

User Guide



Purchase Manager

For Microsoft Dynamics 365 / CRM

Document Version: 1.0

Solution Version: 365_102017_3_4

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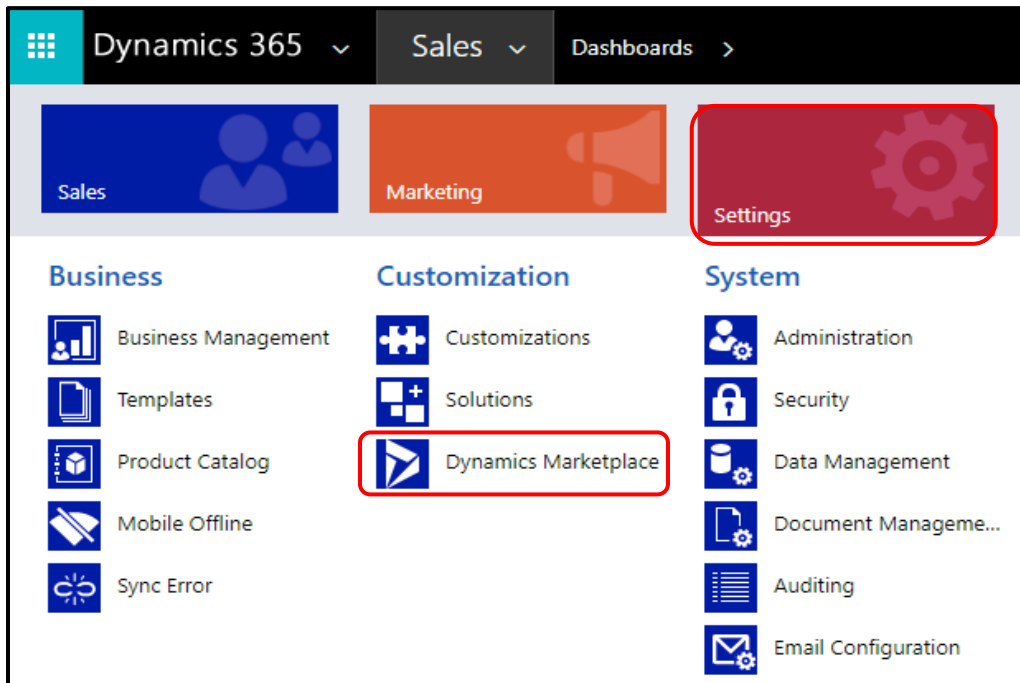
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How to Install Purchase Manager in your Dynamics 365?

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

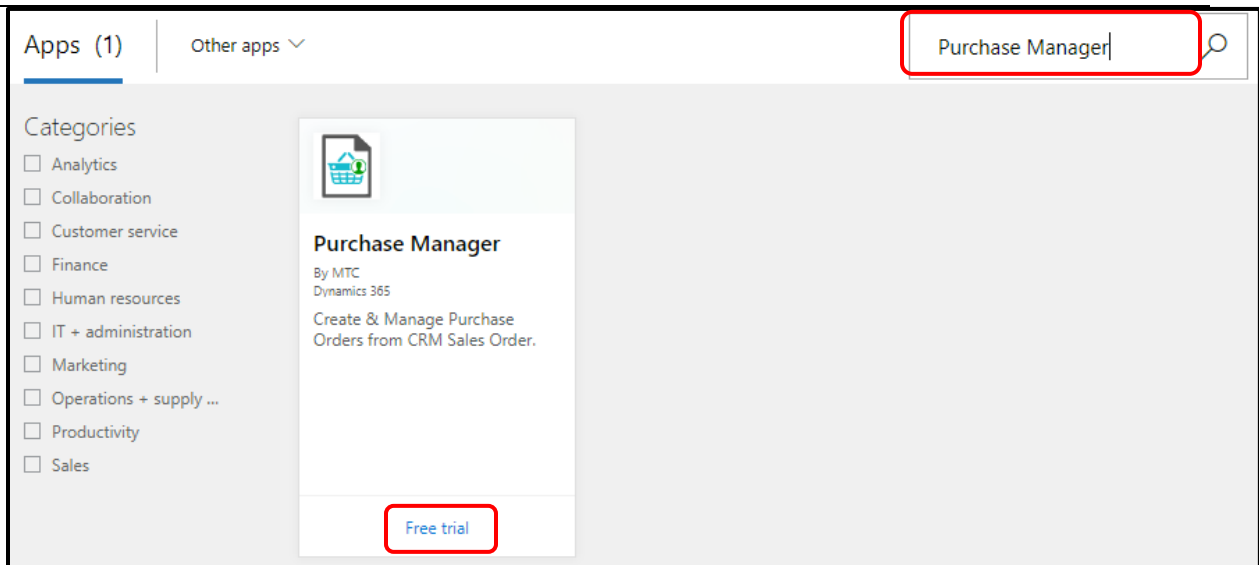
Step1:

