



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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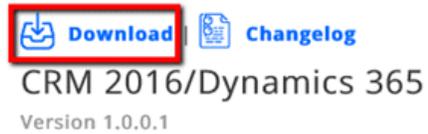
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Solution Import

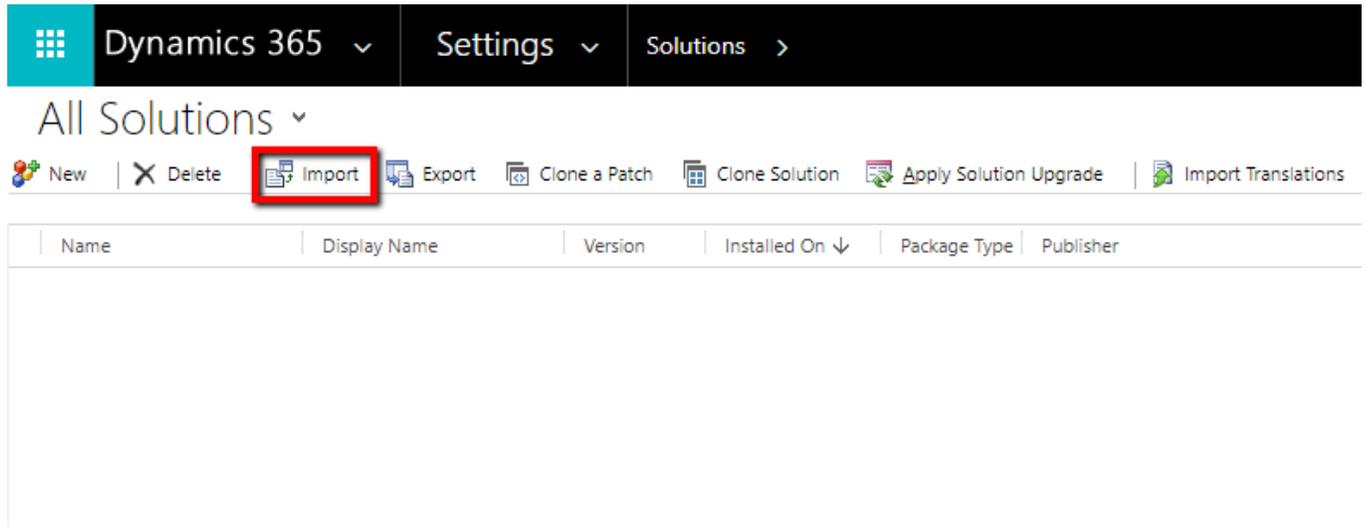
Please follow the below steps in order to start the import process:

