Microsoft Dynamics CRM / XRM Platform

User Guide

CRM Versions Supported:
CRM 2011/2013/2015/2016

Purchasing Manager for Microsoft Dynamics CRM allows you to create Purchase Orders from CRM Sales Orders, generate and follow purchase orders, manage vendors, and delivery dates. This module eloquently adds Purchasing functionality to Microsoft CRM. Part of MTC's "Enterprise" product offering of CRM to ERP functional enhancement product family

Purchase Manager is intended for implementation by solution professionals.

Coding Version   : 2015.012016.0.1
Document Version : 2015.012016.0.1
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Installation Process

To install Purchase Manager Solution, the following steps are to be followed.

STEP 1:
- Go to http://www.dynamicsexchange.com/pmr.aspx click on Download to get Solution.

STEP 2:
- On Downloading you will get **Purchasing Manager Solution.zip** (ZIP file).

- Extract the files from the downloaded folder. You will get two WINRAR ZIP files.

PurchaseManager_2015.012016.0.1_managed.zip   Licensing_2015.012016.0.1_managed.zip

> NOTE: To install the **Solution** need to be imported into CRM

STEP 3:
- Open your CRM click on **settings→solution→** it will open import Solution window.

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.

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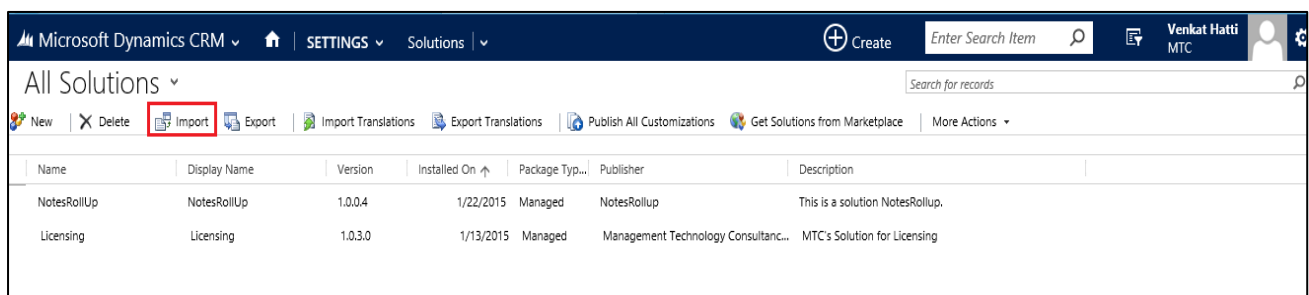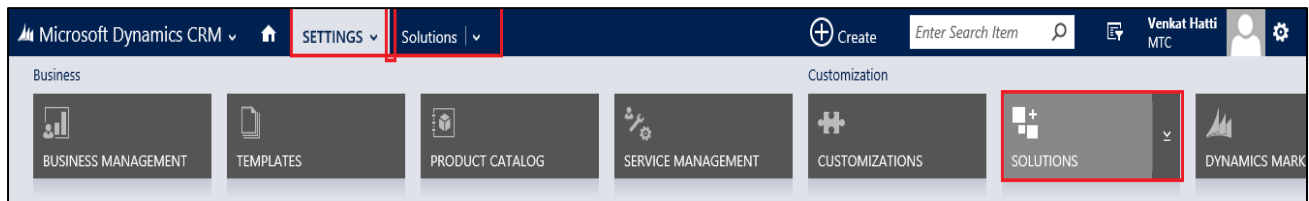
Installing Licensing Solution
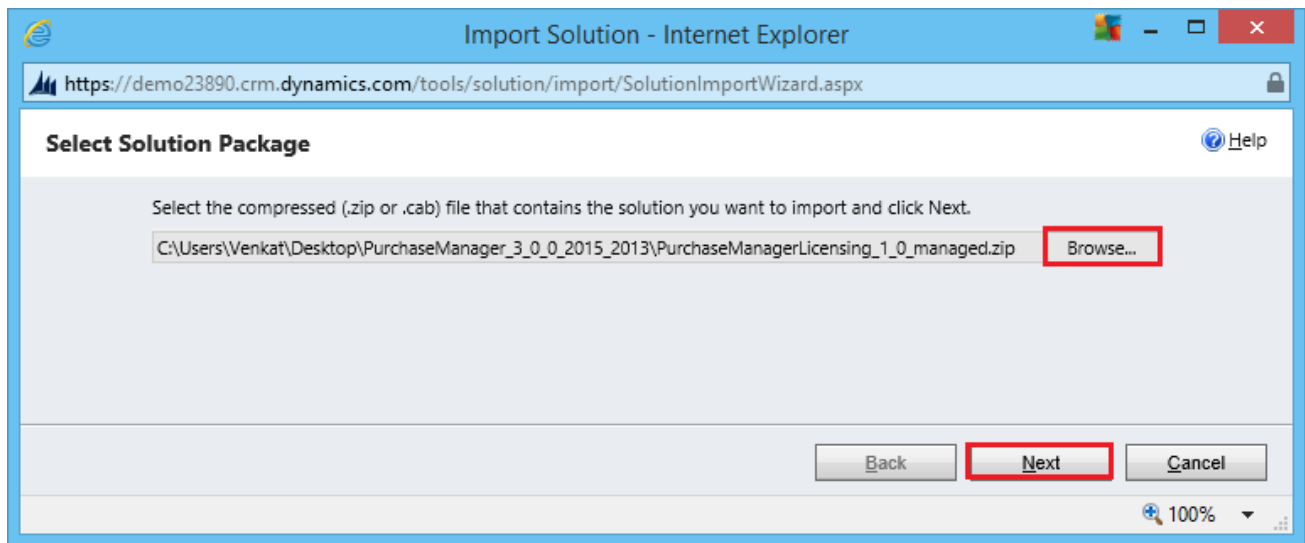
Figure 2 : Select Solution Package