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



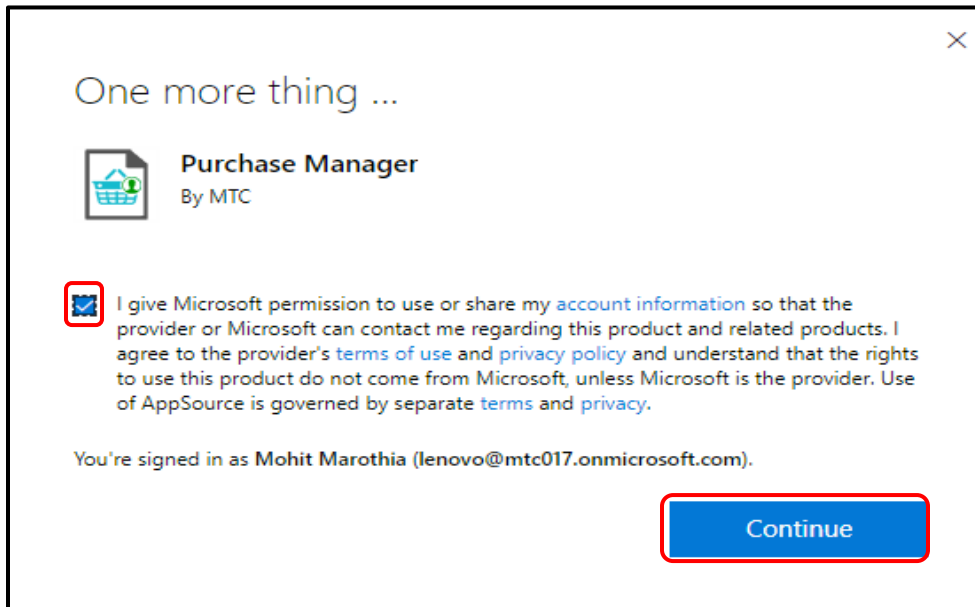
Step2:

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



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.

Add the application to Dynamics 365

Select the Dynamics 365 organization you want to add this application to.

Connect to Dynamics 365

Organization to add the application to: MTC (orgd1ffb4b4)

☒ Agree to Microsoft's [Legal Terms](#) and [Privacy Statement](#)

☒ Agree to [Privacy Statement](#) and [Legal Terms](#) for importing solutions into Dynamics 365

Agree
Cancel

Step5:

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

| | | | |
|-------------------------------|---------------|----------|---------------|
| Office 365 Groups | 2.8.0.0 | 1/1/2050 | Not installed |
| Project Service Automation | 1.2.1.56 | 1/1/2050 | Not installed |
| PurchaseManager | 365.62017.3.5 | 1/1/2050 | Installing |
| Voice of the Customer for ... | 9.0.925.5 | 1/1/2050 | Not installed |

- 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**.

All Solutions ▾

New | Delete | Import | Export | Clone a Patch | Clone Solution | Apply Solution Upgrade | Import Translations

| Name | Display Name | Version | Installed On ▾ | Package Type | Publisher |
|---------------------------|------------------------------|----------------|----------------|--------------|-------------------------------------|
| PurchaseManager | PurchaseManager | 365.062017.... | 10/4/2017 | Managed | Purchase Manager |
| ✓ Licensing | Licensing | 1.0.5.5 | 9/20/2017 | Managed | Management Technology Consultanc... |
| MTC_CreditCardProcessing | MTC Credit Card Processing | 365.092017.... | 9/20/2017 | Managed | Management Technology Consultanc... |
| FieldServiceDemoAutoMove | Field Service Demo Auto ... | 6.1.0.1 | 9/1/2017 | Managed | Dynamics 365 |
| ResourceSchedulingDemo... | Resource Scheduling Dem... | 1.0.0.4 | 9/1/2017 | Managed | Dynamics 365 |
| ProjectServiceDemoData | Project Service Demo Data | 1.0.1.4 | 9/1/2017 | Managed | Dynamics 365 |
| SiteMapCustomization | Trial Site Map Customization | 1.8 | 9/1/2017 | Managed | Microsoft Dynamics 365 |
| FreeTrialBaseSolution2 | Trial Base Solution | 2.1.0.0 | 9/1/2017 | Managed | Microsoft Dynamics |

- 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."

LICENSE INFORMATION

| | | | |
|---------------------------------------|------------|------------------|------------------|
| First Name* | Mohit | Last Name* | Marothia |
| Phone* | 1234567892 | Company* | www.mtccrm.com |
| Website* | mtccrm.com | Email* | mohit@mtccrm.com |
| City* | hyderabad | State/Province* | ts |
| Country* | india | Zip/Postal Code* | 500050 |
| <input type="button" value="Submit"/> | | | |

- 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**.

| 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 |

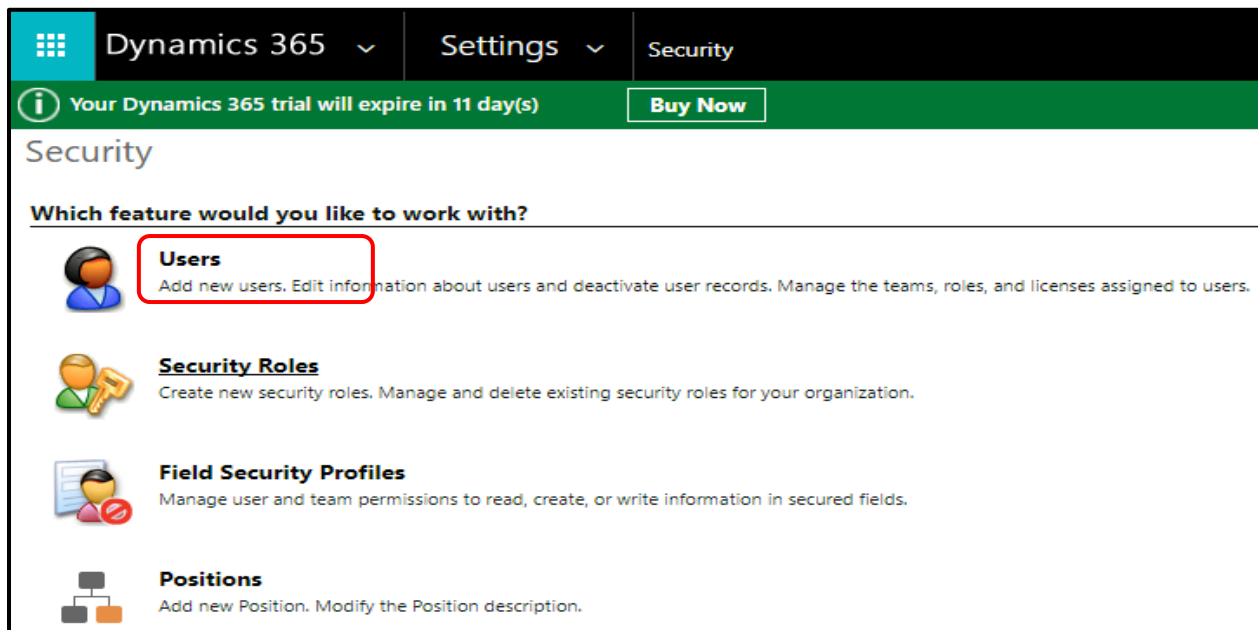
Note: The free trial license key is generated and activated on the first use of the product.