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

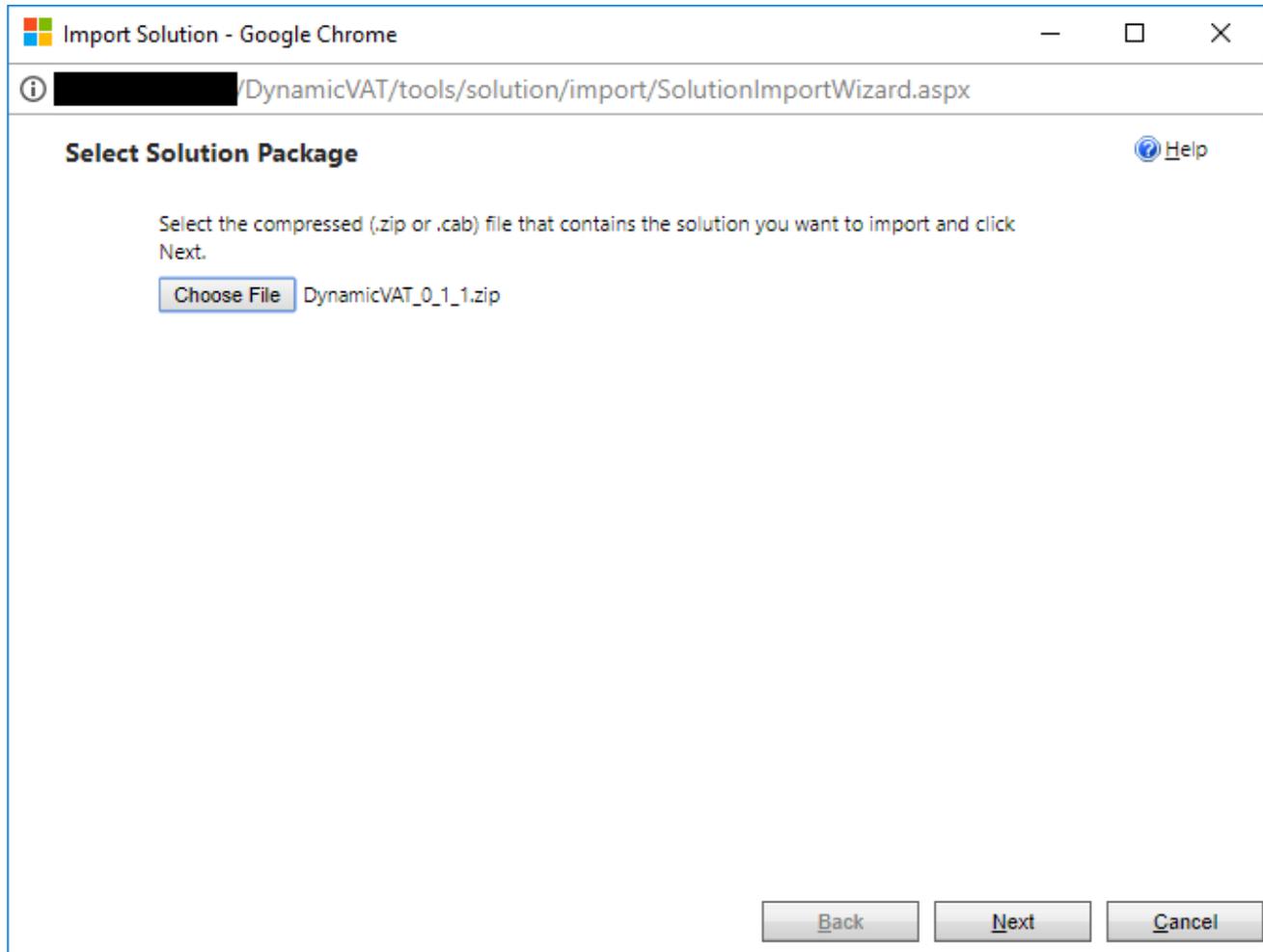
Download Dynamic VAT



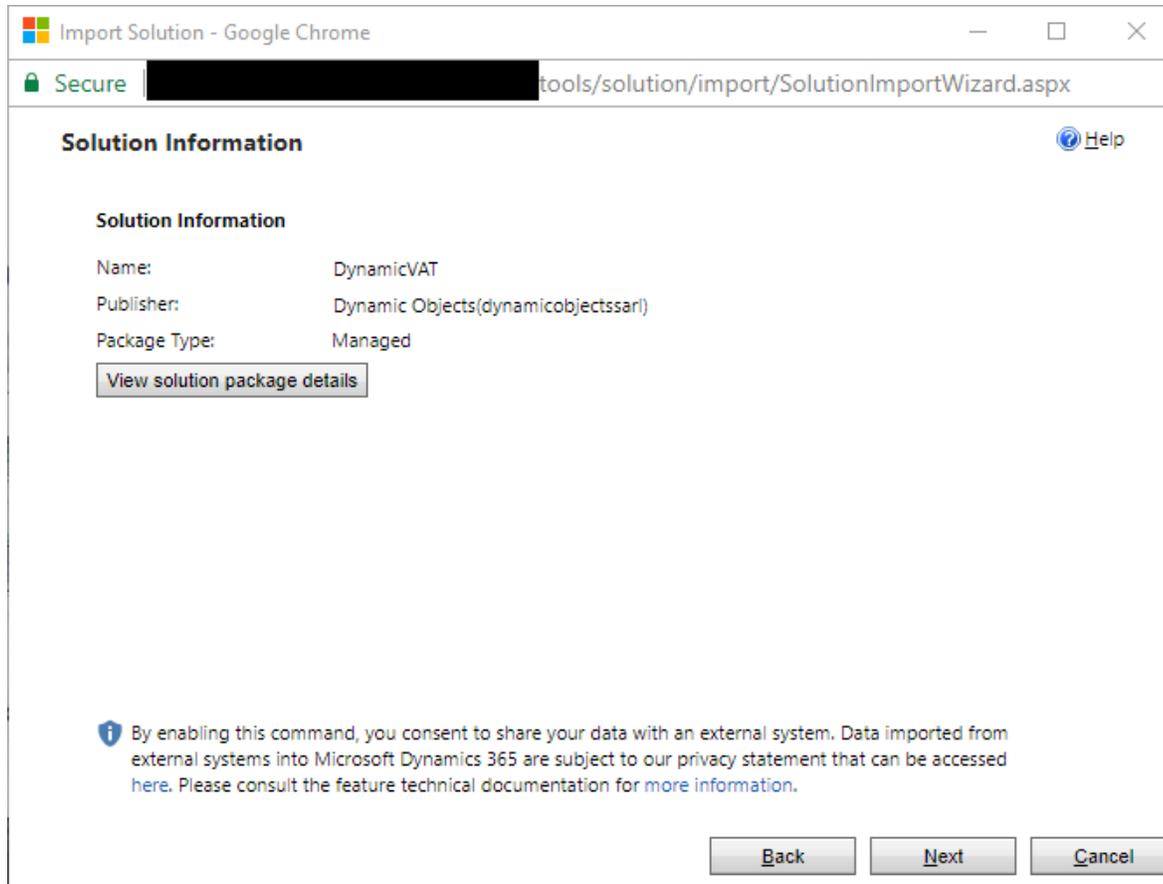
2. Login to your Microsoft Dynamics CRM/365 organization and head to **Settings** -> **Solutions** and click on the **Import** button.