- In Import Solution Window you can browse and Select Solution Package zip file and then click on Next for further processing.
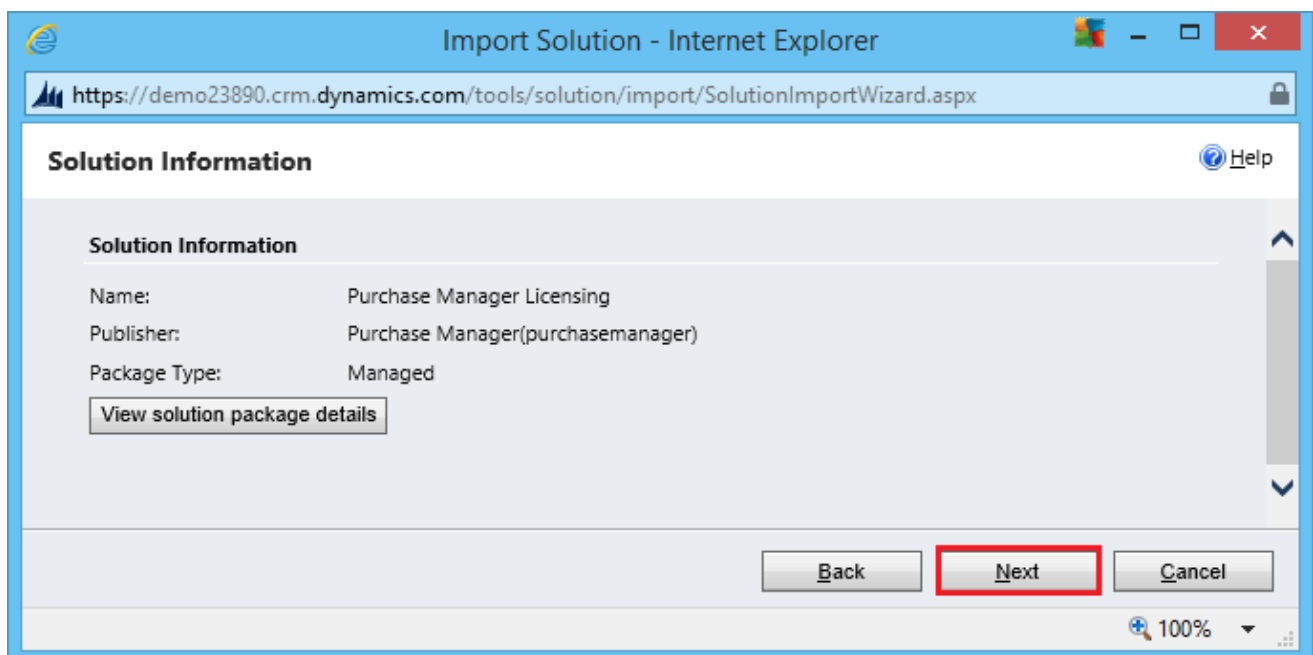
Figure 3: Importing Options window

- Click on Next to proceed

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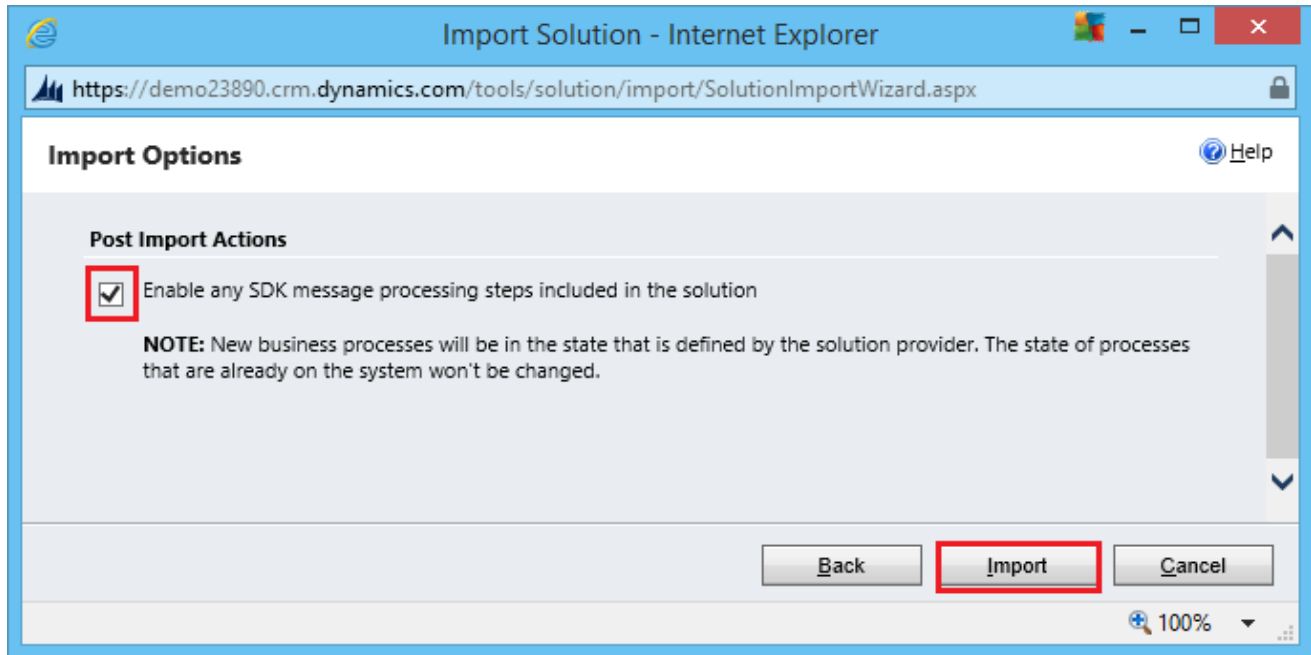
Figure 4: Import Option

- Click on Next to proceed
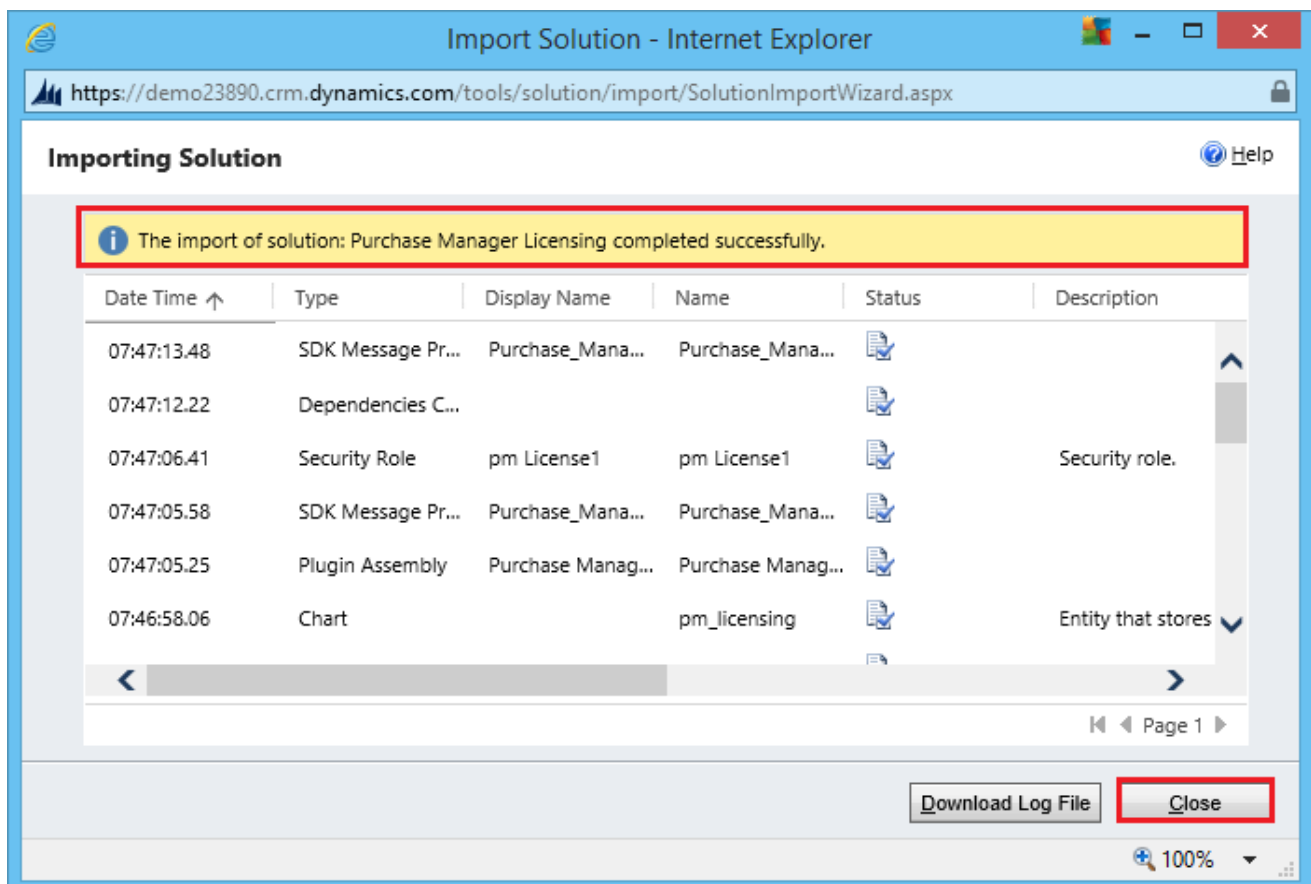
Figure 5: Importing Solution – Licensing

- Click on Close after successful completion message is displayed.

