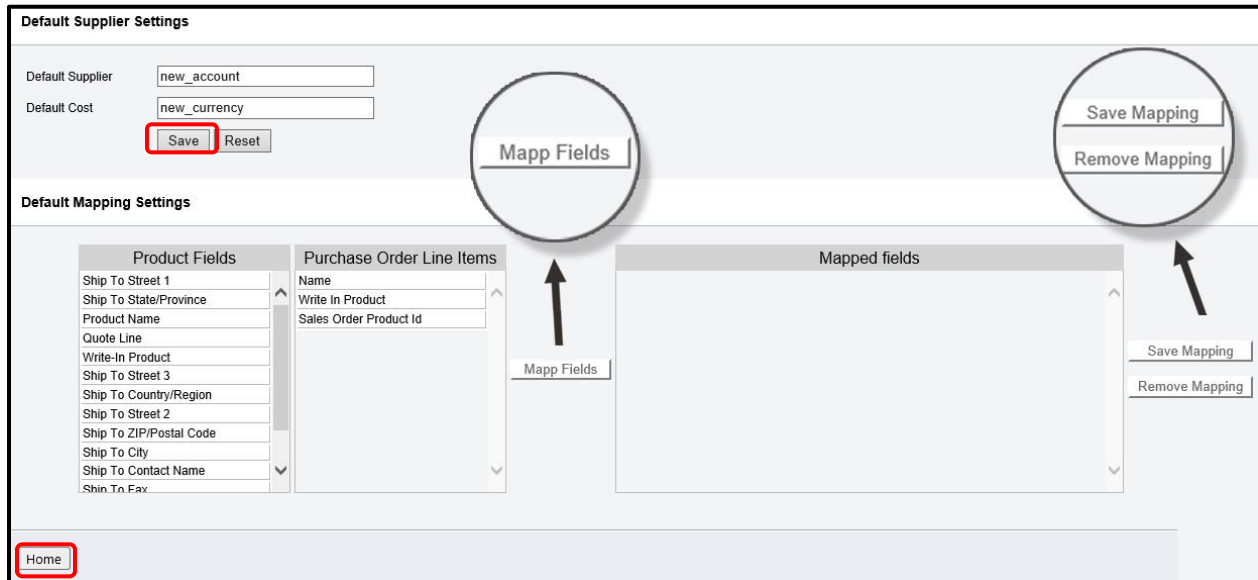This function values will reflect on the purchase order report

AutoNumber Settings
Purchase Order AutoNumber Format

Default Supplier
Defualt Supplier Settings

➢ Default Supplier, Default Cost are optional.
➢ **Default Supplier:** It's a list of Supplier attributes which are newly created in Sales Order Details.

➢ **Default Cost:** It's a list of Money attributes which are newly created in Sales Order Details.
➢ If required select Attribute from list of Attributes are available to both Default Supplier and Default Cost, Click on **Save**.

➢ If Mapping is required then select product field entity and to which PO Line item entity and click in Map Fields to get mapping fields.
➢ Repeat this operation as many times as required.
➢ The Mapping Fields are displayed in a separate block as shown above.
➢ These fields either can be saved or can be removed from the list.

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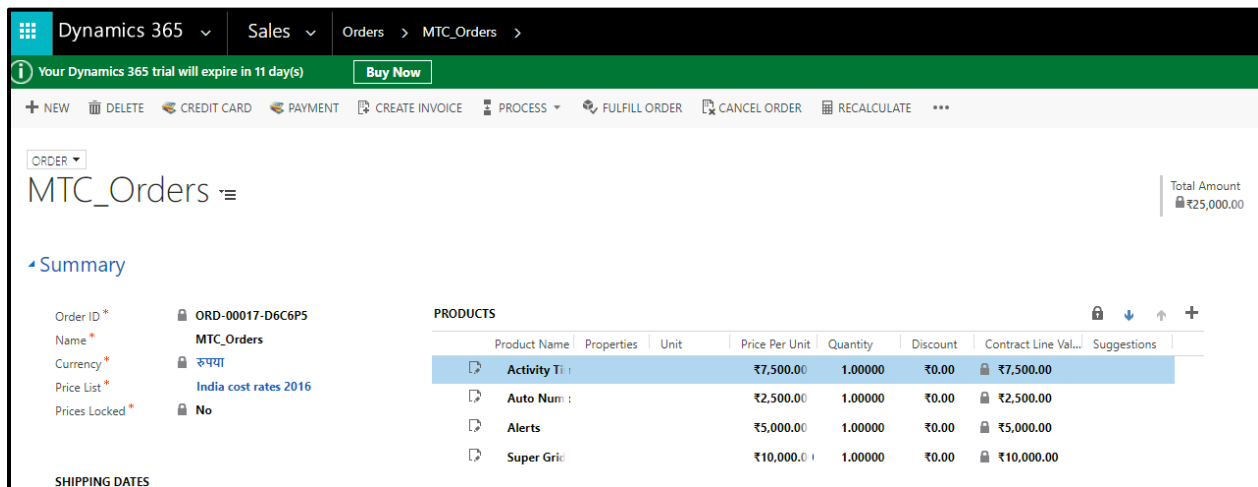# Purchase Manager Functionality

