



Microsoft Dynamics CRM / XRM Platform



User Guide



CRM Versions Supported: CRM 2015 and CRM Online

Sales Product Editor is Product Transaction Editor for Microsoft Dynamics CRM 2015 and CRM Online. As the one-page quote process, that works from opportunity to quote, to order, to invoice. An Excel-like record adding grid saves time and clicks.

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Product Overview

Sales Product Editor for Microsoft Dynamics CRM 2015 and CRM Online is an easy add-in for making existing CRM View listings Excel-like to allow in-place editing to save lots of time and clicks! Works on any CRM standard or custom grid and works with all field types. Settings area control and Security Role compliance allows easy configuration control and user editing privilege security. Alternately, “Editable Grid” is great for adding records in an Excel-like grid with just a click away.

Add new records without opening any new windows or forms and without ever leaving the list. Multiple new rows be added at once and the user can modify existing rows at the same time, saving all of their changes with one click. Default Values and Event-based fields formerly restricted. User Input screens can now be configured for new Sales Product Editor rows. Placing the cursor on any CRM record column and row combination “Cell” just like in Microsoft Excel allows easy editing in all directions using the standard keyboard movement controls. Sales Product Editor has ability to build data sets easily in all areas of CRM.

Sales Product Editor is excellent for data building and manipulation in CRM functions like Quote Product entry where Existing and Write-in products be added simultaneously to a section you place on your CRM forms appropriate to your business process needs. The new Excel-like grid opens up a new blank bottom row after tabbing through the end of the columns. Easily edit any row after entry to more quickly build, review, and refine your complete set. Alternately, a similar product, “Editable Grid”, is great for editing records though out your existing standard or custom CRM View listings in any Entity in an Excel-like grid.

Add sales Product Editor to a few, many, most or all CRM View listing grids in accordance with how easy you want to avail in-place editing to your CRM users. Settings area control and Security Role compliance allows easy configuration control and user editing privilege security. It allows you enhanced user control of CRM data more appropriate, comfortable, and efficient for their periodic updating needs.

Sales Product Editor Allows Users to:

- Sales Administration will be delighted with the new ease of creating, and refining order-management documents quotes, orders, invoices.
- Sales staff appreciates the significant improvement and simplification of creating Quotes, Orders, and Invoices.
- Sales Management appreciates the general improvement in their ability to build data sets in all areas of CRM.
- The entire company benefits from the enhanced productivity of the sales department when Quote Product Editor increases efficiency

Key Benefits:

- Add and edit records faster than ever before for an instant gain in productivity!
- Add multiple new records without opening any new sub-windows or forms. Edited without ever leaving the grid to reduce substantially data entry time.
- Improved Data accuracy by ease of data correction thereby encouraging data error maintenance in all levels of the company, which improves the company image.
- Data formatting quality and uniformity greatly enhanced by the ability to audit and edit on the fly so easily improves marketing efforts and CRM User appreciation.
- The significant improvement in the efficiency of adding and editing records results in greater data sets being included in CRM resulting in more marketing reach, and improve sales.
- Working directly in CRM for building lists that used to be first in Excel and imported to CRM will bring an immediate ROI on the improvement of operations and speed to customer.
- Building custom CRM data entry and edit grid capability opens new CRM function opportunities well beyond all the standard CRM Entities to whole new ways of addressing unique business issues building ROI to the CRM investment itself.

Installation Process

To install the Sales Product Editor for CRM 2015 the following steps has to be followed

STEP 1:

- For free trial go to www.MTCCRM.com/SPE.aspx click on Download Solution.

STEP 2:

- After the download completes, a new window will open asking you permission to save the file Click on Save. It will save the file in location where you have specified to save.
- Extract the files from the folder where you saved. You will get two WINRAR ZIP files.
- On Downloading, you will get **SalesProductEditor.zip** (ZIP file).
- Extract the files from the downloaded folder. You will get two WINRAR ZIP files.



SalesProductEditor_2_0_4_0_managed.zip



Licensing_1_0_3_0_managed.zip

NOTE: To install the SALES PRODUCT EDITOR the above two files need to be imported into

STEP 3:

- To import the solution Open your CRM click on **SETTINGS→SOLUTION**

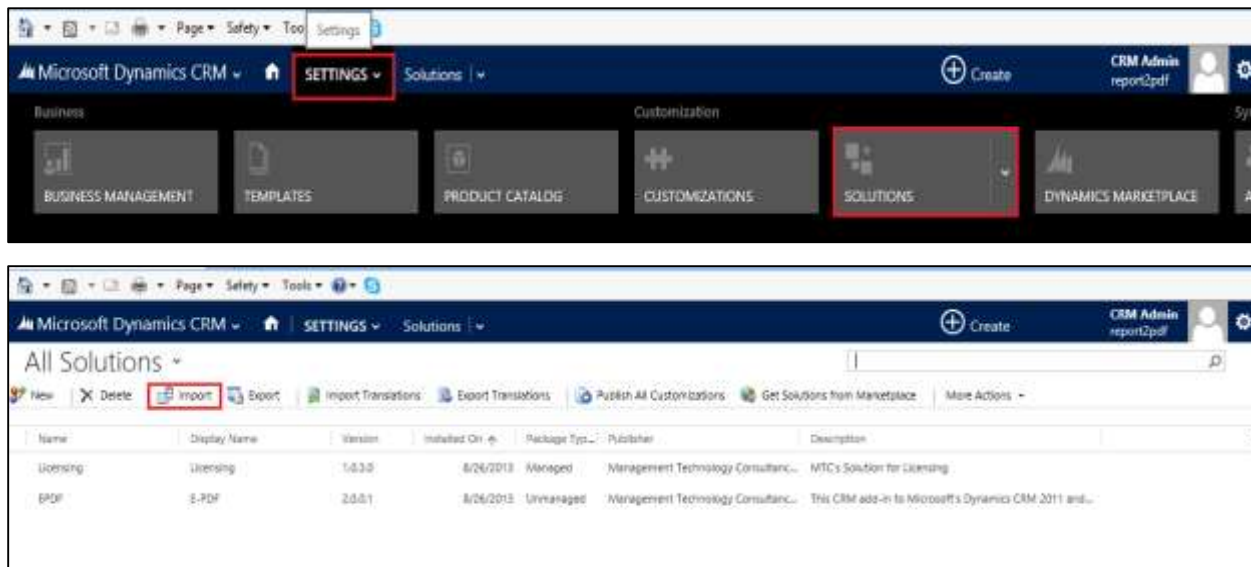


Figure 1: Import Solution

- In Import Solution Window you can browse and Select Solution Package zip file and then click on Next for further processing.
- First Install the Licensing Solution and later followed by Sales product Editor solution

Installing Licensing Solution

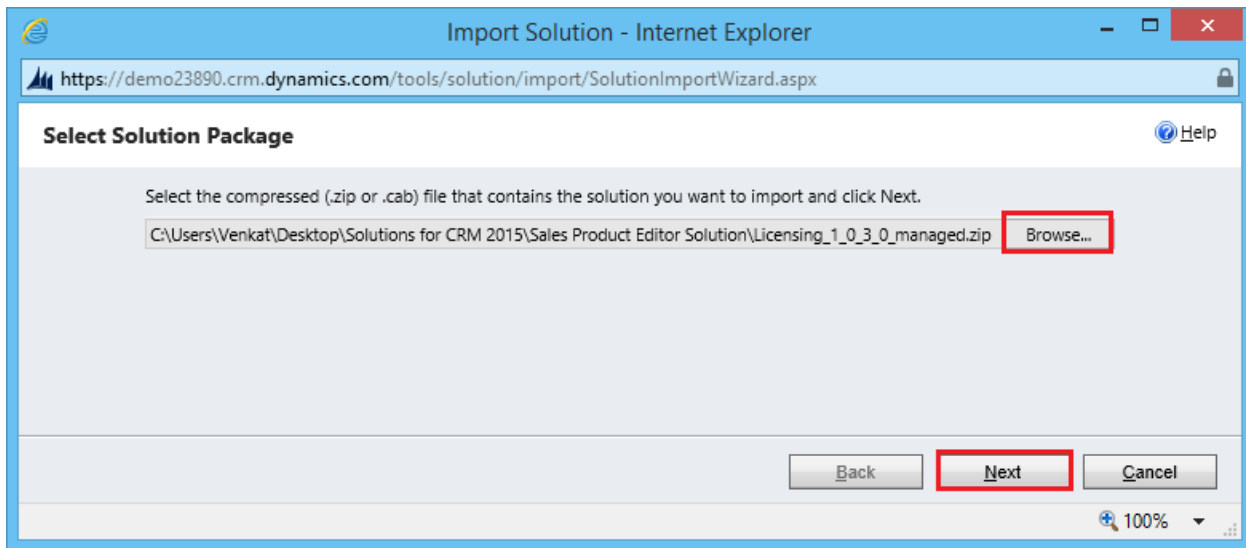


Figure 2 : Select Solution Package

- In Import Solution Window you can browse and Select Solution Package zip file and then click on Next for further processing.