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Installing Actual Solution

- Go to and Select Solution and brow to get or Purchase Manager Solution
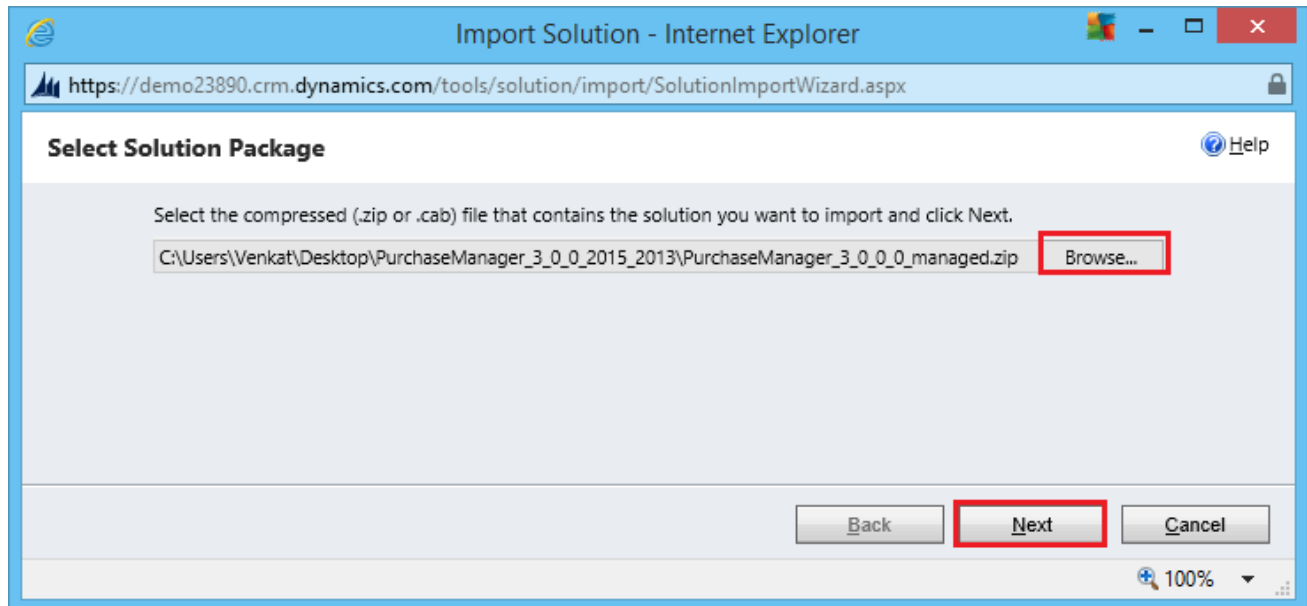
Figure 6 : Select Solution Package

- Click on next to Continue
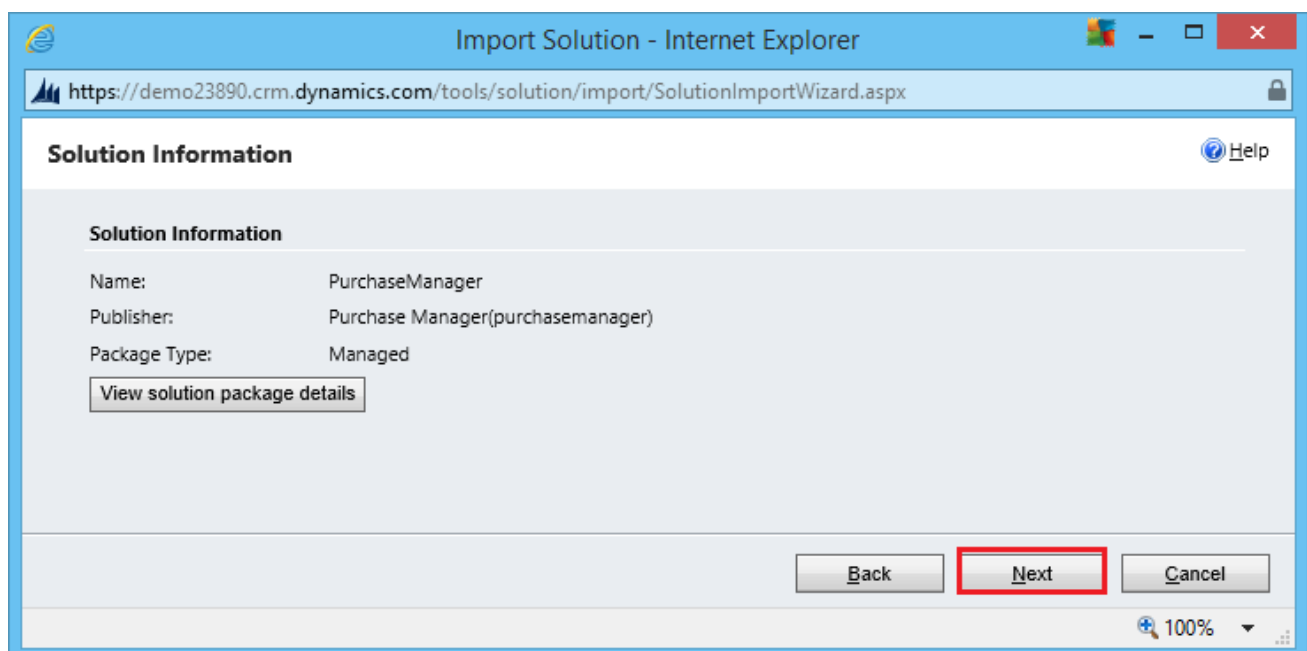
Figure 7: Solution Information

- Click on next to Continue

- Select the Check Box which comes in between as "**Activate any process and enable any SDK message processing steps included in the solution**." Press Import to continue.

    .