Step1:

➢ Navigate to **Dynamics 365 → Sales → Orders.**
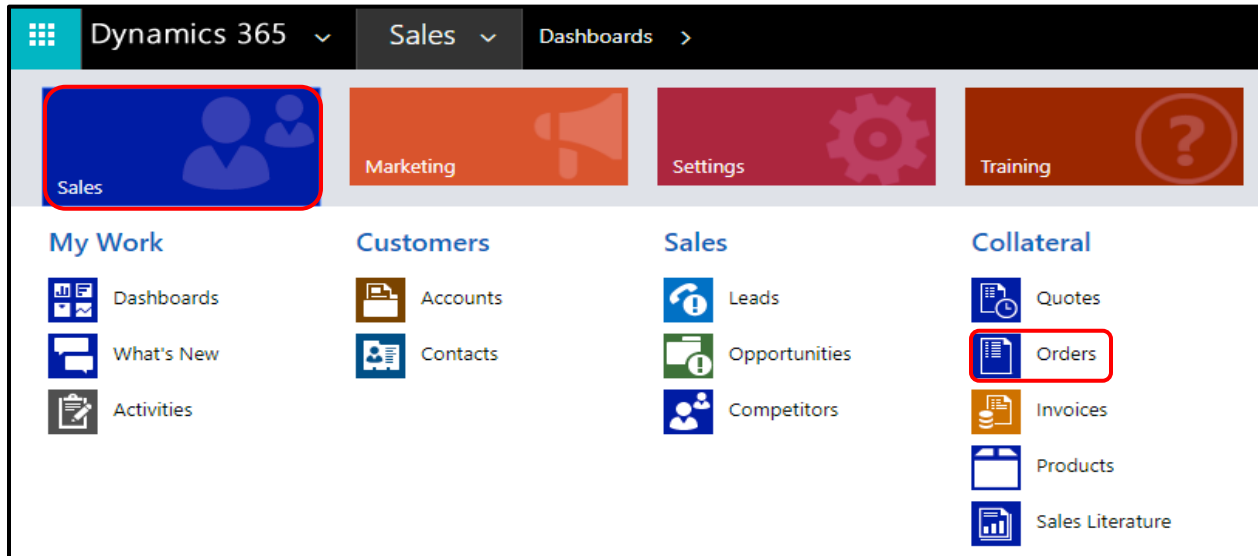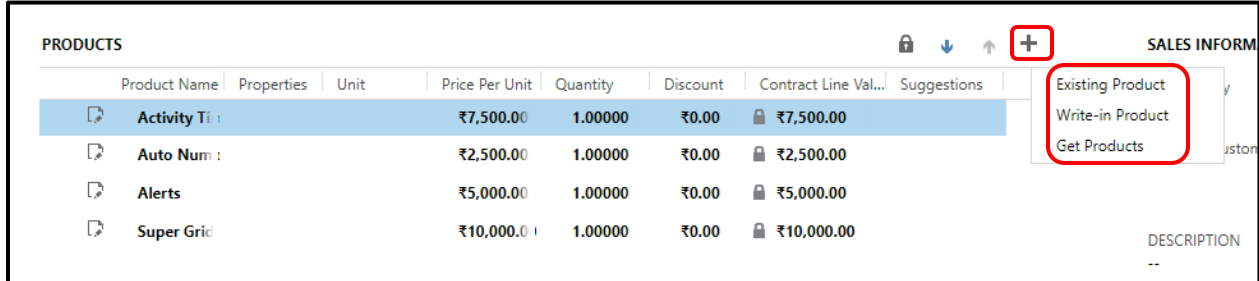
Step2:

➢ For New Orders give general information as name, Customer, Price list, currency, etc.