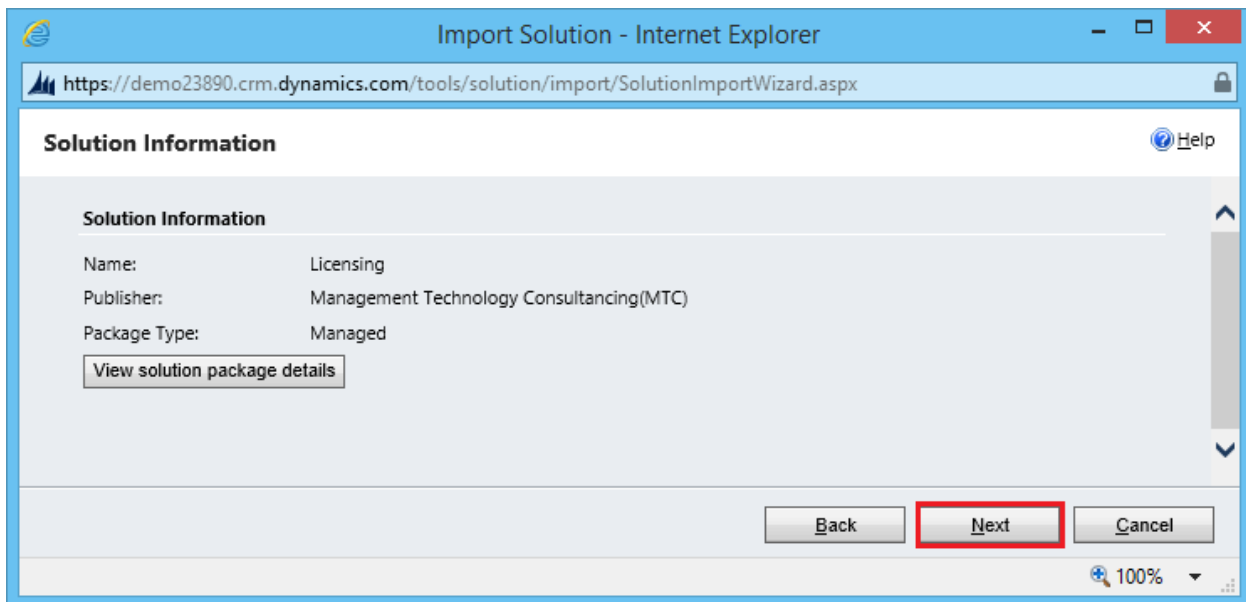


Figure 3: Importing Options window

- Click on Next to proceed

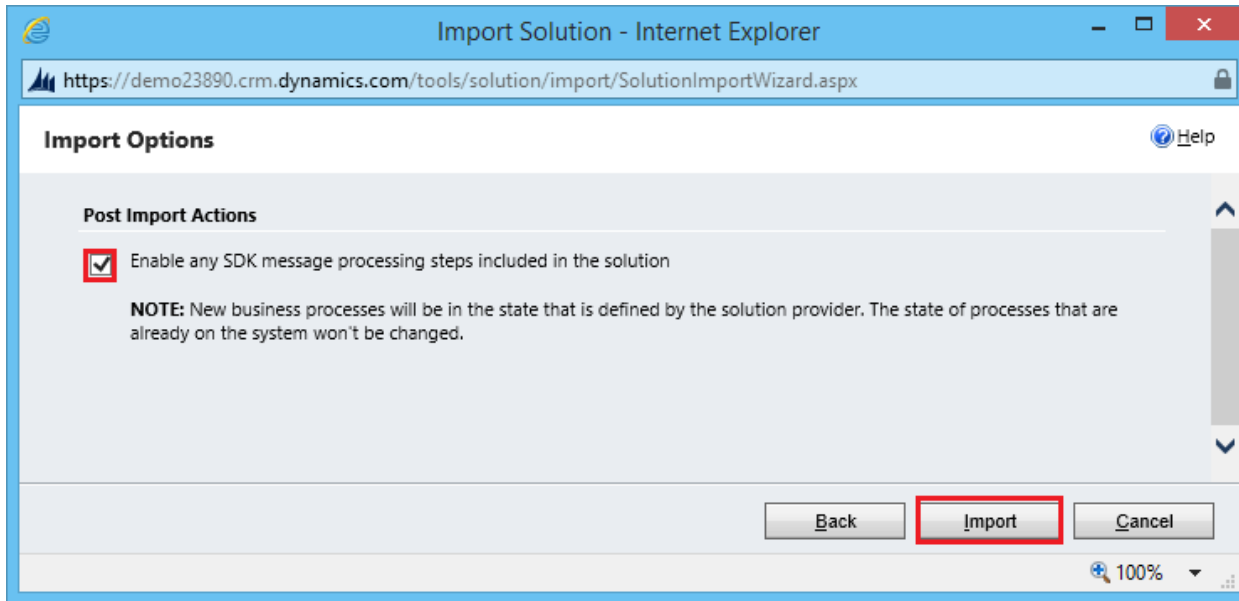


Figure 4: Import Option

- Click on Next to proceed

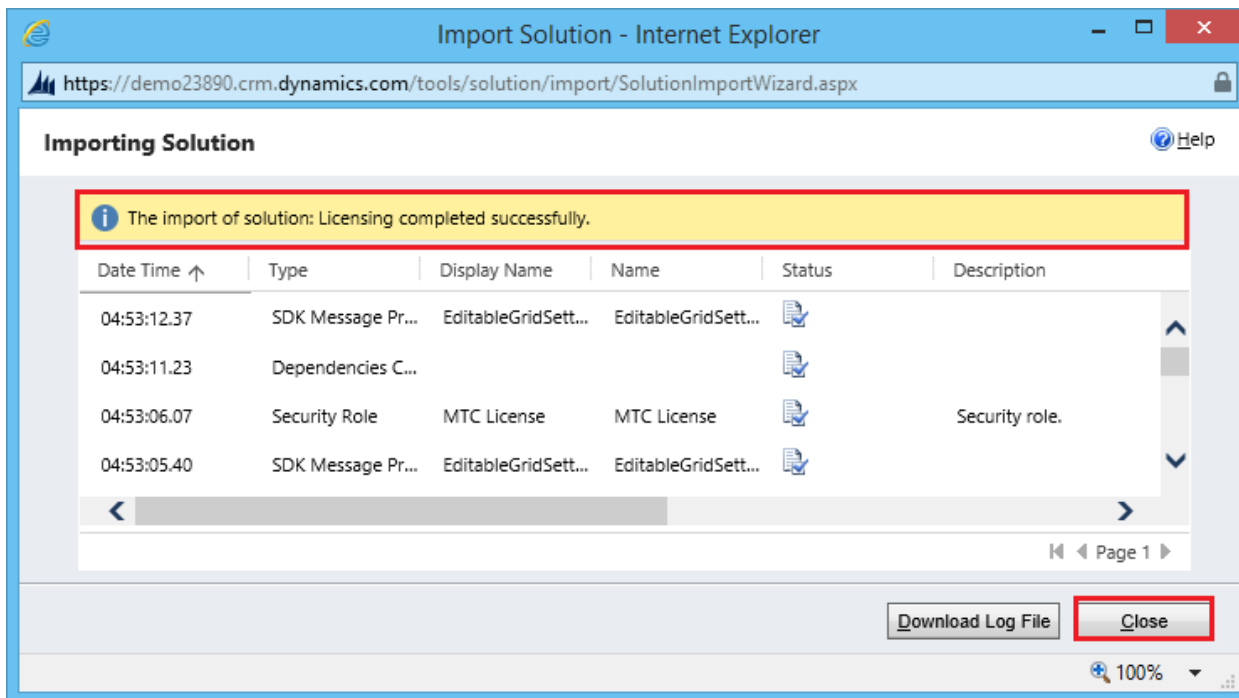


Figure 5: Importing Solution – Licensing

- Click on Close, on successful completion
- Message is displayed.