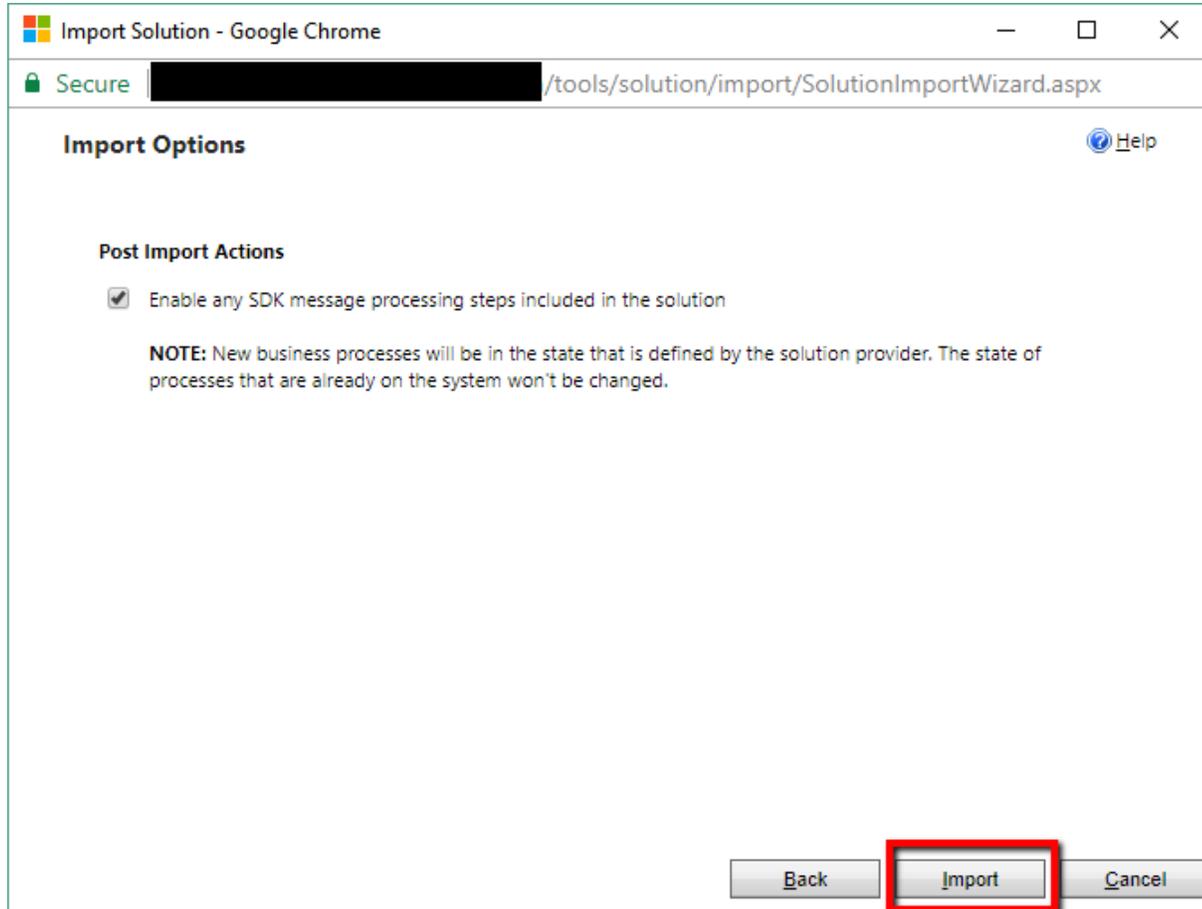
3. Select the solution file that you downloaded in Step 1 and Press **Next**.