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Step3:

- ➢ Click on '**+**' to Add New Products, on selecting Existing or write-in or Get Product and continue to add products.
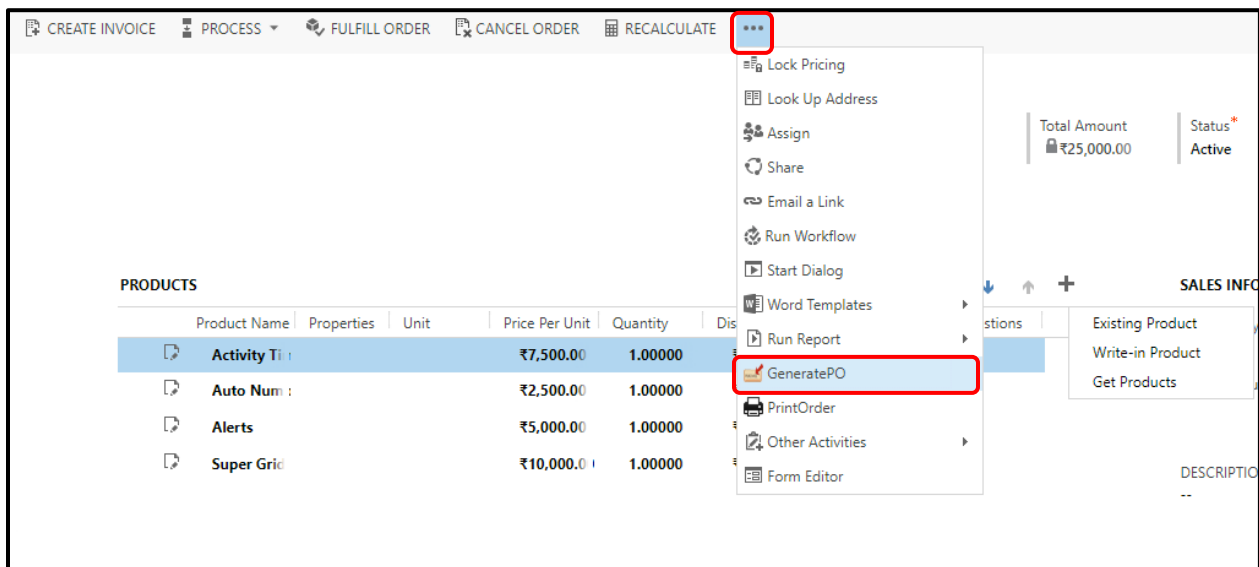

- ➢ Select the Product either Write In or Existing Product or Get Product.
- ➢ For Write in Add the Product name and give the information as Price Per unit, quantity etc.
- ➢ For Existing Product with the help of look up select the product.

Step4:

- ➢ After adding the Order Products to generate the Purchase Order click on **GeneratePO** which is available at **more CRM ribbon button** as shown below.

Step5:

- ➢ Generate Purchase Order window page will open. You can select the supplier by selecting the **look up** icon or else select the Product and click on **Set Suppliers**.
- ➢ By clicking on the Set Supplier button look up record window will open. Only the accounts having relationship type as Supplier will be displayed here.
- ➢ You can also select the supplier with the help of Look up icon which is placed at the right most end of the row.
- ➢ Tick the check boxes for which purchase order you want to create PO.