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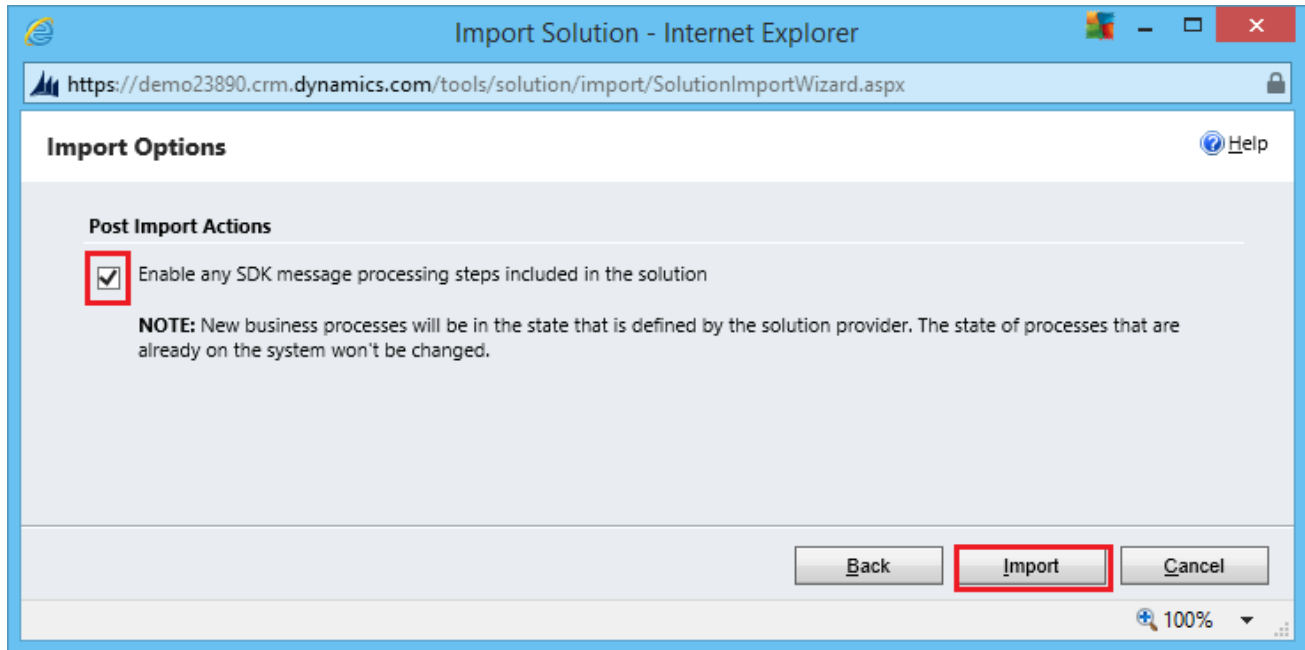
Figure 8 : Importing Options window

- Click on next 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.
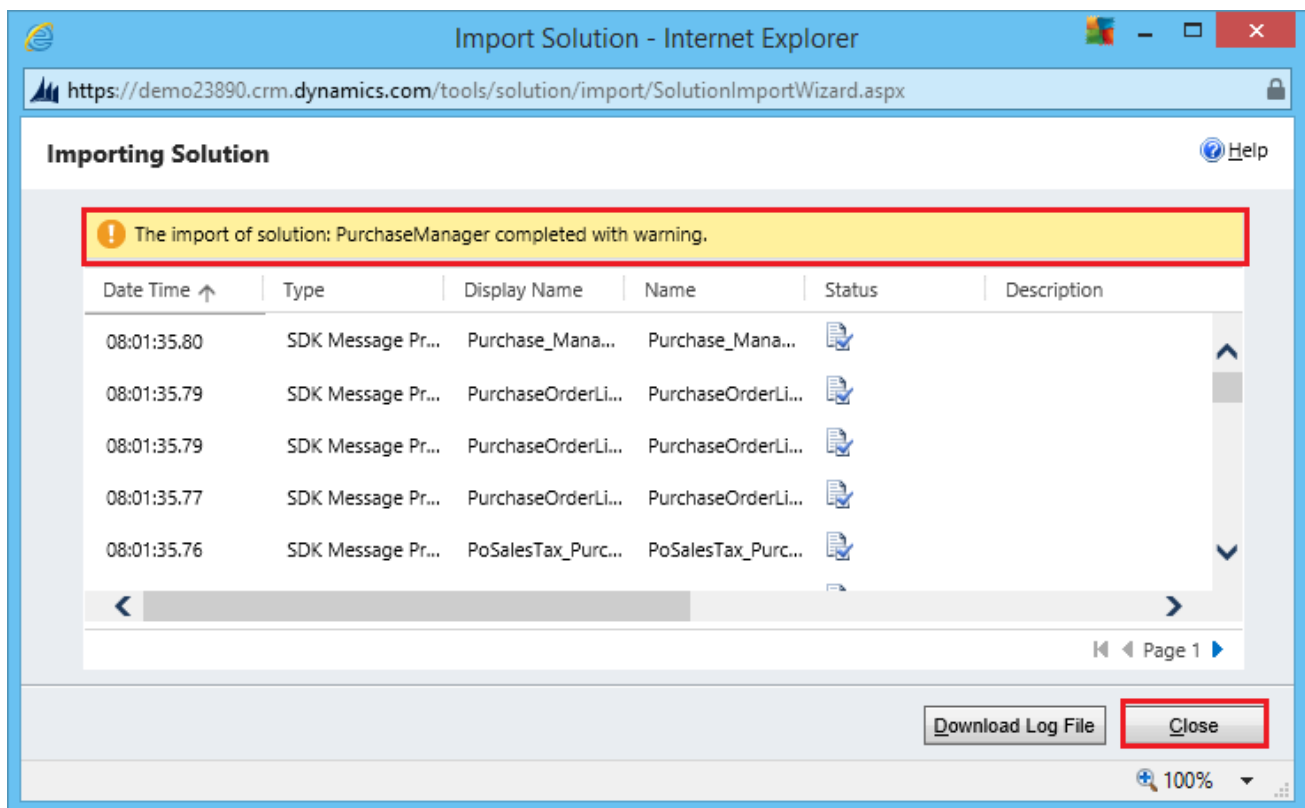
Figure 9: Importing Solution – Purchase solution

- Click on Close after successful completion message is displayed.

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How to get License Key?

- To install Purchase Manager you will require License key, which you can get by sending an email Request to salesteam@mtccrm.com with your Organization Unique name.

- To access your Organization Unique name click on **Settings→Customizations→Developer Resources** as shown below figure
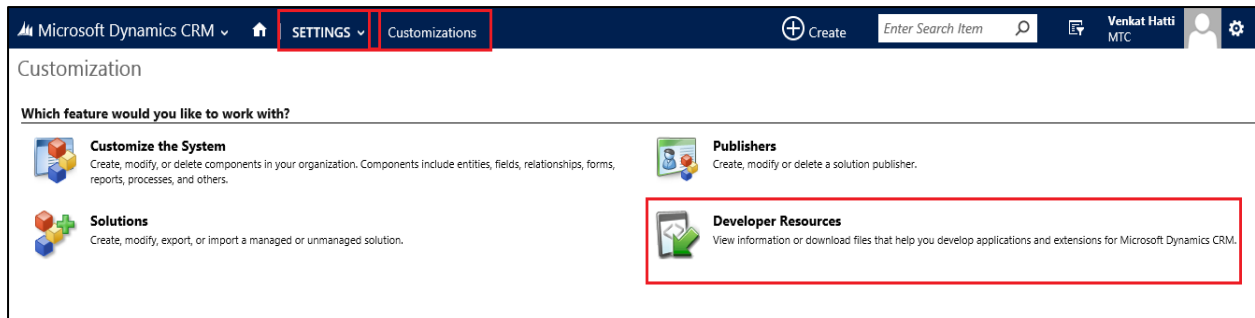