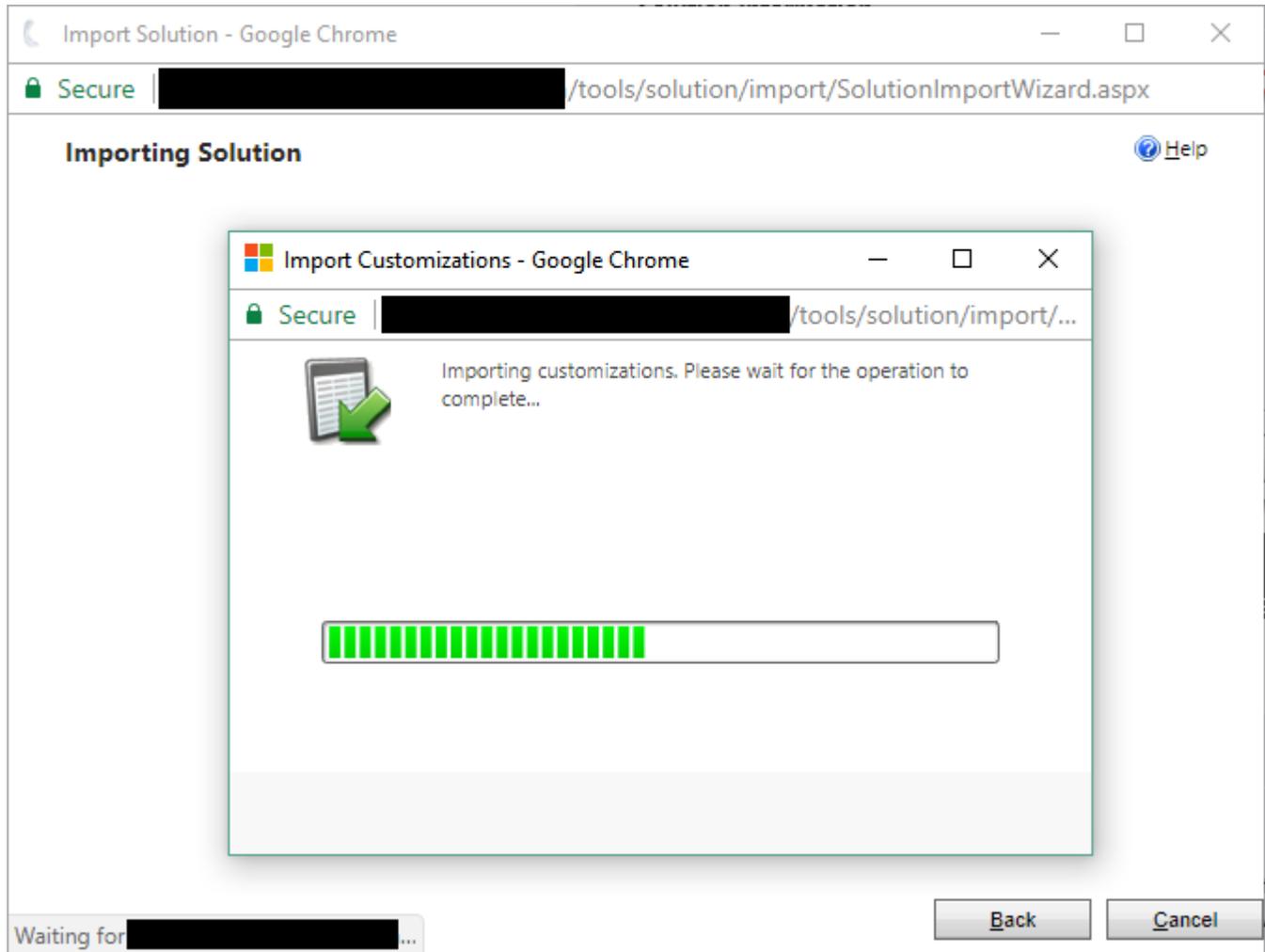
4. Verify that you imported the correct Solution by checking the solution information and package details and press **Next**.