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.

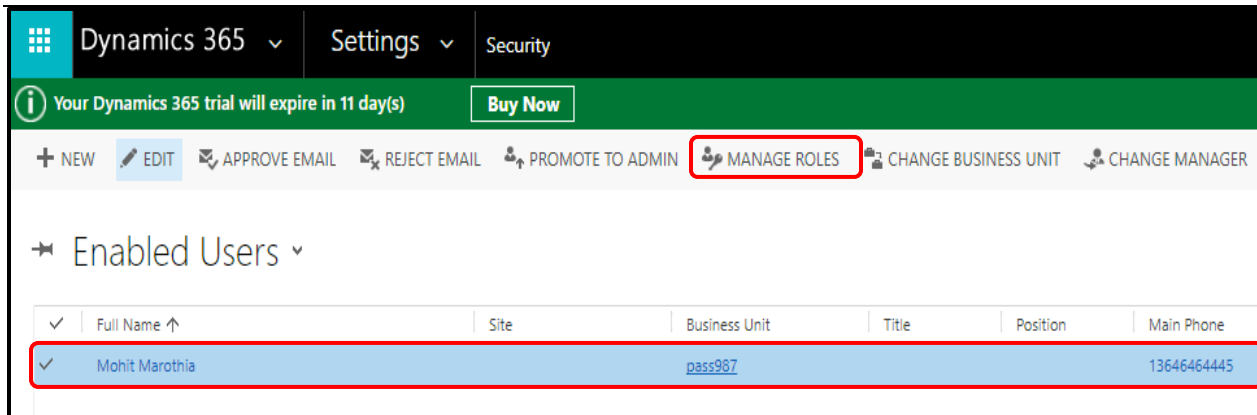
Step1:

- 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.



Dynamics 365 Settings Security

Your Dynamics 365 trial will expire in 11 day(s) [Buy Now](#)

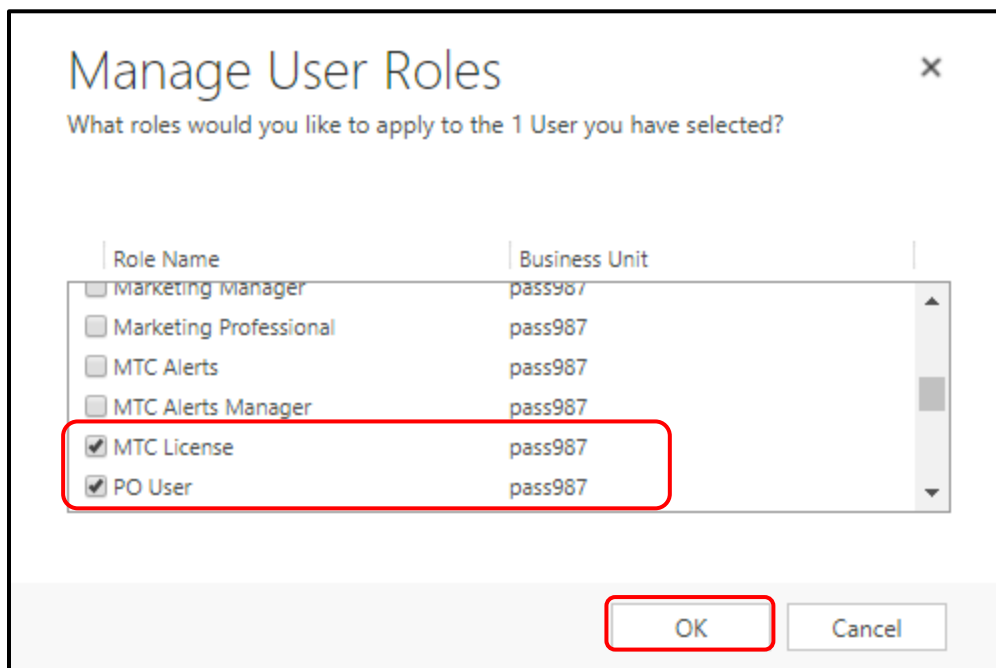
+ NEW EDIT APPROVE EMAIL REJECT EMAIL PROMOTE TO ADMIN **MANAGE ROLES** CHANGE BUSINESS UNIT CHANGE MANAGER

Enabled Users

| ✓ | Full Name ↑ | Site | Business Unit | Title | Position | Main Phone |
|---|----------------|------|---------------|-------|----------|------------|
| ✓ | Mohit Marothia | | pass987 | | | 1364646445 |

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.



Manage User Roles

What roles would you like to apply to the 1 User you have selected?