Figure 10: Developer Resources

- A window will pop up with Organization Unique Name as shown
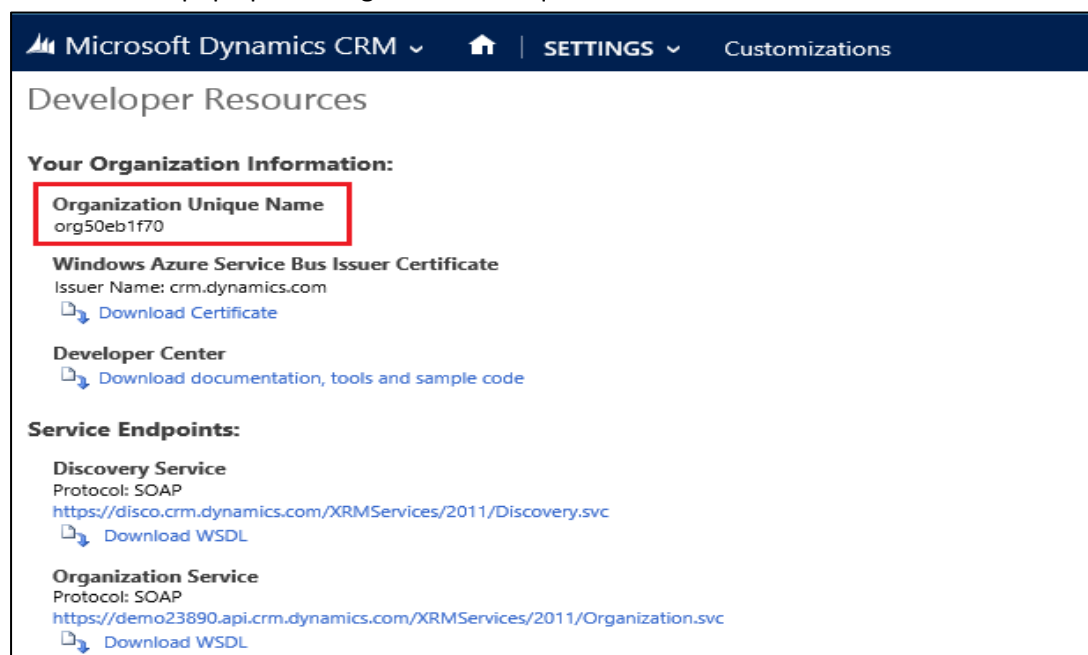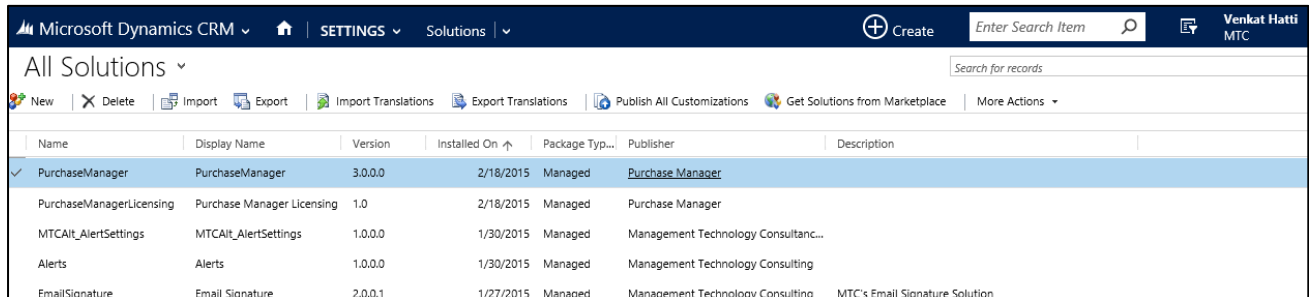
Figure 11 : Organization Unique Name

- 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 hrs.**

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Activating License Key

- After importing the Purchase Order Solution you need to place the License key navigate to **settings** →**solution**

Figure 12 : Navigation for licensing window
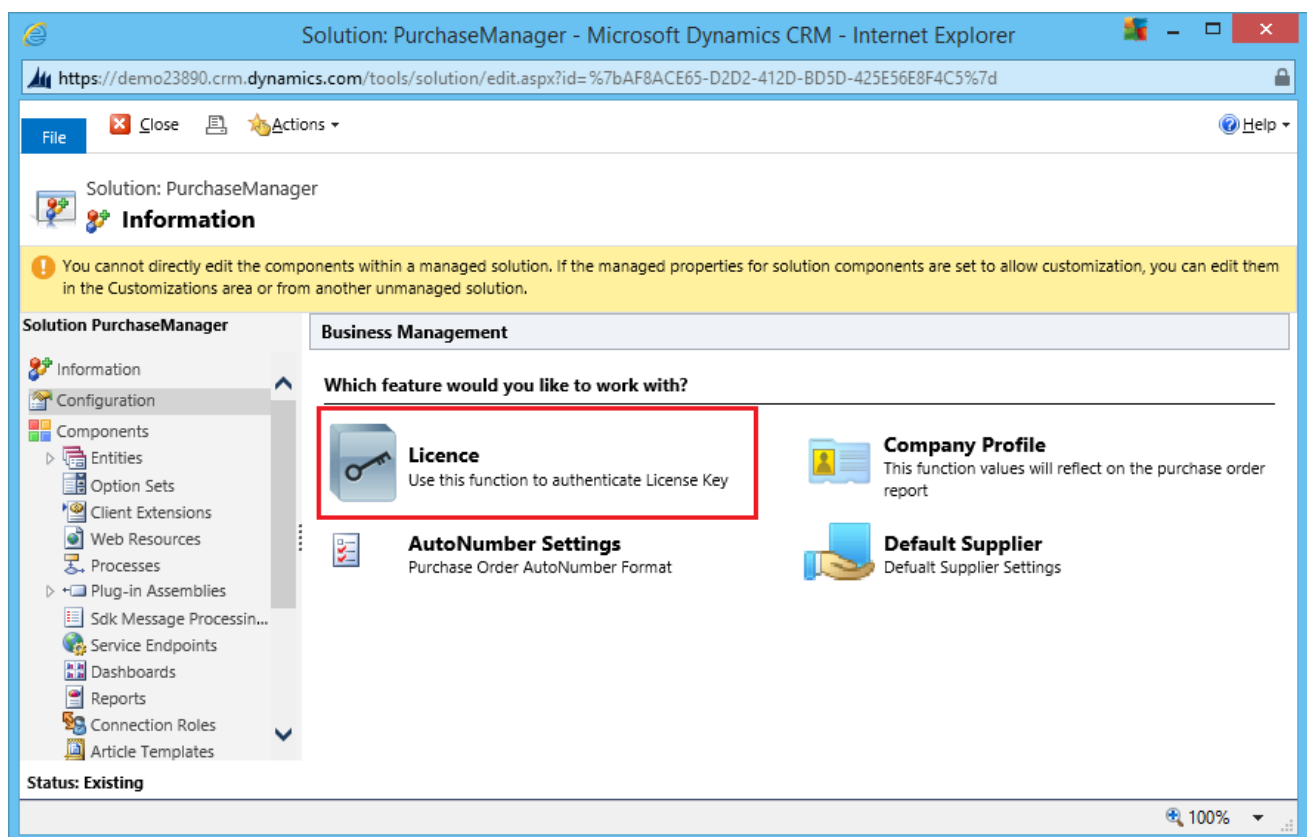
Figure 13: information - Configuration Screen