Installing Sales Product Editor Solution

- Now after importing the Licensing solution, install the Sales Product Editor Solution also.

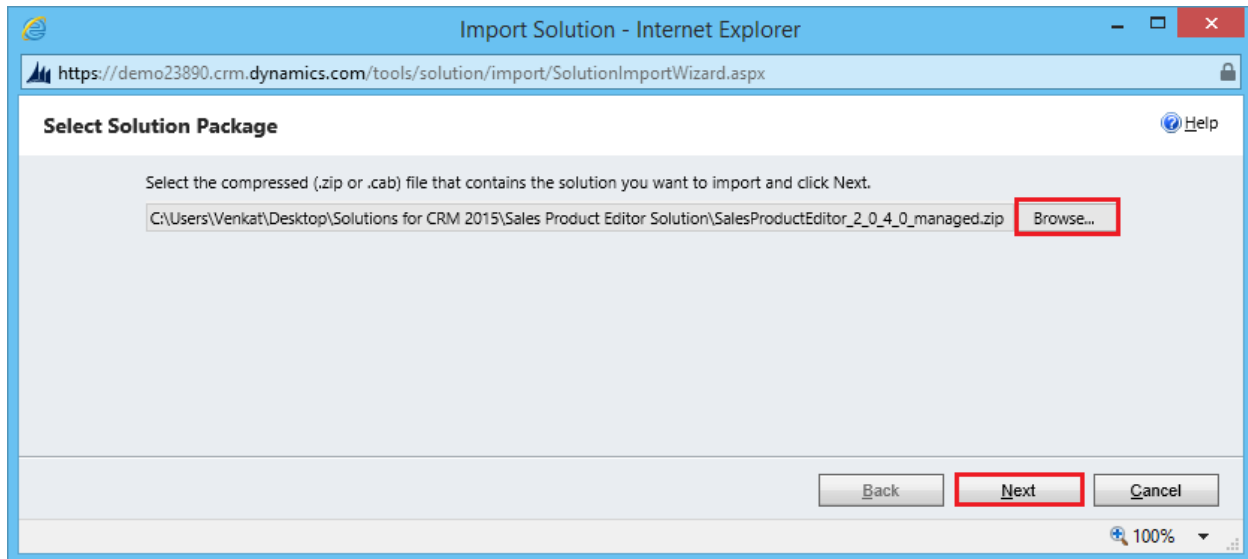


Figure 6: Select Solution Package

- Solution information window will open. It gives the solution package details and general information. Click on **Next** to continue.

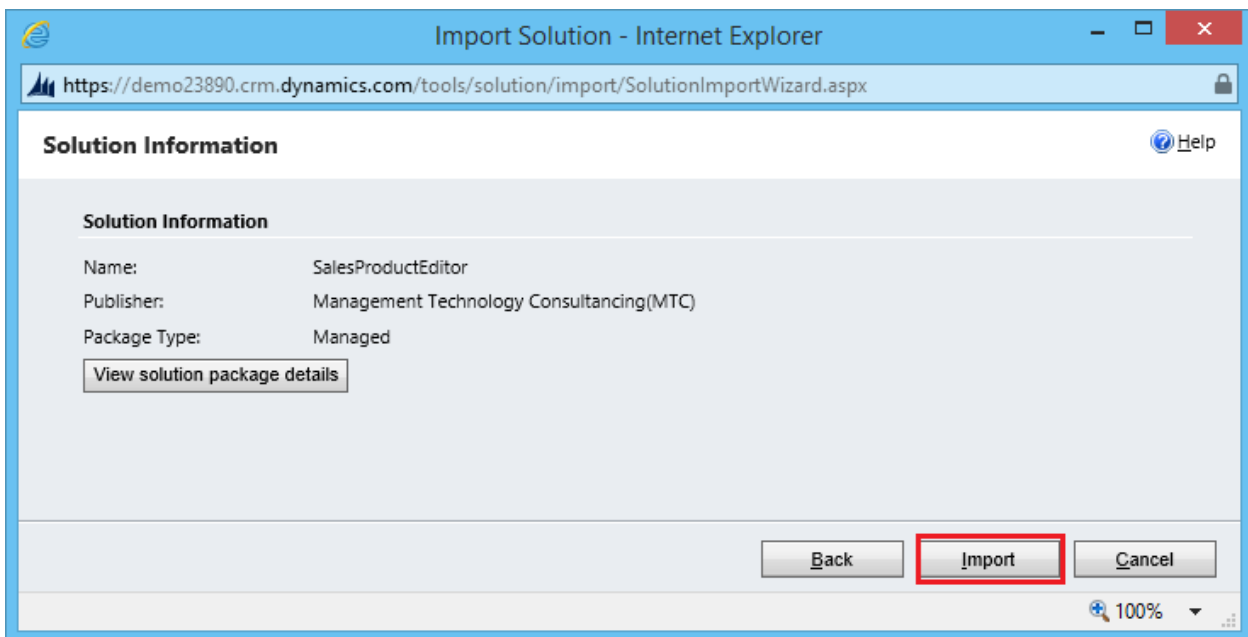


Figure 7: Solution Information

- Click on **Import** it will open importing solution window in that dialog will be opened displaying the message importing the customization please wait for the operation to complete.

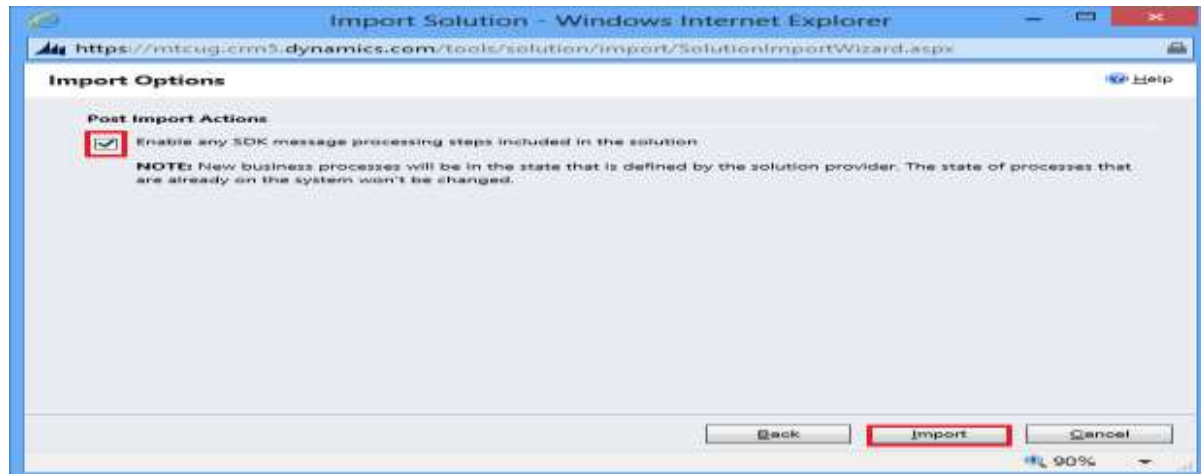


Figure 8: Import Option

- Click on Import, It will open importing solution window in that dialog will be opened displaying the message importing the customization please wait for the operation to complete.