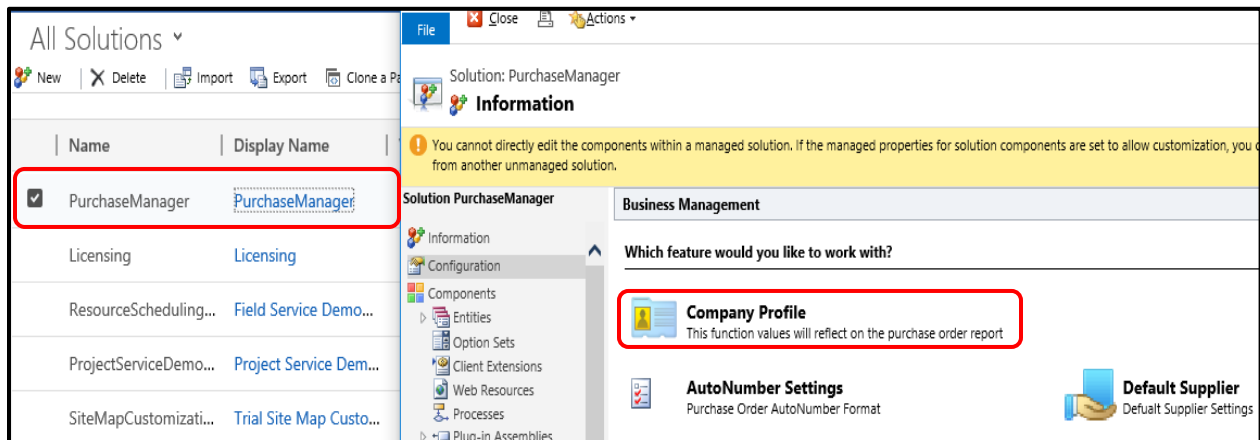
| Role Name | Business Unit |
|---|---------------|
| <input type="checkbox"/> Marketing Manager | pass987 |
| <input type="checkbox"/> Marketing Professional | pass987 |
| <input type="checkbox"/> MTC Alerts | pass987 |
| <input type="checkbox"/> MTC Alerts Manager | pass987 |
| <input checked="" type="checkbox"/> MTC License | pass987 |
| <input checked="" type="checkbox"/> PO User | pass987 |

OK Cancel

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.

Profile
Company Information

General

Company Name:

Phone Number:

Fax:

Address

Street1: City:

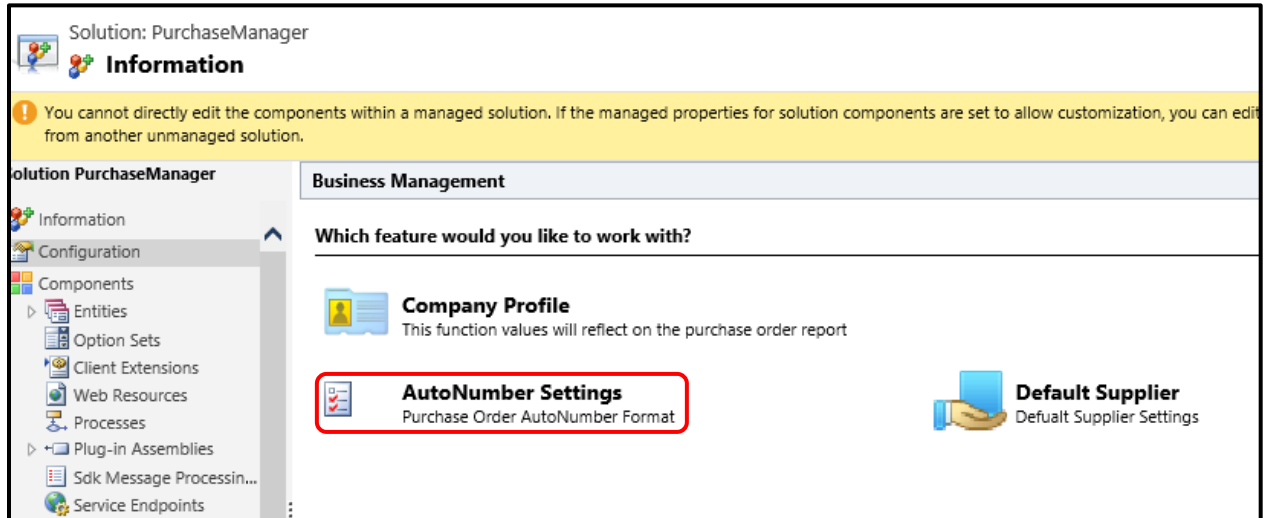
Street2: State/Province:

Street3: Country/Region:

ZIP/Postal Code:


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


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 Processing...