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



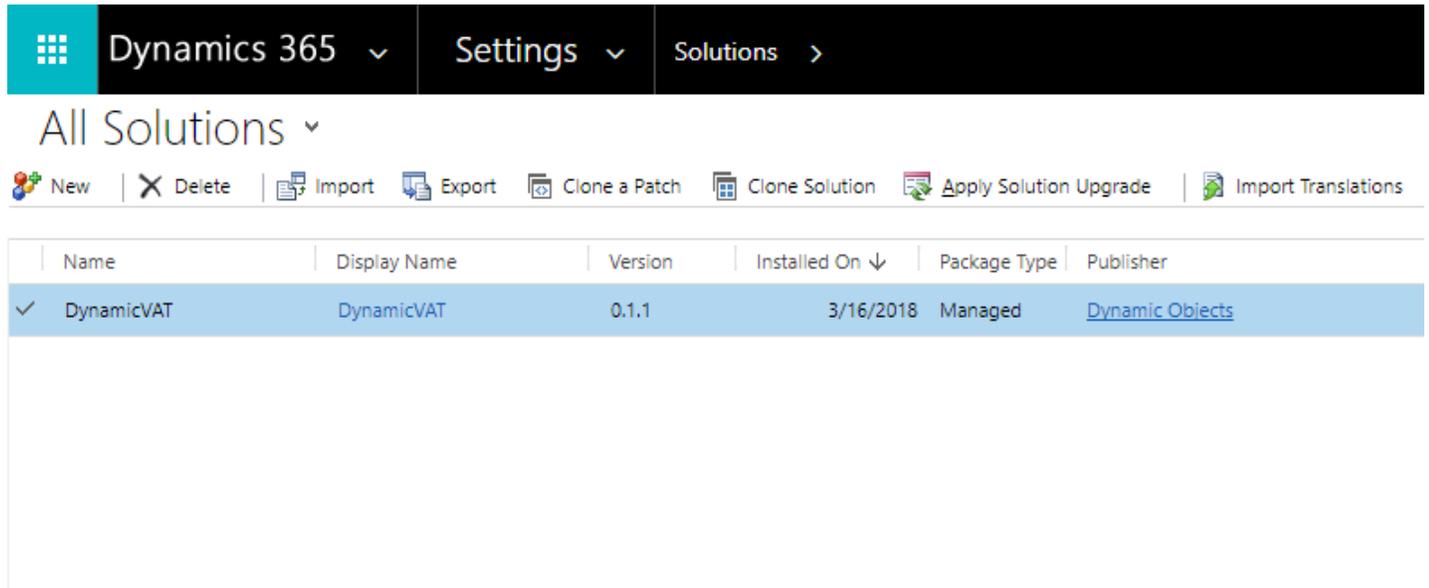
6. The Solution import process will start. Please wait around 5 minutes for the solution import process to complete.



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

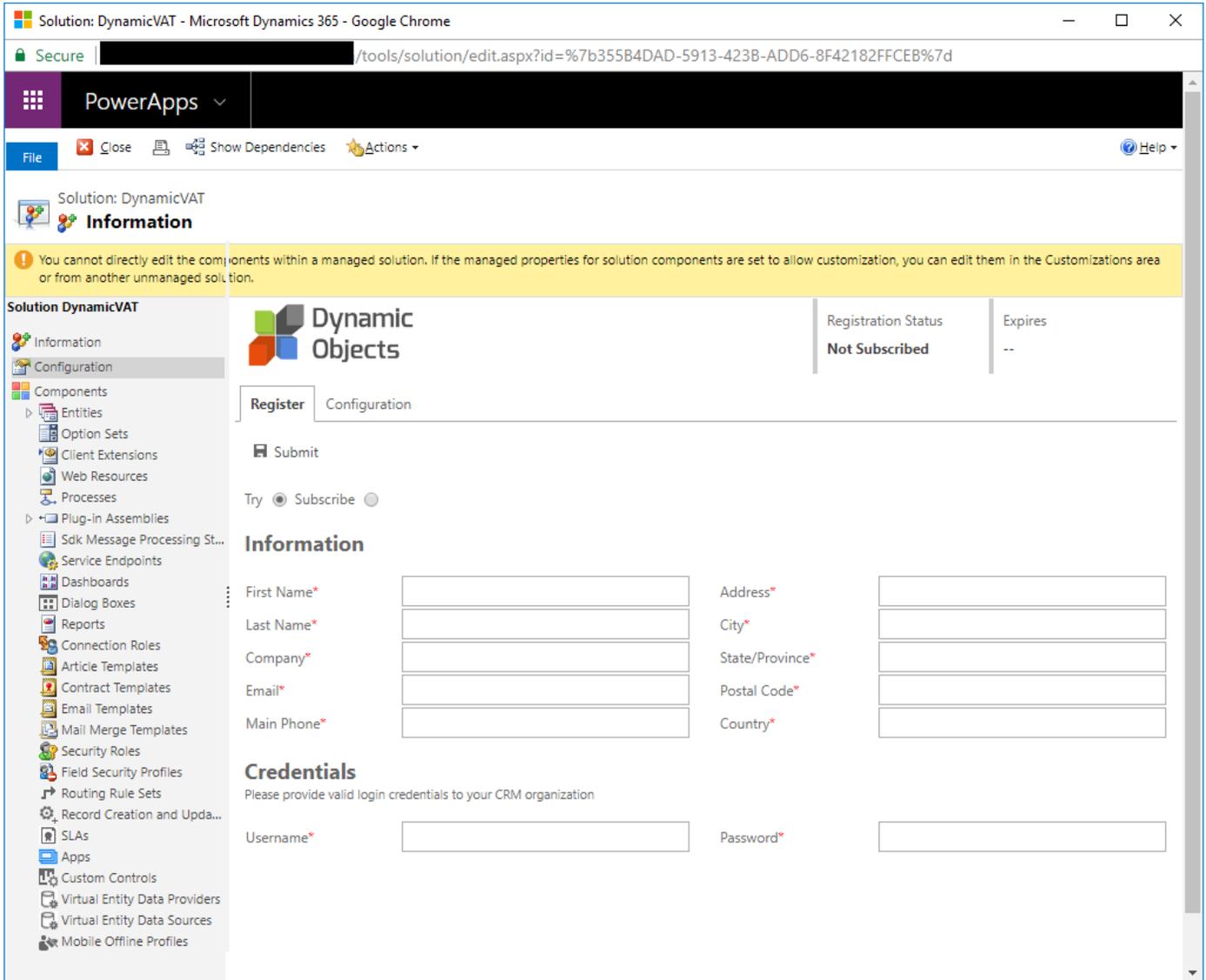
When the import process is complete, please double click on the solution imported to start the registration process.