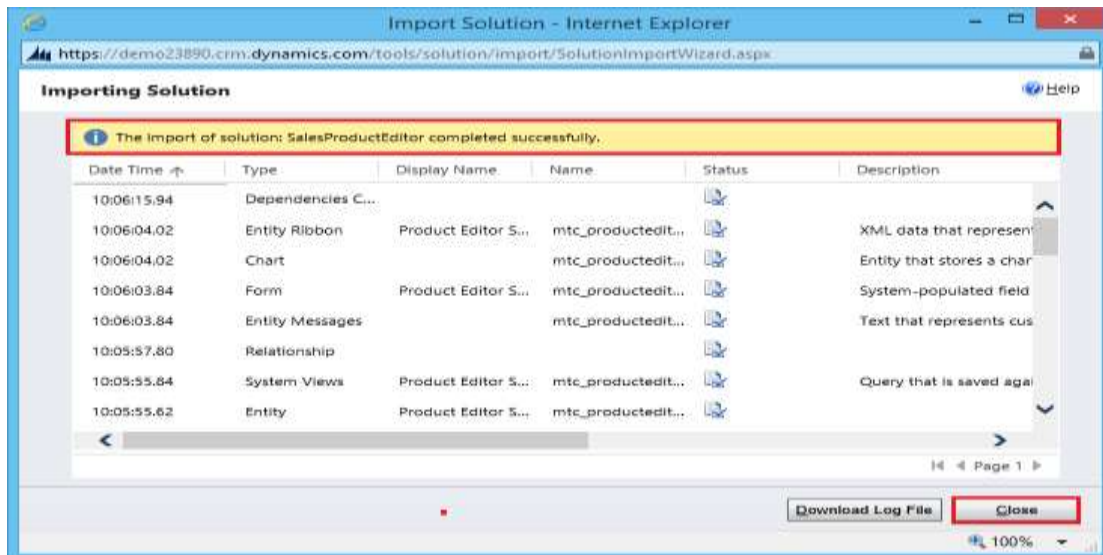


Figure 9: Import Solution Successfully

- Click on Close and refresh the CRM
- After importing the Sales Product Editor Solution you need to place the License key navigate to **settings→solution→Click on Sales Product Editor Solution**



Figure 10: CRM showing both the Solutions

How to get License Key

- To install Sales Product Editor for Microsoft Dynamics CRM you will require License Key, which you can get by sending an E-mail request to salesteam@mtccrm.com with your Organization Unique Name.
- To access your Organization Unique Name Click on **Settings**→**Customizations**→**Developer resources** as shown



Figure 11: Developer Resources

- A window will pop up with Organization Unique Name as shown

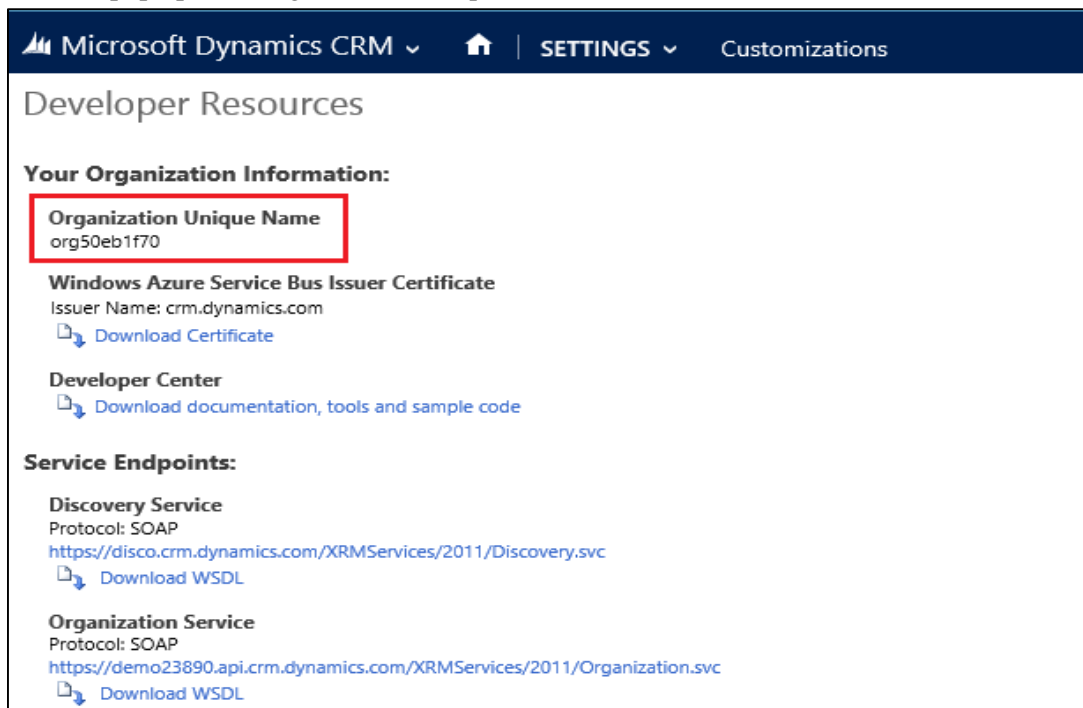


Figure 12: Organization Unique Name

- Send this Organization Unique Name through Email to salesteam@mtccrm.com and you will receive your Licensing Key within 24 hours.

NOTE: After placing the request, you will receive the LICENSE KEY within 24

Placing License Key

- To place license key go to **Settings→Solution→Double Click on Licensing** , as shown



Figure 13: Solution Information

- Click on Licensing, Select a Product as Product Editor, and the Organization Name is automatically displayed taking information from the CRM 2015

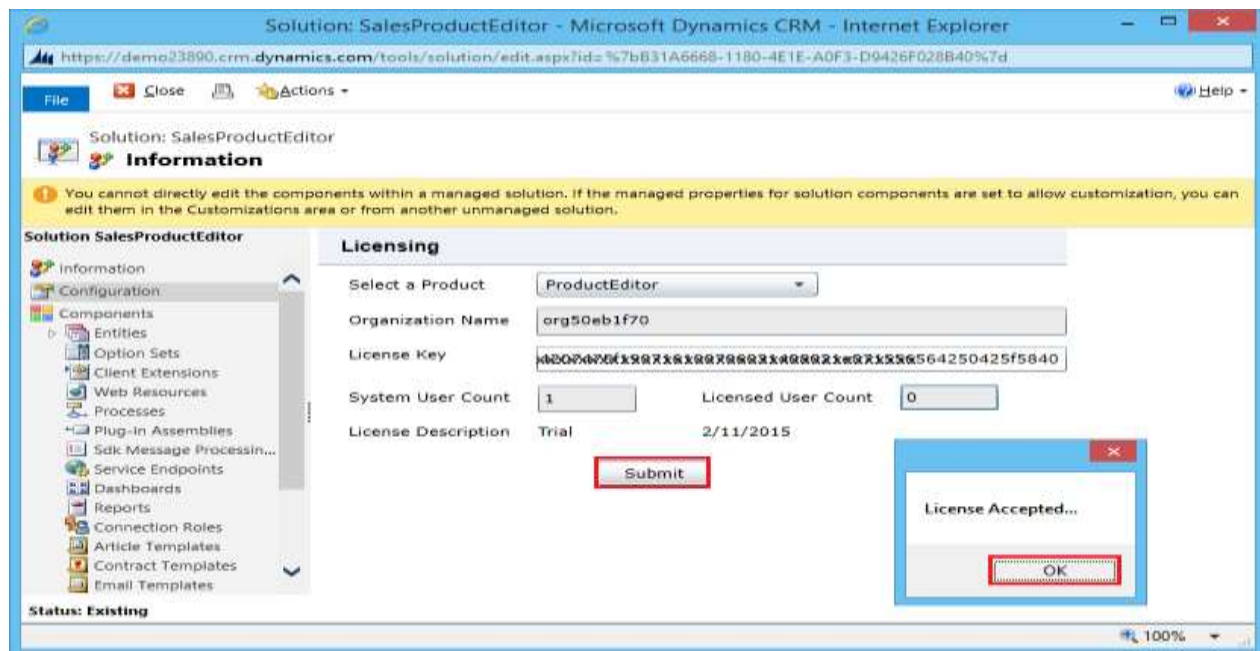


Figure 14: Placing the License Key to Report to PDF

- Copy & Paste the License key which you have received against License Key column
- Click on **Submit** A pop up window appears and displays the message as **License Accepted**. Click on **OK**.

Security Role Privileges

Security Roles are a standard function of Microsoft Dynamics CRM and Product Editor is compliant to the privileges controlled by Security Roles. Your User's access privileges to add or "Create" records and modify or "Write" records from Product Editor which can be controlled by the Security Role functionality explained briefly here and in CRM guides and "Help".

A security role defines how various types of records can be accessed by one category of users, such as all salespeople. To control access to data, you can modify existing security roles, create new security roles, or change security roles which are assigned to each user. Each user can have multiple security roles.