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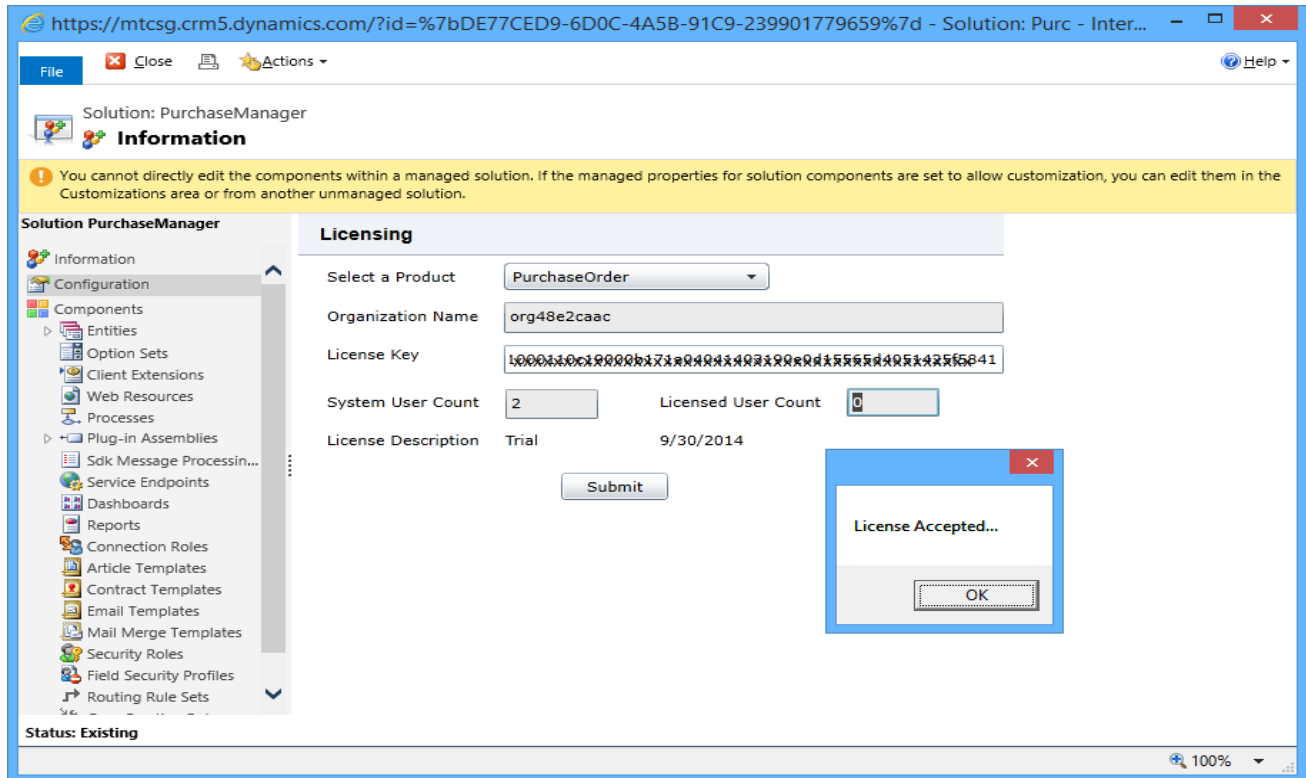
Figure 14 : Placing the License key

- Select Product as Purchase Order from the drop down list

- Enter the License key which you have received after placing the request

- Click on Submit tab

- Once License is accepted click ok to finish Installation process of the product.

- Refresh the CRM (Press F5)

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One Time Settings

Company profile

- Select the product as **Purchase Manager** in Solutions and click to open
- Click on Company profile
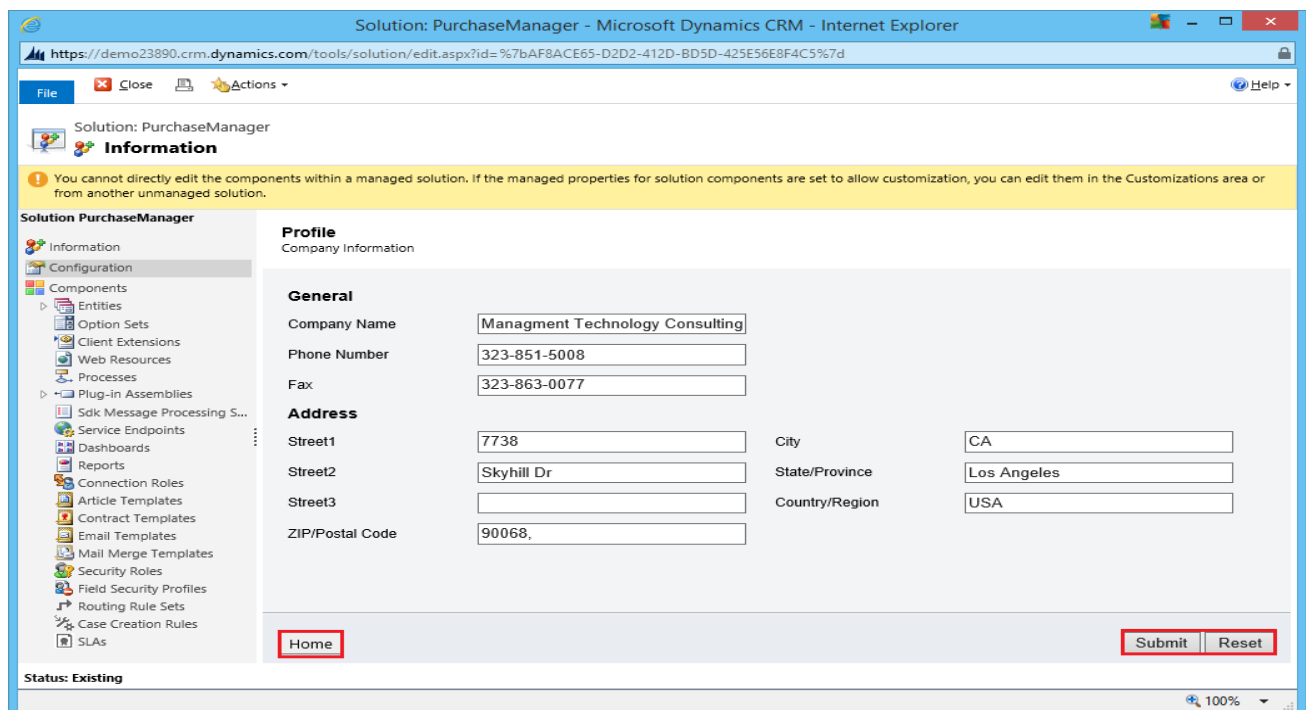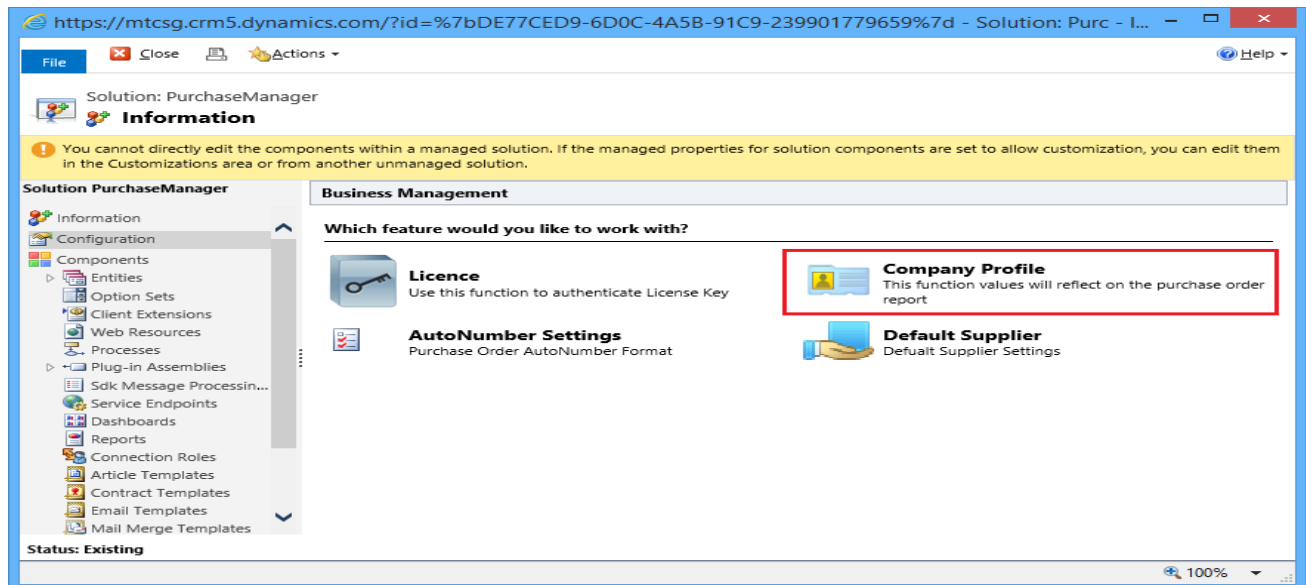
Figure 15: Company Details Settings