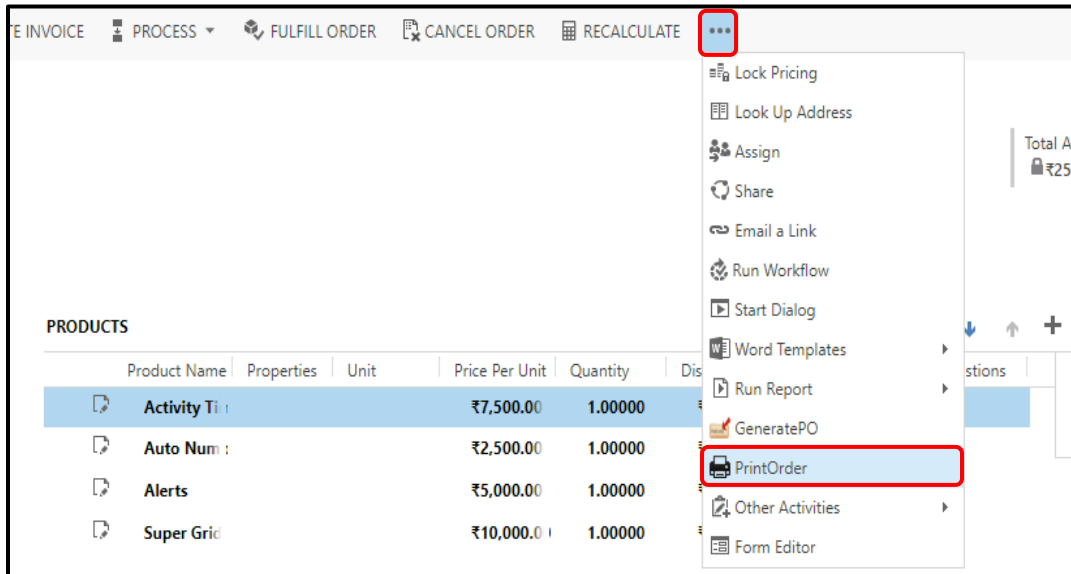|	Existing Product	Description	Price Per Unit	Cost	Quantity *	Contract Line Value	Supplier		
✔	⊘		⊘₹10,000.0	₹10,000.00	⊘1.00000	₹10,000.00	A. Datum	🔍	
✔	⊘		⊘₹5,000.0	₹5,000.00	⊘1.00000	₹5,000.00	A. Datum		
✔	⊘		⊘₹2,500.0	₹2,500.00	⊘1.00000	₹2,500.00	A. Datum		
✔	⊘		⊘₹7,500.0	₹7,500.00	⊘1.00000	₹7,500.00	Adventure Works		

Set Supplier

Create PO

Step6:

- ➢ Once all the required products are selected click on **Create PO** to generate PO.
- ➢ It display a message 'Creating Purchase Order'. Purchase Orders will be created and visible as created P/O's as shown below.
- ➢ Every Purchase Order name will be created Prefix as PO – Order Name – supplier name as per defined in the configuration page.
- ➢ Purchase order is created based on the supplier. For example, if 3 order has the same supplier then purchase order will be created as 1 with order list of 3 products.

Name	Created On
PO - A. Datum	11-10-2017 04:34
PO - Adventure Works	11-10-2017 04:34

Step7:

➢ Click on more (**…**) to get a drop down list.
➢ Select **PrintOrder** option to Print the Purchase Order

Step8:

➢ You can get **Purchase Order Invoice** by selecting on **PrintOrder.**

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MTC

righrggg4g8,h
ih8h8h,h
Phone:844949494
Fax:5848416494

Purchase Order

Date	P.O.Number
09/10/2017	ORD-00017-D6C6P5

Vendor:
A. Datum
Magui Lan
Guangzhou,Guangdong 650031
Republic of China

Ship Via	**Desired Ship Date**

Shipto

Description / Part Number	Quantity	Net each	Net Amount
Auto Number	1	2500.00	2500.00
Alerts	1	5000.00	5000.00
Activity Timer	1	7500.00	7500.00
Super Grid	1	10000.00	10000.00
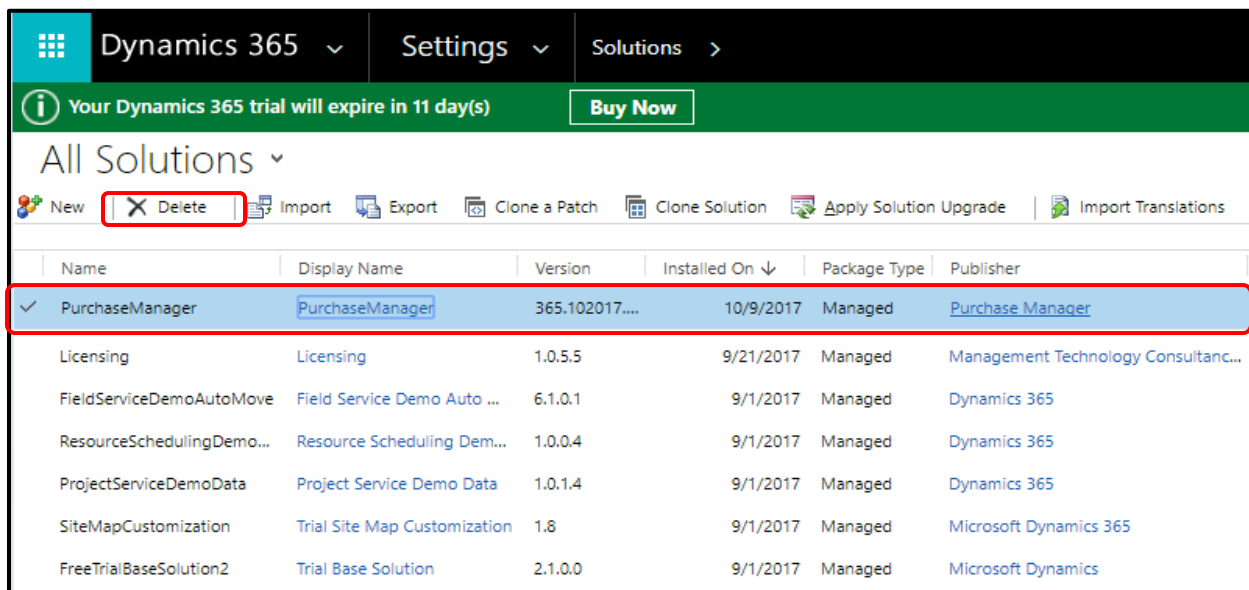
Ordered by: Mohit Marothia

Sub Total	₹25000.00
P/O Discount	₹0
P/O Tax	₹0
Shipping	₹0
Total	₹25000.00

How to Uninstall Purchase Manager in your Dynamics 365?

Step1:

➤ Navigate to Dynamics 365 → Settings → Solutions.
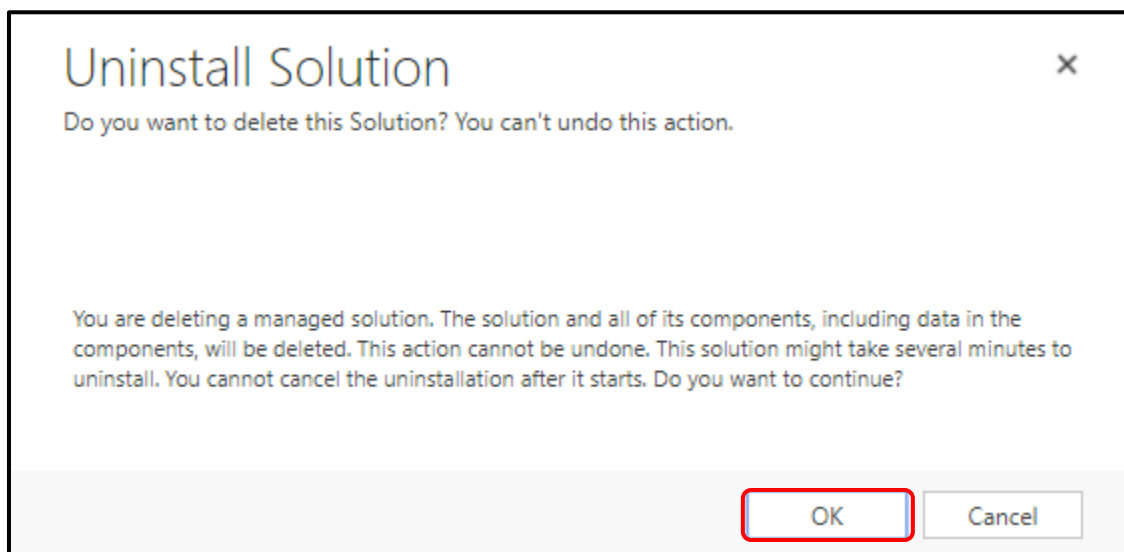➤ Click on **Purchase Manager Solution** and click on **Delete**.

Step2:

➤ Click on **OK** to delete the Purchase Manager Solution.

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