You can set your own guidelines for Security Roles privileges, Navigate to **Settings** → **Security** → **Users** as shown below

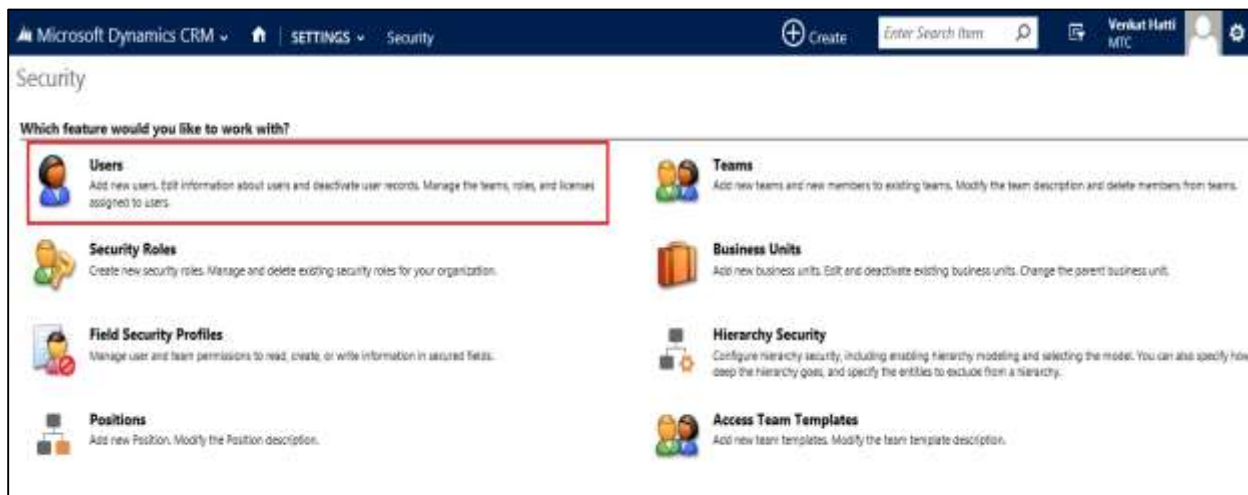


Figure 15 : Navigation for Security Roles

- 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, which opens a new window, click on **Manage Roles** in the ribbon as shown



Figure 16 : Manage Roles window

- A new window will open as shown.
- Select the role as “**MTC License**” and click on “**OK**” to assign the role to the user.

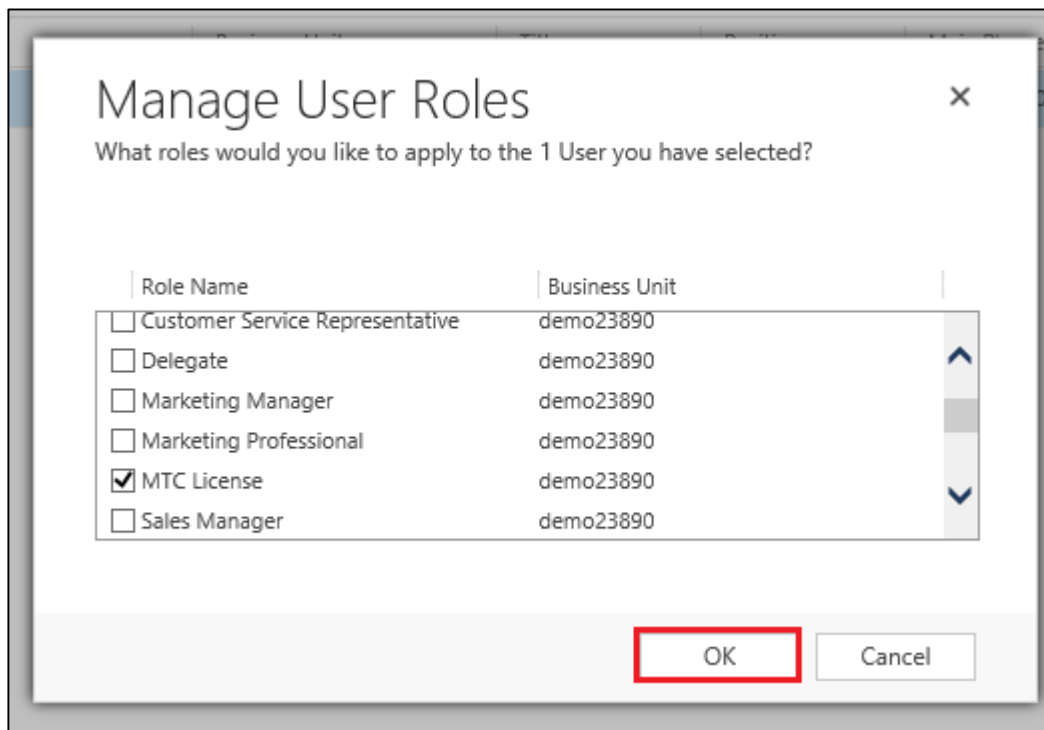


Figure 17 : Manage User Roles

Sales Product Editor Functionality

This function provides an easy method for you to edit the columns specific to the sales product editor. This section deals with how to add product Editor in Quote.

- Navigate to **Settings** → **Solution** → click on **Product Editor** as shown below

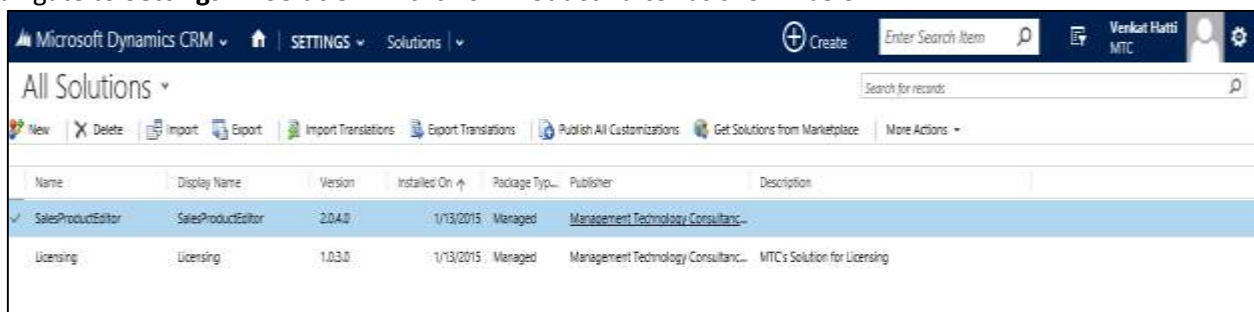


Figure 18 : Solution Window

- Solution information window opens click on the Configuration to display the Sales Product Editor Settings.