The screenshot shows the Dynamics 365 interface. At the top, there is a navigation bar with 'Dynamics 365', 'Settings', and 'Solutions'. Below this is a header for '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 columns: Name, Display Name, Version, Installed On, Package Type, and Publisher. The table contains one row for 'DynamicVAT'.

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.



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

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 - Custom Controls
 - Virtual Entity Data Providers
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 - Mobile Offline Profiles

Dynamic Objects

Registration Status: **Trial** Expires: **4/20/2018**

Register Configuration

Submit Test CRM Credentials

Try Subscribe

Information

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

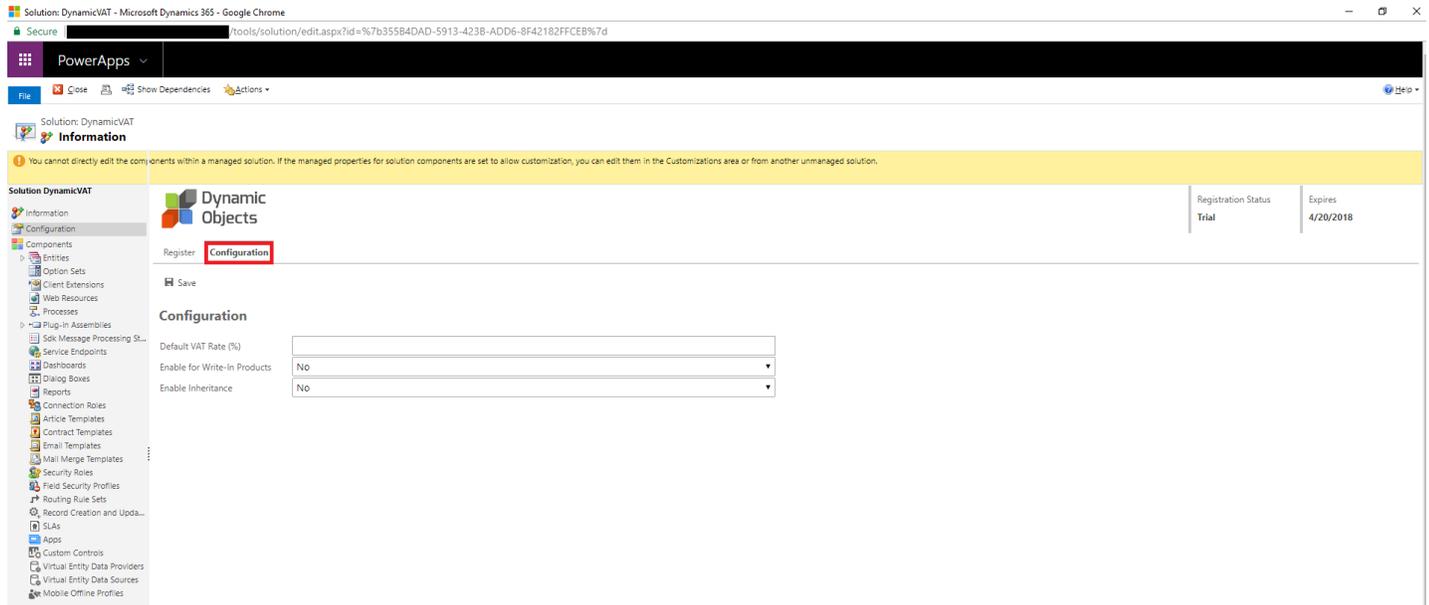
Credentials

Please provide valid login credentials to your CRM organization

Username*	<input type="text" value="john_do@dynamicobjects.net"/>	Password*	<input type="password" value="....."/>
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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 (%)	11
Enable for Write-In Products	Yes
Enable Inheritance	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 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*

Payment Plan

Plan*

Billing Address

[Copy Address Above](#)