- 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

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Auto Number Settings

- Select the product as **Purchase Manager** in Solutions and click to open
- Click on Auto Number Settings
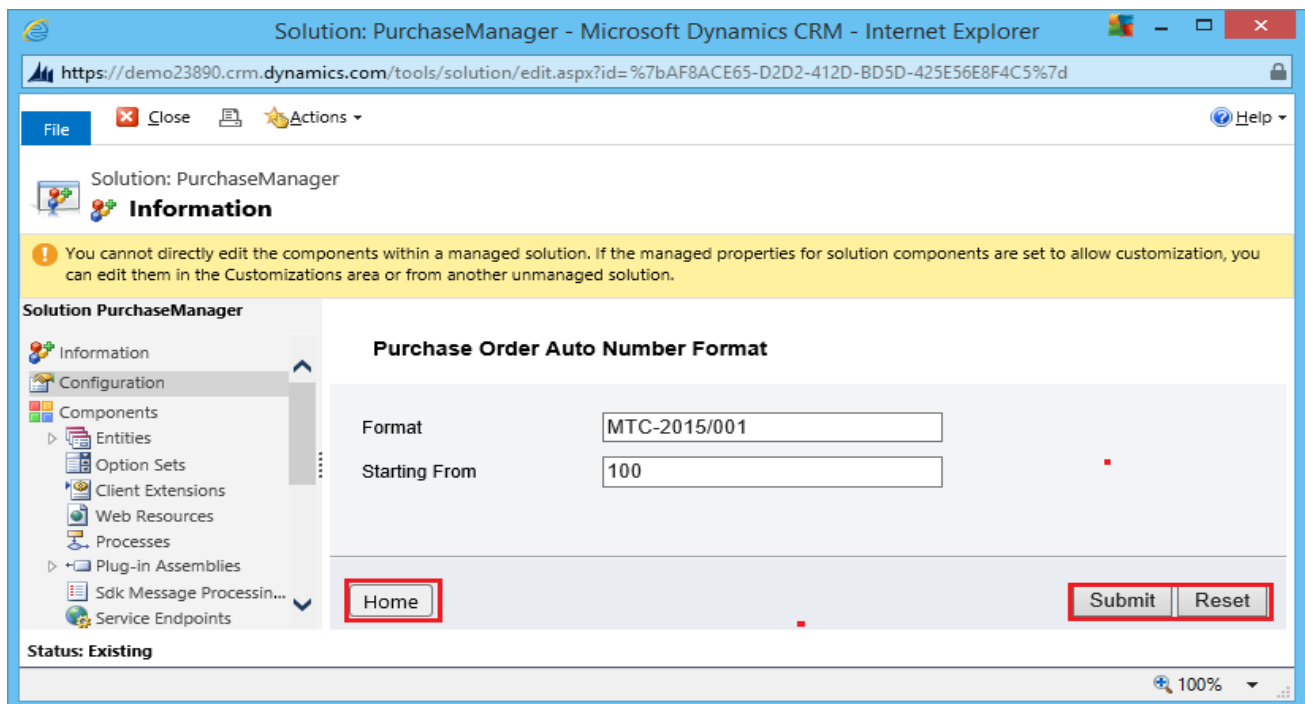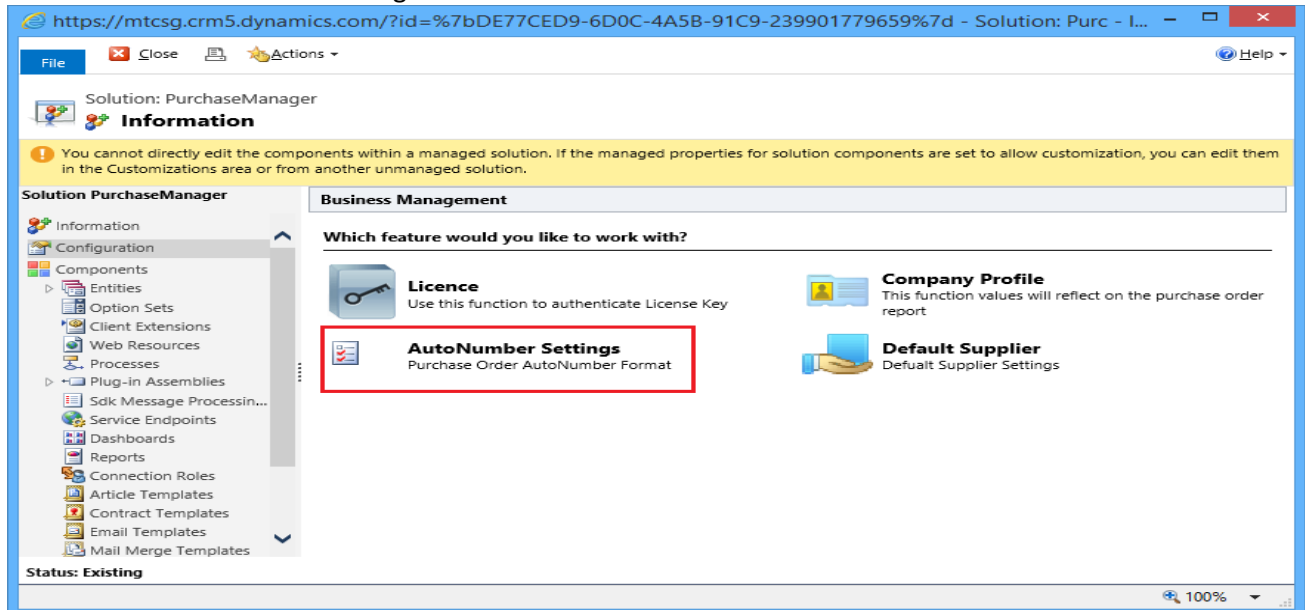
Figure 16: Auto Number - Setting