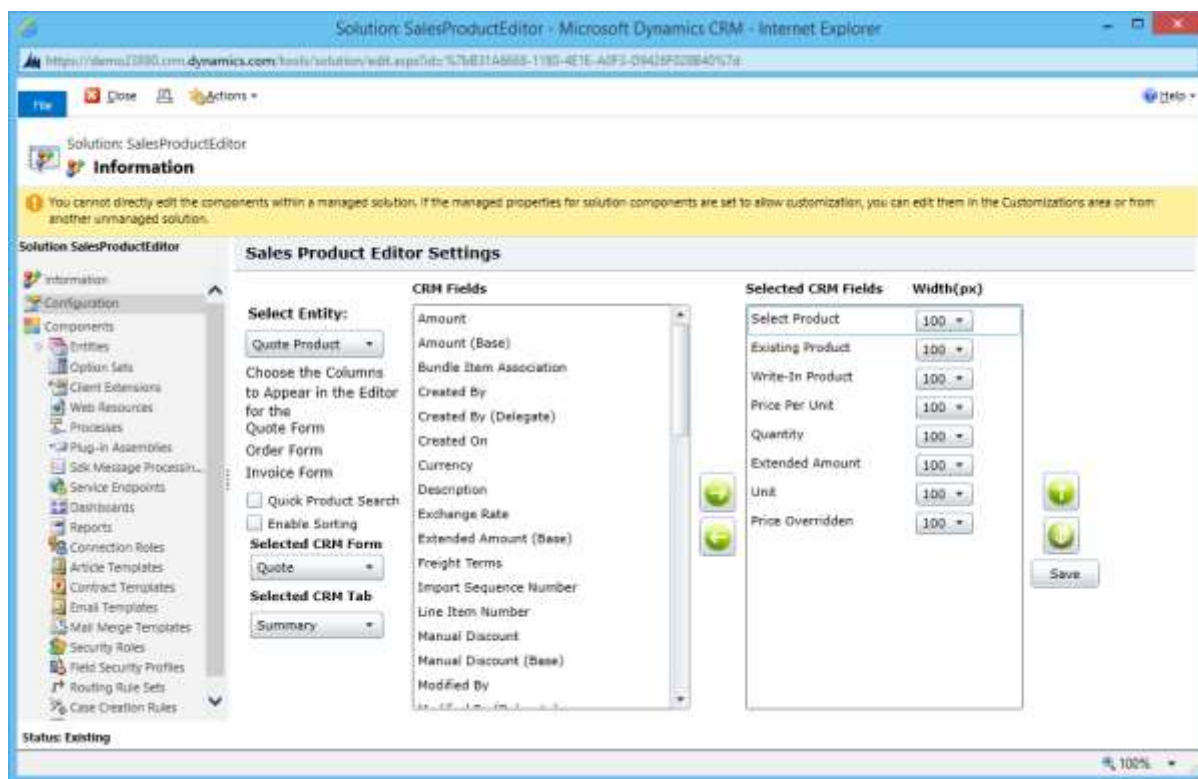
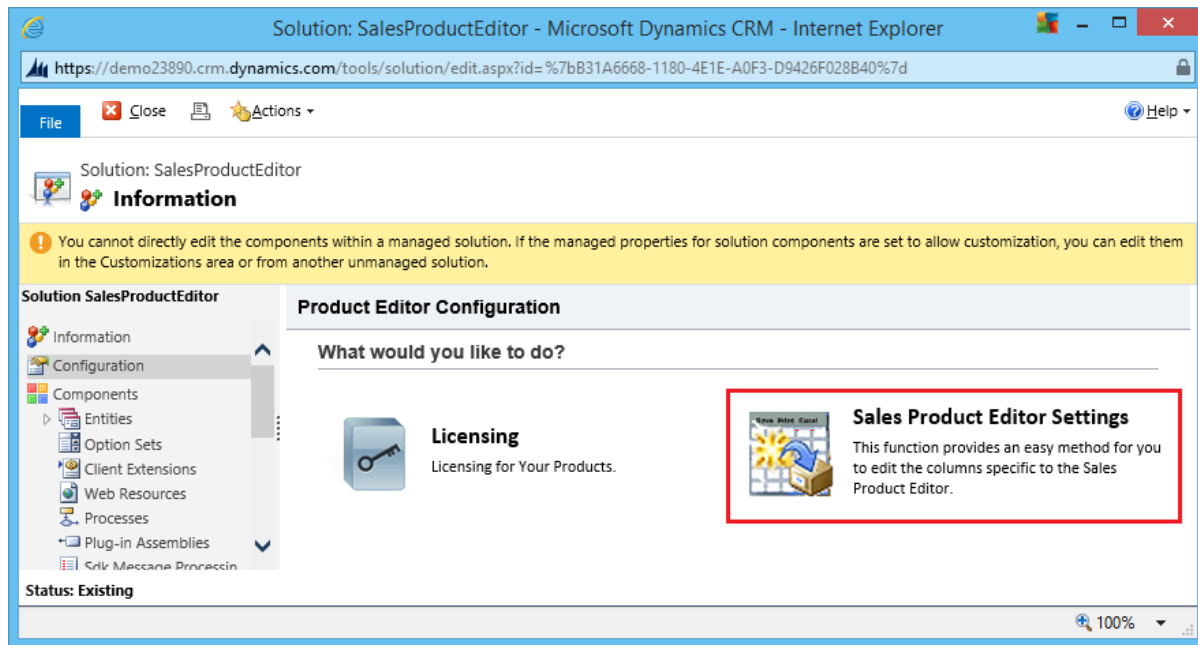


Figure 19 : Sales Product Editor Settings

- Select an entity from the option set, for example select quote product.

Sales Product Editor Settings

Select Entity:
 Quote Product (selected)
 Order Product
 Invoice Product
 Opportunity Product

CRM Fields

- Amount
- Amount (Base)
- Bundle Item Association
- Created By
- Created By (Delegate)
- Created On
- Currency
- Description
- Exchange Rate
- Extended Amount (Base)
- Freight Terms
- Import Sequence Number
- Line Item Number
- Manual Discount
- Manual Discount (Base)
- Modified By

Selected CRM Fields

- Select Product
- Existing Product
- Write-In Product
- Price Per Unit
- Quantity
- Extended Amount
- Unit
- Price Overridden

Width(px)

- 100
- 100
- 100
- 100
- 100
- 100
- 100
- 100

Invoice Form

☐ Quick Product Search

☐ Enable Sorting

Selected CRM Form
Quote

Selected CRM Tab
Summary

Navigation: Forward Arrow, Back Arrow, Up Arrow, Down Arrow, Save

Figure 20 : Selecting an Entity

Quote Product

Select an entity from drop down **Quote Product**, **Order Product**, **Invoice Product** and **Opportunity Product** then select different attributes for customizing your view.

- To add the fields into the Quote product editor grid select the fields in CRM Fields that you want to and Click on forward arrow as shown

Sales Product Editor Settings

Select Entity:
Quote Product

CRM Fields

- Amount (selected)
- Amount (Base)
- Bundle Item Association
- Created By
- Created By (Delegate)
- Created On
- Currency
- Description
- Exchange Rate
- Extended Amount (Base)
- Freight Terms
- Import Sequence Number
- Line Item Number
- Manual Discount
- Manual Discount (Base)
- Modified By

Selected CRM Fields

- Select Product
- Existing Product
- Write-In Product
- Price Per Unit
- Quantity
- Extended Amount
- Unit
- Price Overridden

Width(px)

- 100
- 100
- 100
- 100
- 100
- 100
- 100
- 100

Invoice Form

☐ Quick Product Search

☐ Enable Sorting

Selected CRM Form
Quote

Selected CRM Tab
Summary

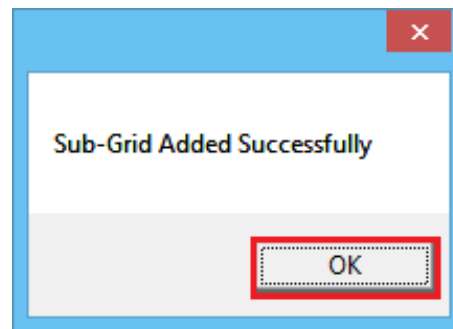
Navigation: Forward Arrow (highlighted), Back Arrow, Up Arrow, Down Arrow, Save

Figure 21 : Selection of CRM Fields

- The selected CRM fields will be added to the product editor grid fields and then click on " Save"
- You can drag the fields from selected CRM fields to CRM Fields by using backward arrow.
- You can move up or move down by using the UP and down arrows.

Figure 22 : Navigating CRM Fields to Selected CRM Fields

- After saving, it shows the message as Sub-Grid added successfully.



- Click on “ **Publish All Customizations**”
- Quote Product Editor is accessed from the left navigation pane of Microsoft Dynamics CRM, Click on **Sales** → **Quote** Quotes View will open as shown

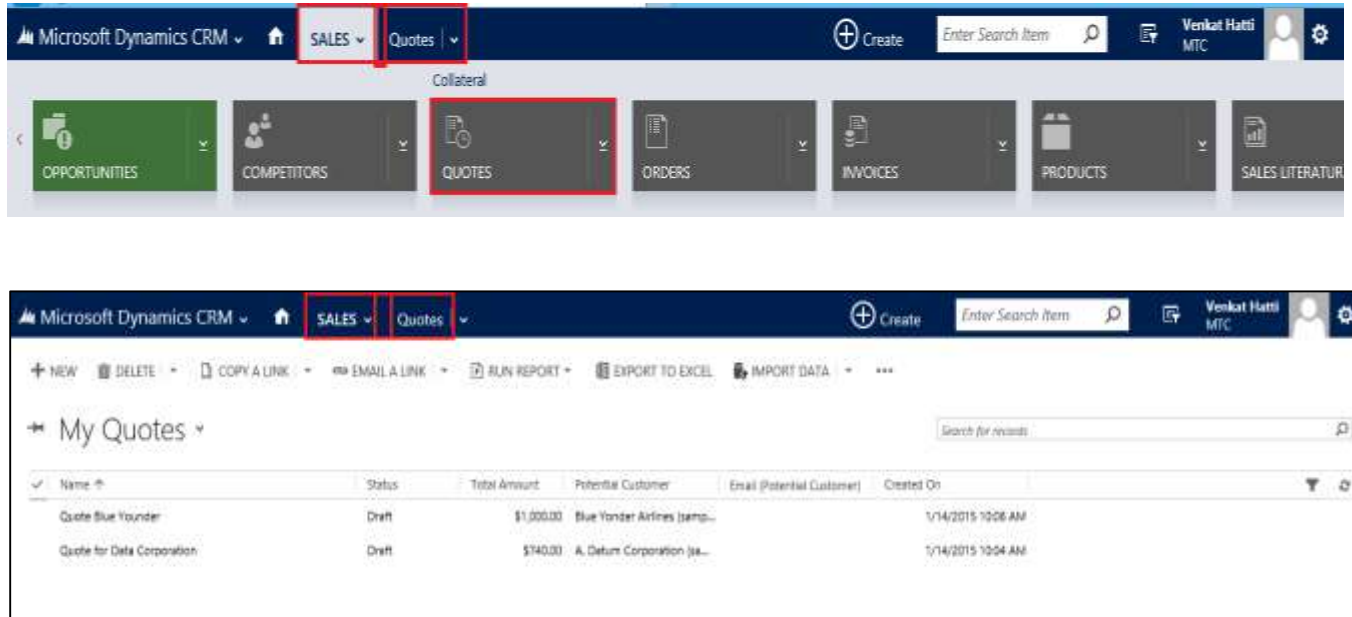


Figure 23 : Quote

- Click on a Quote as per your requirement quote page will open with Quote Product Editor tab as shown