Address Line 1* State/Province*

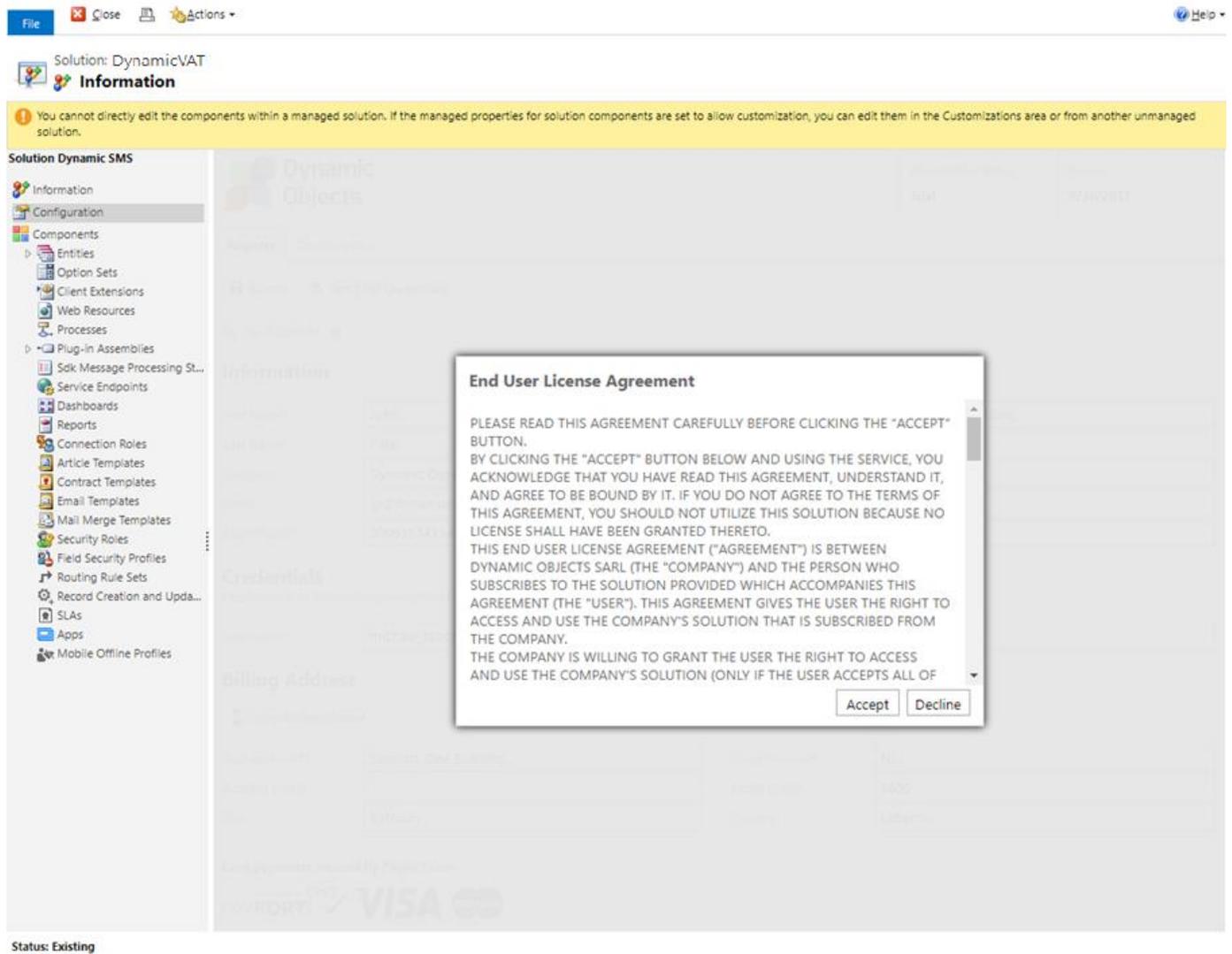
Address Line 2* Postal Code*

City* Country*

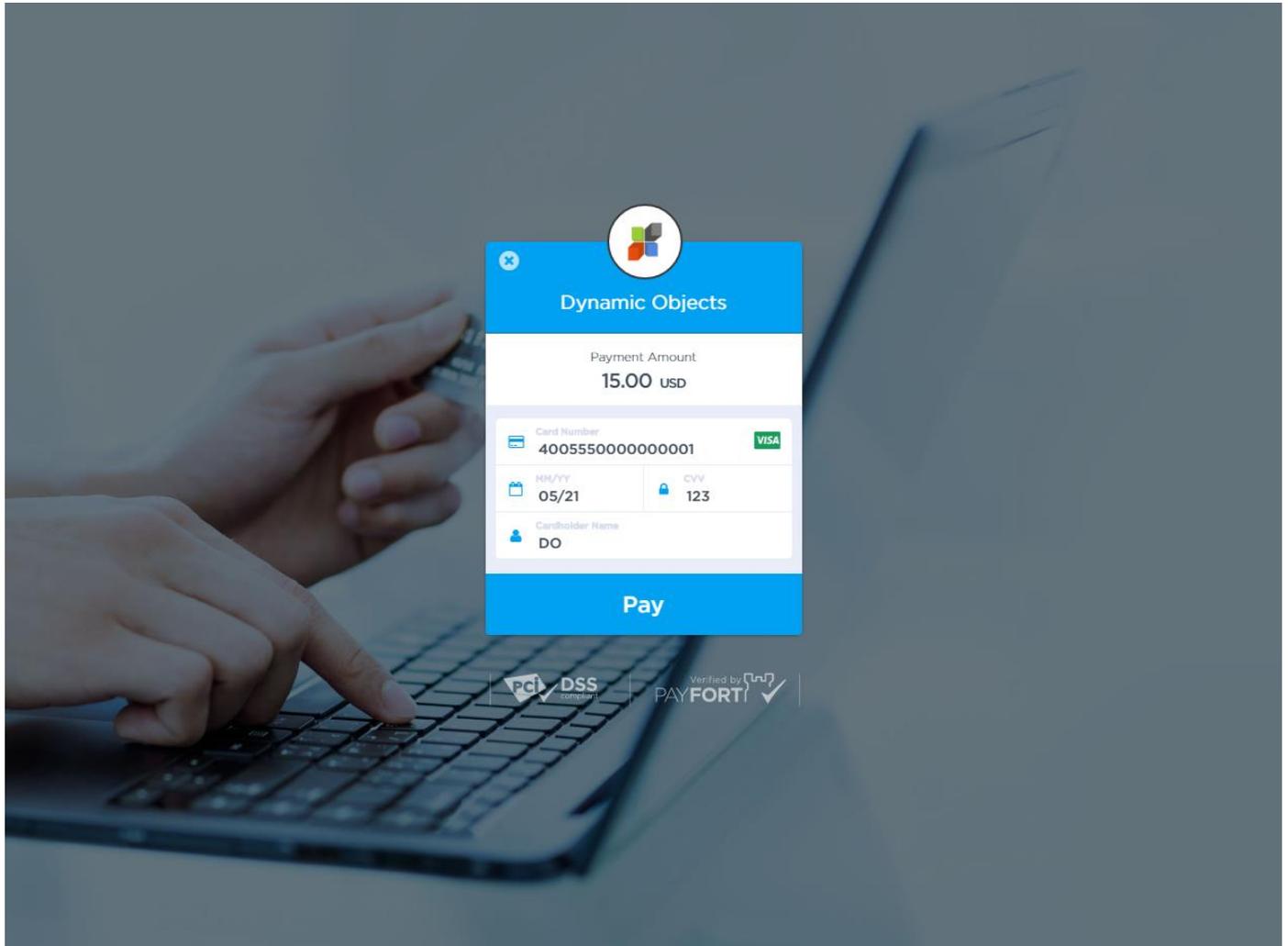
Card payments secured by Payfort.com

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.



- 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.