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

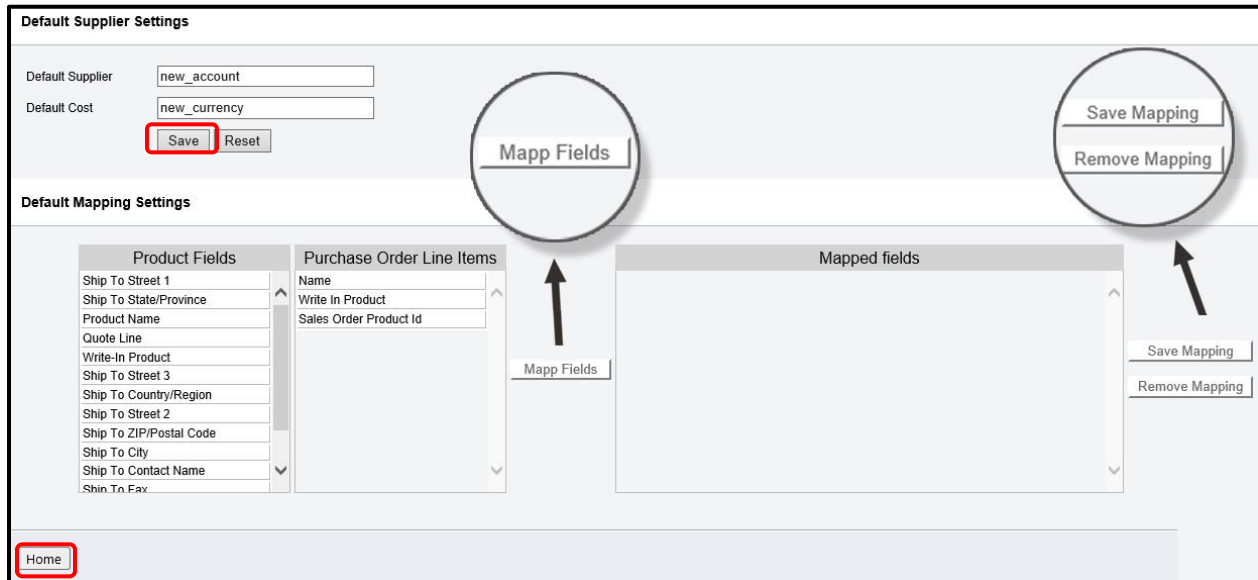
Purchase Order AutoNumber Format


Default Supplier

Default Supplier Settings

- Copyright © 2017 Management Technology Consulting LLC

- **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**.



Default Supplier Settings

Default Supplier:

Default Cost:

Default Mapping Settings

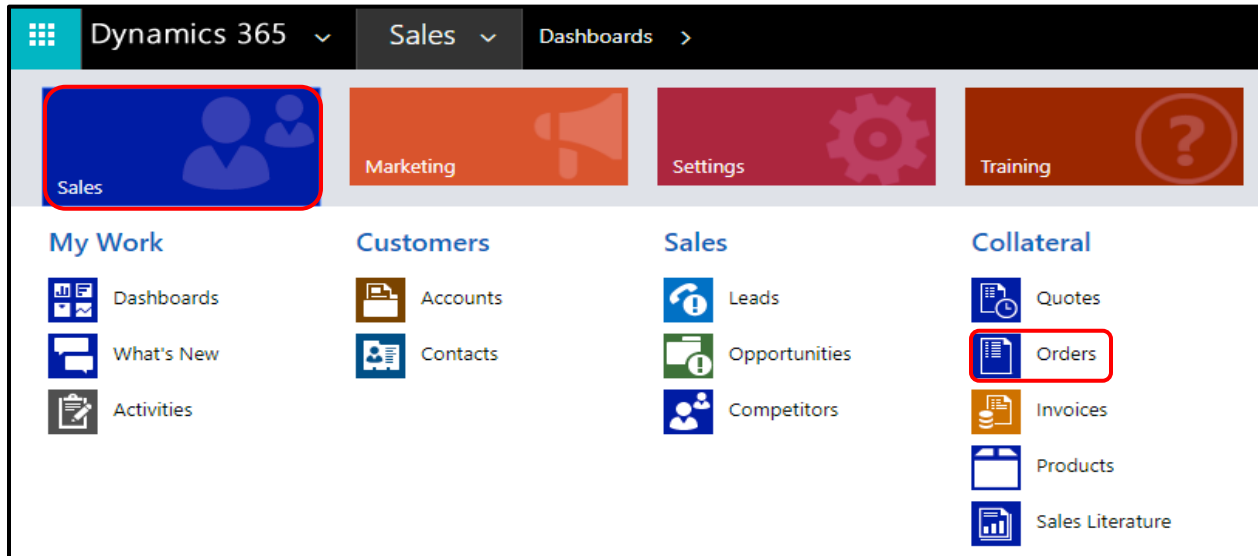
| Product Fields | Purchase Order Line Items | Mapped fields |
|-------------------------|---------------------------|---------------|
| Ship To Street 1 | Name | |
| Ship To State/Province | Write In Product | |
| Product Name | Sales Order Product Id | |
| Quote Line | | |
| Write-In Product | | |
| Ship To Street 3 | | |
| Ship To Country/Region | | |
| Ship To Street 2 | | |
| Ship To ZIP/Postal Code | | |
| Ship To City | | |
| Ship To Contact Name | | |
| Ship To Fax | | |

- 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.

Purchase Manager Functionality

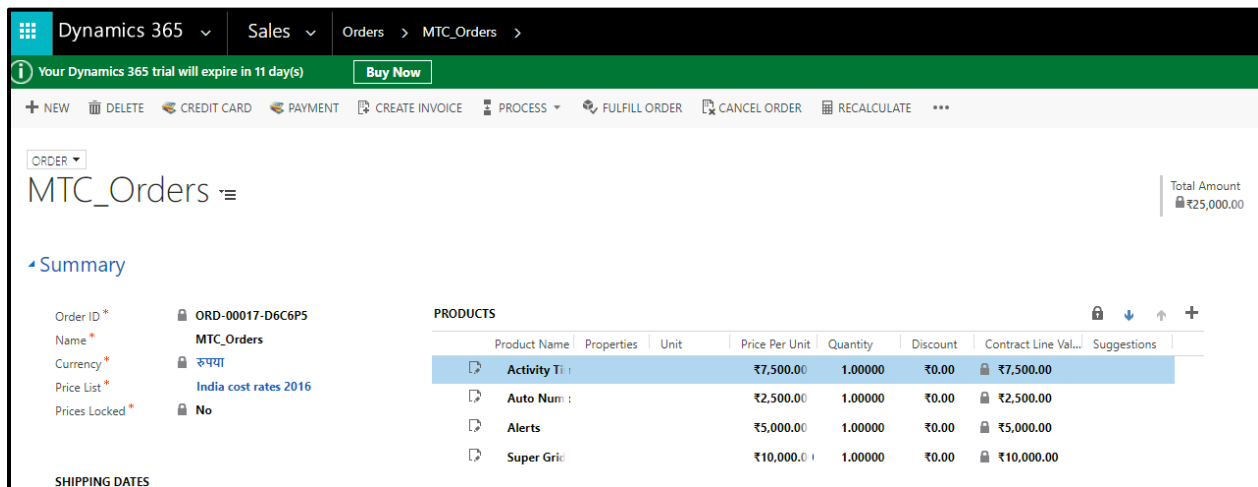
Step1:

- Navigate to Dynamics 365 → Sales → Orders.



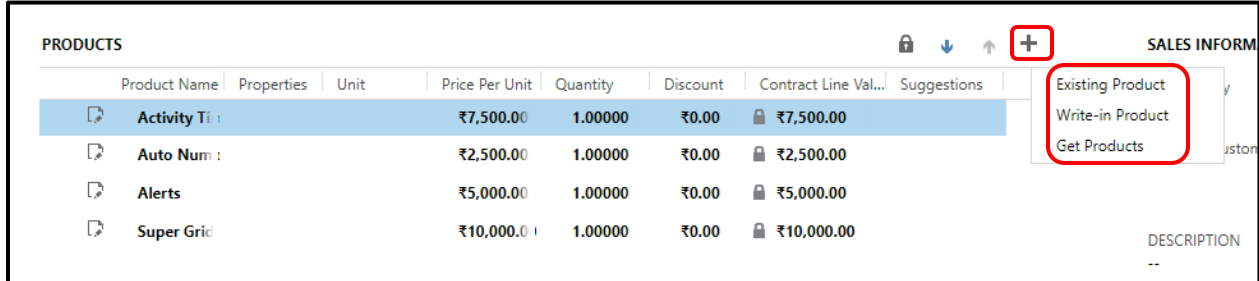
Step2:

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



Step3:

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

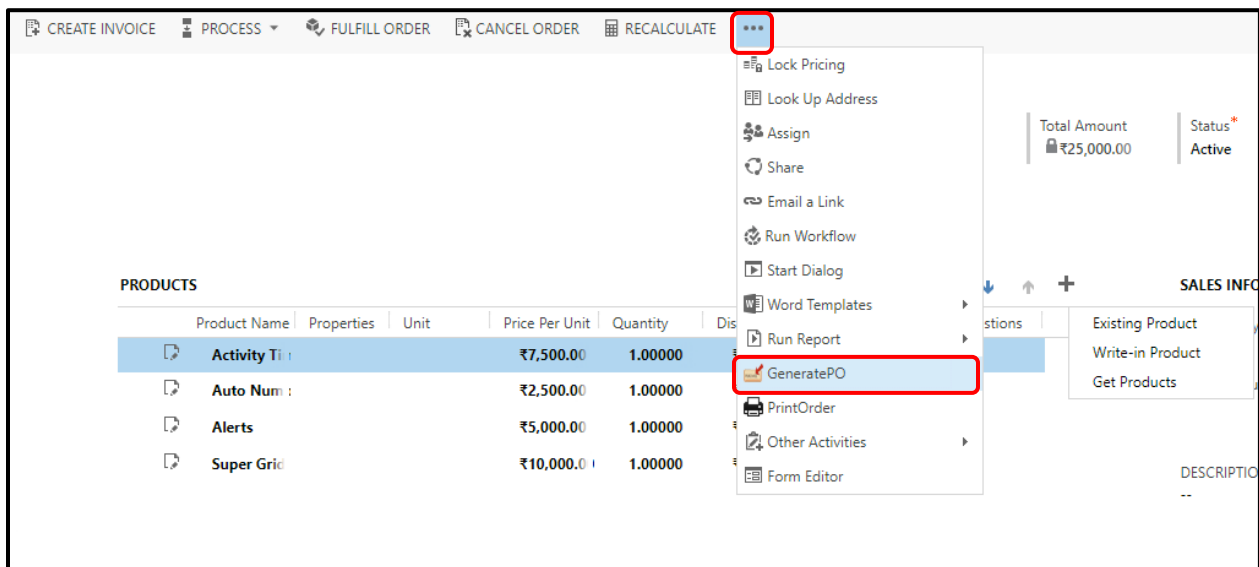


| Product Name | Properties | Unit | Price Per Unit | Quantity | Discount | Contract Line Val... | Suggestions |
|--------------|------------|------|----------------|----------|----------|----------------------|-------------|
| Activity Ti | | | ₹7,500.00 | 1.00000 | ₹0.00 | ₹7,500.00 | |
| Auto Num : | | | ₹2,500.00 | 1.00000 | ₹0.00 | ₹2,500.00 | |
| Alerts | | | ₹5,000.00 | 1.00000 | ₹0.00 | ₹5,000.00 | |
| Super Grid | | | ₹10,000.00 | 1.00000 | ₹0.00 | ₹10,000.00 | |

- 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.









| Product Name | Properties | Unit | Price Per Unit | Quantity | Dis |
|--------------|------------|------|----------------|----------|-----|
| Activity Ti | | | ₹7,500.00 | 1.00000 | |
| Auto Num : | | | ₹2,500.00 | 1.00000 | |
| Alerts | | | ₹5,000.00 | 1.00000 | |
| Super Grid | | | ₹10,000.00 | 1.00000 | |

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.