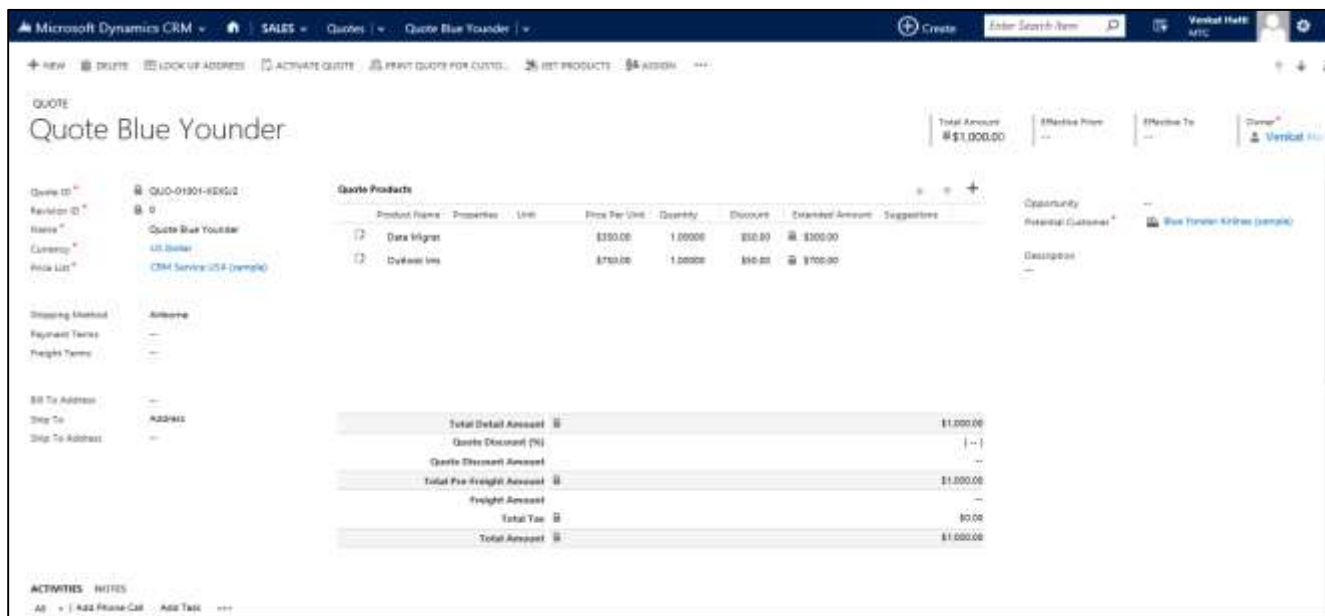


Figure 24 : Quote Product Editor

- Click on the Product Editor tab to add, edit and delete the records

Adding a new Record

- You can easily add New Records at the top of excel like grid, as shown in Figure. You can add continuous records at top saving you a lot of time.
- Click on **+ Add New Row** to add a new Record.
- Select Product tab has two options(Existing Product and Write-In Product)
- If you have selected the Existing Product in Existing Product tab click on Look up Icon to select the existing products.
- If you have selected Product as Write-in Product fill the Product name in Write-in tab.
- Give general information as Price per unit, Quantity, extended amount etc....
- It allows you to enter various details of client related to Quotes such as contact details, e-mail id etc. Excel as grid allows you to view all details of your customer in one single row and save it.

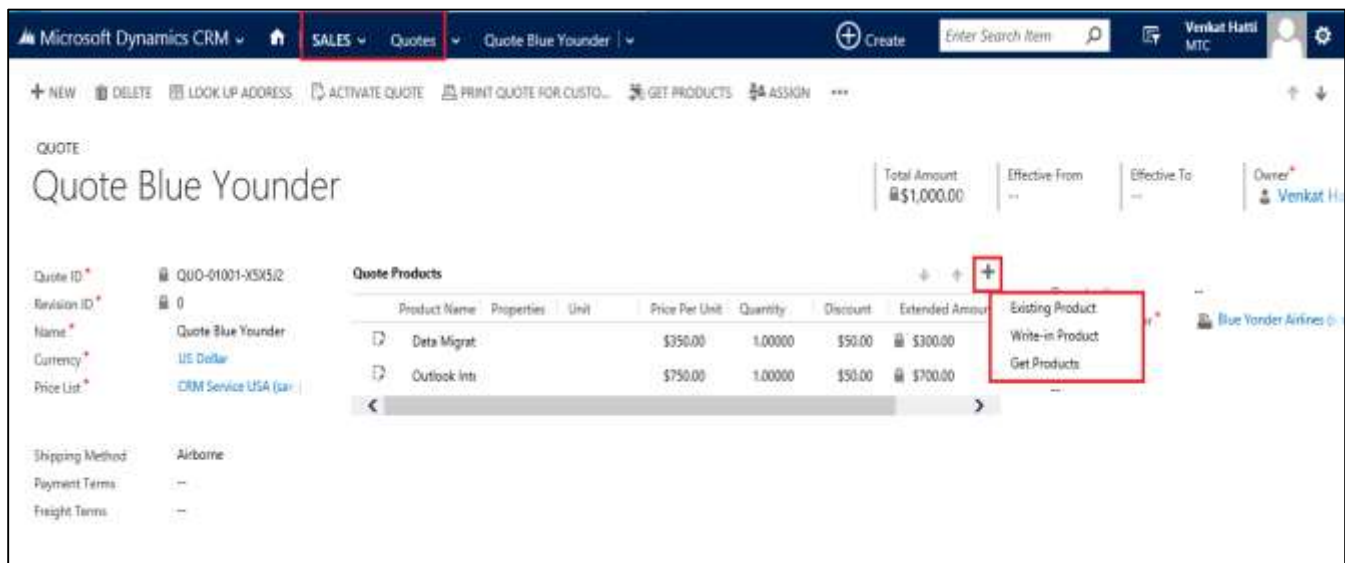



Figure 25 : Adding a New Record

Editing a Record

- To edit a record click on the record which you want to edit as shown
- You can edit the quantity by clicking on the arrow button you can also edit price per units, amount etc. as per your requirement.
- You can save the record by pressing the  save button related to record. This will save the single record.

Microsoft Dynamics CRM - SALES - Quotes - Quote Blue Younder

Quote ID: QUD-01001-35352
Revision ID: 0
Name: Quote Blue Younder
Currency: US Dollar
Price List: CRM Service USA (an...)

Shipping Method: Airborne
Payment Terms: --
Freight Terms: --

Bill To Address: --
Ship To: Address
Ship To Address: --

Quote Products

Product Name	Properties	Unit	Price Per Unit	Quantity	Discount	Extended Amount	
Data Mgmt			\$150.00	1.00000	\$50.00	\$650.00	Delete
Outlook Int			\$750.00	1.00000	\$50.00	\$700.00	

Total Detail Amount: \$1,350.00
Quote Discount (%): --
Quote Discount Amount: --
Total Pre-Freight Amount: \$1,350.00
Freight Amount: --

Opportunity: Potential Customer
Owner: Venkat Hatti MTC

Draft

Figure 26 : Editing a Record

Deleting a Record

- To delete records, select the record by clicking on **Delete** button, as shown.

Microsoft Dynamics CRM - SALES - Quotes - Quote Blue Younder

Quote ID: QUD-01001-35352
Revision ID: 0
Name: Quote Blue Younder
Currency: US Dollar
Price List: CRM Service USA (an...)