Set Supplier

| <input checked="" type="checkbox"/> | Existing Product | Description | Price Per Unit | Cost | Quantity * | Contract Line Value | Supplier |  |
|-------------------------------------|---|-------------|----------------|------------|------------|---------------------|-----------------|---|
| <input checked="" type="checkbox"/> |  | | ₹10,000.0 | ₹10,000.00 | 1.00000 | ₹10,000.00 | A. Datum |  |
| <input checked="" type="checkbox"/> |  | | ₹5,000.0 | ₹5,000.00 | 1.00000 | ₹5,000.00 | A. Datum | |
| <input checked="" type="checkbox"/> |  | | ₹2,500.0 | ₹2,500.00 | 1.00000 | ₹2,500.00 | A. Datum | |
| <input checked="" type="checkbox"/> |  | | ₹7,500.0 | ₹7,500.00 | 1.00000 | ₹7,500.00 | Adventure Works | |

Create PO

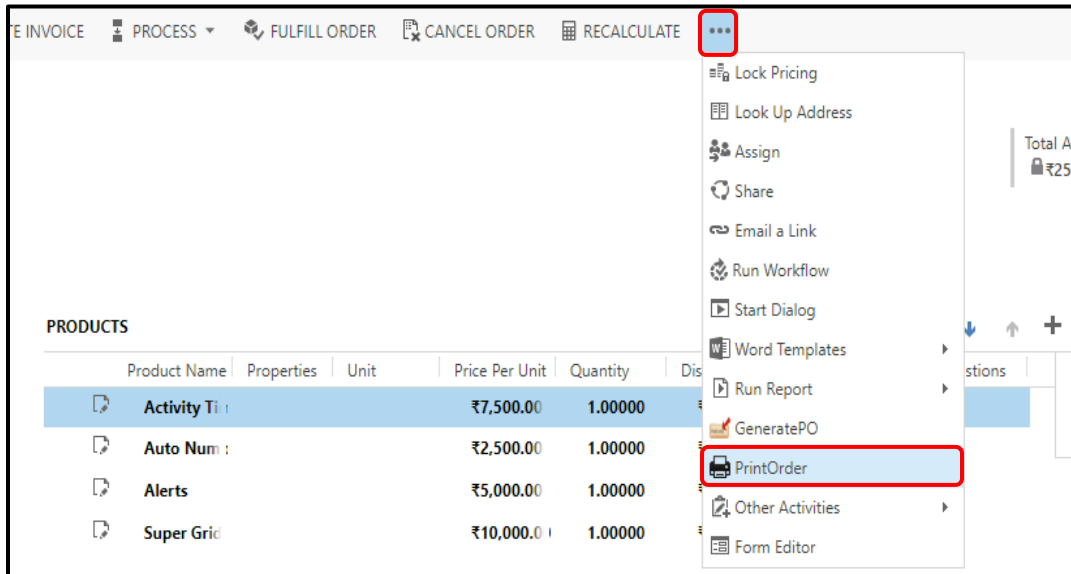
Step6:

- 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



The screenshot shows the Purchase Manager interface. At the top, there is a toolbar with buttons: 'NEW INVOICE', 'PROCESS', 'FULFILL ORDER', 'CANCEL ORDER', and 'RECALCULATE'. A red box highlights the 'more' icon (three dots) next to 'RECALCULATE'. A dropdown menu is open, showing various options: 'Lock Pricing', 'Look Up Address', 'Assign', 'Share', 'Email a Link', 'Run Workflow', 'Start Dialog', 'Word Templates', 'Run Report', 'GeneratePO', 'PrintOrder' (highlighted with a red box), 'Other Activities', and 'Form Editor'. Below the toolbar, there is a table titled 'PRODUCTS' with columns: 'Product Name', 'Properties', 'Unit', 'Price Per Unit', 'Quantity', and 'Dis'. The table contains four rows of data:

| Product Name | Properties | Unit | Price Per Unit | Quantity | Dis |
|--------------|------------|------|----------------|----------|-----|
| Activity Ti | | | ₹7,500.00 | 1.00000 | |
| Auto Num | | | ₹2,500.00 | 1.00000 | |
| Alerts | | | ₹5,000.00 | 1.00000 | |
| Super Grid | | | ₹10,000.00 | 1.00000 | |

On the right side of the interface, there is a 'Total A' label with a lock icon and the value '₹25'.

Step8:

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



1 of 1

Find | Next

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

Shipto

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 |
| | |

| 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 |

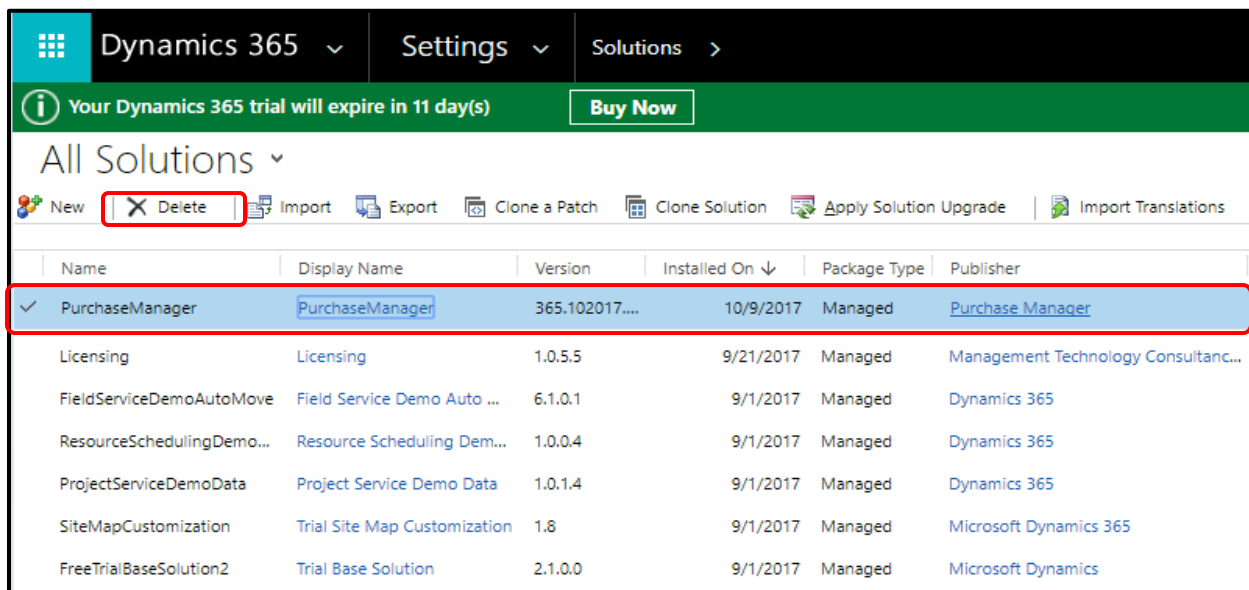
Ordered by: Mohit Marothia

| | |
|--------------|-----------|
| 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**.

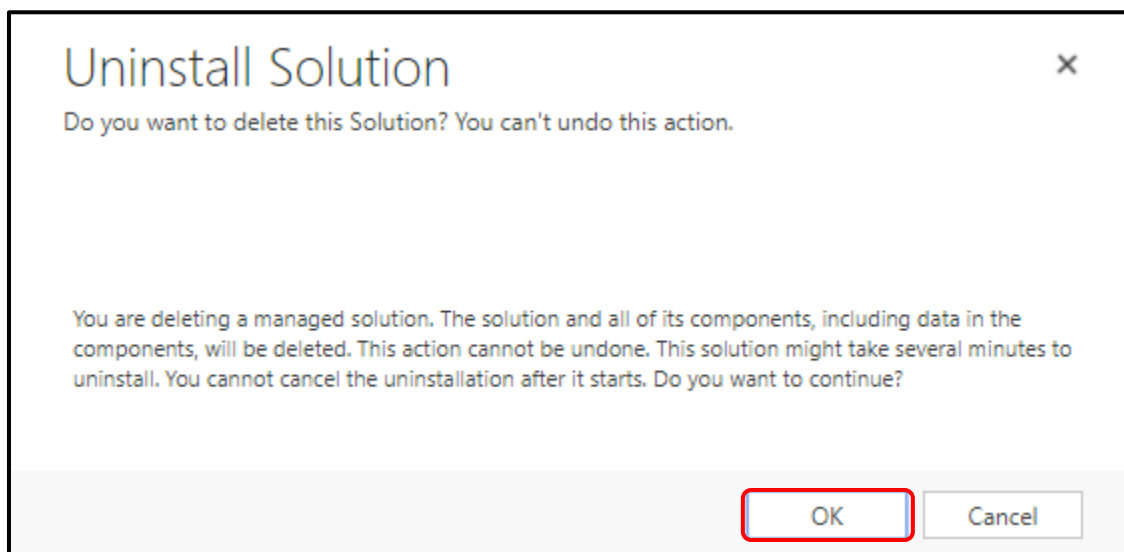


The screenshot shows the Dynamics 365 interface with the 'Solutions' tab selected. A green banner at the top indicates 'Your Dynamics 365 trial will expire in 11 day(s)' with a 'Buy Now' button. Below the banner, the 'All Solutions' section is visible. A red box highlights the 'Delete' button in the top toolbar. Another red box highlights the 'PurchaseManager' solution in the table below.

| Name | Display Name | Version | Installed On ↓ | Package Type | Publisher |
|---------------------------|------------------------------|----------------|----------------|--------------|-------------------------------------|
| ✓ PurchaseManager | PurchaseManager | 365.102017.... | 10/9/2017 | Managed | Purchase Manager |
| Licensing | Licensing | 1.0.5.5 | 9/21/2017 | Managed | Management Technology Consultanc... |
| FieldServiceDemoAutoMove | Field Service Demo Auto ... | 6.1.0.1 | 9/1/2017 | Managed | Dynamics 365 |
| ResourceSchedulingDemo... | Resource Scheduling Dem... | 1.0.0.4 | 9/1/2017 | Managed | Dynamics 365 |
| ProjectServiceDemoData | Project Service Demo Data | 1.0.1.4 | 9/1/2017 | Managed | Dynamics 365 |
| SiteMapCustomization | Trial Site Map Customization | 1.8 | 9/1/2017 | Managed | Microsoft Dynamics 365 |
| FreeTrialBaseSolution2 | Trial Base Solution | 2.1.0.0 | 9/1/2017 | Managed | Microsoft Dynamics |

Step2:

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



The screenshot shows the 'Uninstall Solution' dialog box. The title is 'Uninstall Solution' with a close button (X) in the top right corner. The main text asks: 'Do you want to delete this Solution? You can't undo this action.' Below this, a warning message states: 'You are deleting a managed solution. The solution and all of its components, including data in the components, will be deleted. This action cannot be undone. This solution might take several minutes to uninstall. You cannot cancel the uninstallation after it starts. Do you want to continue?' At the bottom right, there are two buttons: 'OK' and 'Cancel'. The 'OK' button is highlighted with a red box.