Shipping Method: Airborne
Payment Terms: --
Freight Terms: --

Bill To Address: --
Ship To: Address
Ship To Address: --

Quote Products

Product Name	Properties	Unit	Price Per Unit	Quantity	Discount	Extended Amount	
Data Mgmt			\$150.00	2.00000	\$50.00	\$650.00	Delete
Outlook Int			\$750.00	1.00000	\$50.00	\$700.00	

Total Detail Amount: \$1,350.00
Quote Discount (%): --
Quote Discount Amount: --
Total Pre-Freight Amount: \$1,350.00
Freight Amount: --

Opportunity: Potential Customer
Owner: Venkat Hatti MTC

Draft

Figure 27 : Deleting a Record

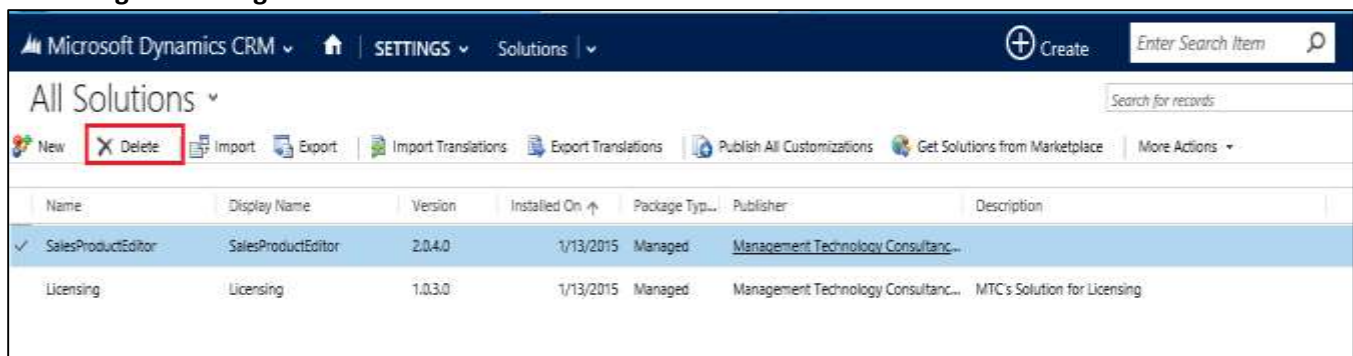
Note: In this User Guide, we are using screen shots for Quote, Order, Invoice, Opportunity works in a similar way.

Uninstallation of Sales Product Editor

To delete the Sales Product Editor Solution you need to delete all the component types i.e. Entities, Forms, web Resources etc., which you have added while working with Add and Edit grid settings. To uninstall the Sales Product Editor follow the below steps

To delete the Product editor from the entity go to the entity where you have added the product editor, for example if you have added the product editor in the Quote **go to sales → Quote → Select an existing Quote** it will navigate to a Quote page

- The Quote Product Editor will be deleted.
- Follow the same process to delete all Product Editors in Opportunity, Order and invoice.
- Now **go to settings → Solutions → Product Editor → Click on Delete.**



- Uninstall solution web page dialog will open. Click on **OK**. The solution will be uninstalled.

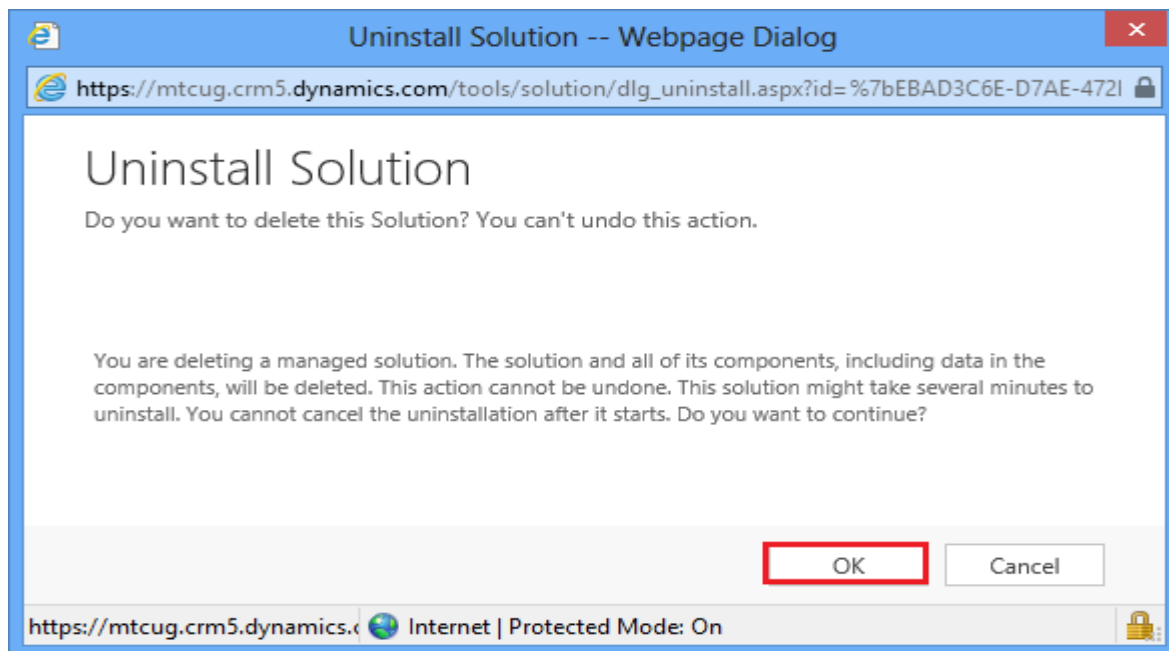


Figure 28 : Uninstallation solution

- Similarly, after deleting Sales Product editor Solution, follow the same procedure for Licensing Solution also.

MTC Overview

MTC develops an ever growing and extensive family of add-on products, complete solutions, and core development technologies for the Microsoft Dynamics CRM platform. MTC supports a product development effort with a highly efficient global Microsoft CRM exclusive services business 24/7. MTC's products represent the refinements in functionality, deliverability, and long-term maintainability of unique highly customized Microsoft Dynamics CRM platform business solutions suggested as most important in MTC's global volume customization business. MTC runs its internal operations and many of its partners and affiliates with this example



Small and medium sized businesses (SMB) can now affordably build the kind of enterprise automation system that distinguishes the best unique-line-of-business enterprises on earth. MTC uniquely delivers a very-unique service of clear value to businesses globally seeking automation as a business advantage.

SMB Custom Enterprise is your business's exact fit for a complete low cost business-specific companywide automation solution - marketing to operations to accounting in a closed loop - built on the Microsoft Dynamics CRM platform technologies. Starting with the Microsoft CRM platform in either a monthly Online or wholly owned on premise implementation you choose from a large and growing set of packaged option functionality where you determine what non-standard additional functions you want on this solution, then add them.

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Dynamics Exchange is the leading community free and open to Microsoft CRM uses and professionals for support, training, knowledge, products, and services worldwide.

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3. MTC shall provide End-User with one (1) machine-readable copy of the Product.
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5. The Product is intended for use solely by End-User for their own internal purposes. The Product may only be used on the CRM Organizational Unit licensed and paid for by End-User to the MTC. End-User agrees not to copy, modify, sub-license, assign, transfer or resell the Product, in whole or in part. End-User agrees not to translate, reverse engineer, decompile, disassemble, or make any attempt to discover the source code of the Product (except and only to the extent applicable law prohibits such restrictions). End-User further agrees not to download/upload the Product, in whole or in part, or to establish a network, place data on the Internet, or offer a service bureau utilizing the Product. End-User agrees to restrict access to the Product to designated employees and to use its best efforts to prevent violation of these restrictions by agents, employees and others, taking such steps and reasonable security precautions as may be necessary. End-User shall permit MTC and/or its representative access to its premises during normal business hours to verify compliance with the provisions of this Agreement.
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14. This Agreement is the complete and exclusive statement of the understanding between the parties, with respect to the subject matter, superseding all prior agreements, representations, statements and proposals, oral or written.
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MTC is always open to global community of Microsoft Dynamics CRM platform Software Users



Availability and hours of operation: Monday to Friday

USA PST 323-851-5008 - 8:00 AM to 6:00 PM

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USA Headquarters:

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7738 Sky hill Drive, Los Angeles, CA 90068

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