- Auto Number format is optional
- Enter the Format for Purchase order system. For example if you require as MTC-2015/001 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 Save or Reset is also available, Click on Home to go back to previous menu

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Default Supplier

- Select the product as **Purchase Manager** in Solutions and click to open

- Click on Default Supplier
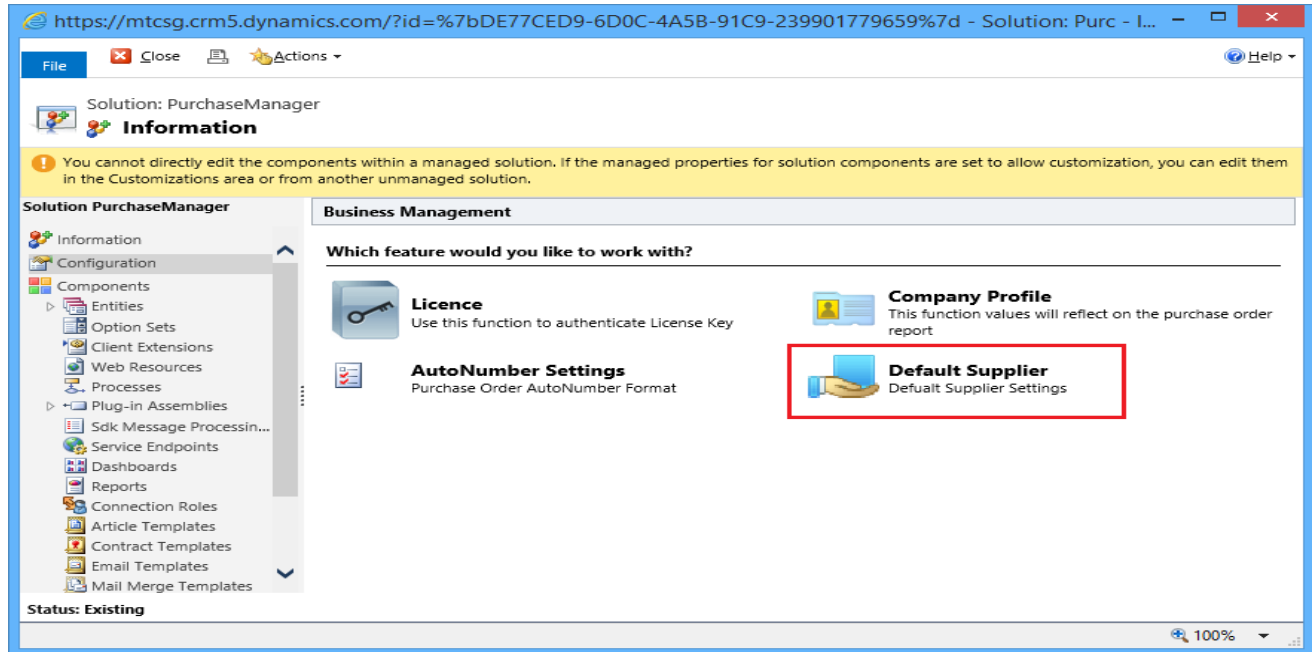
Figure 17; Default Supplier Settings

- Default Supplier, Default Cost and Default Tax Rate 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.
- Default Tax Rate: It allows to give tax rate between 1- 100%, which needed to apply while generating Purchase Order.
- If required select Attribute from list of Attributes are available to both Default Supplier and Default Cost, Click on Save.

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- 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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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 can be controlled by the Security Role functionality explained briefly here and in CRM guides and "Help".

A security role defines how different 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 which security roles 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
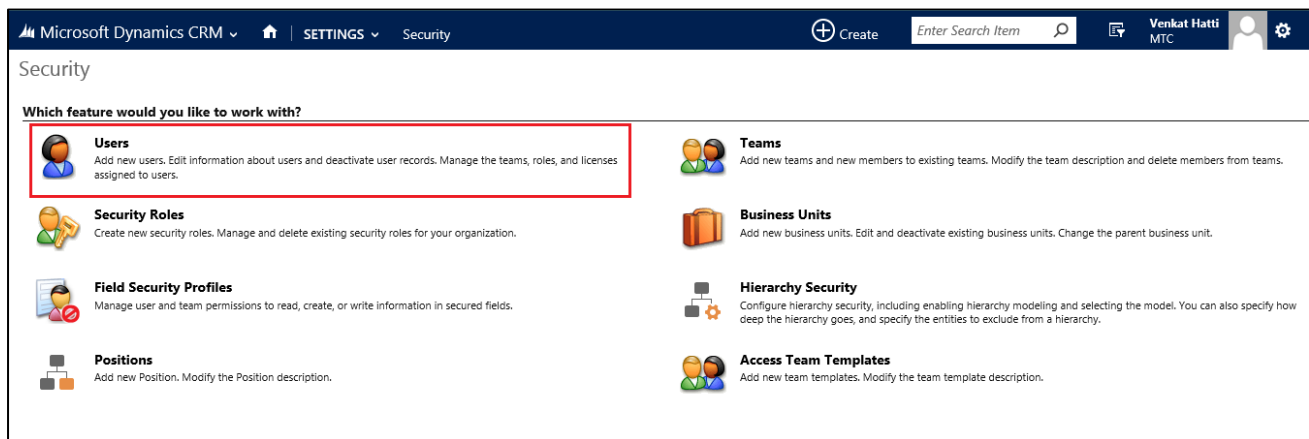
Figure 18 : Navigation for Security Roles

- 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
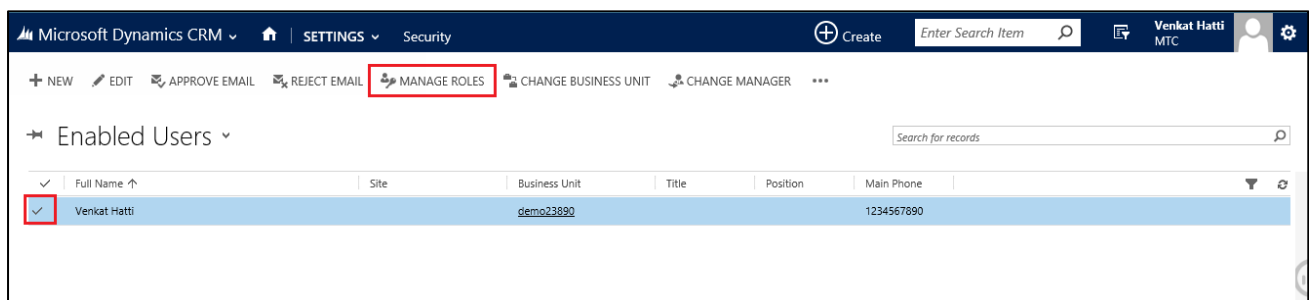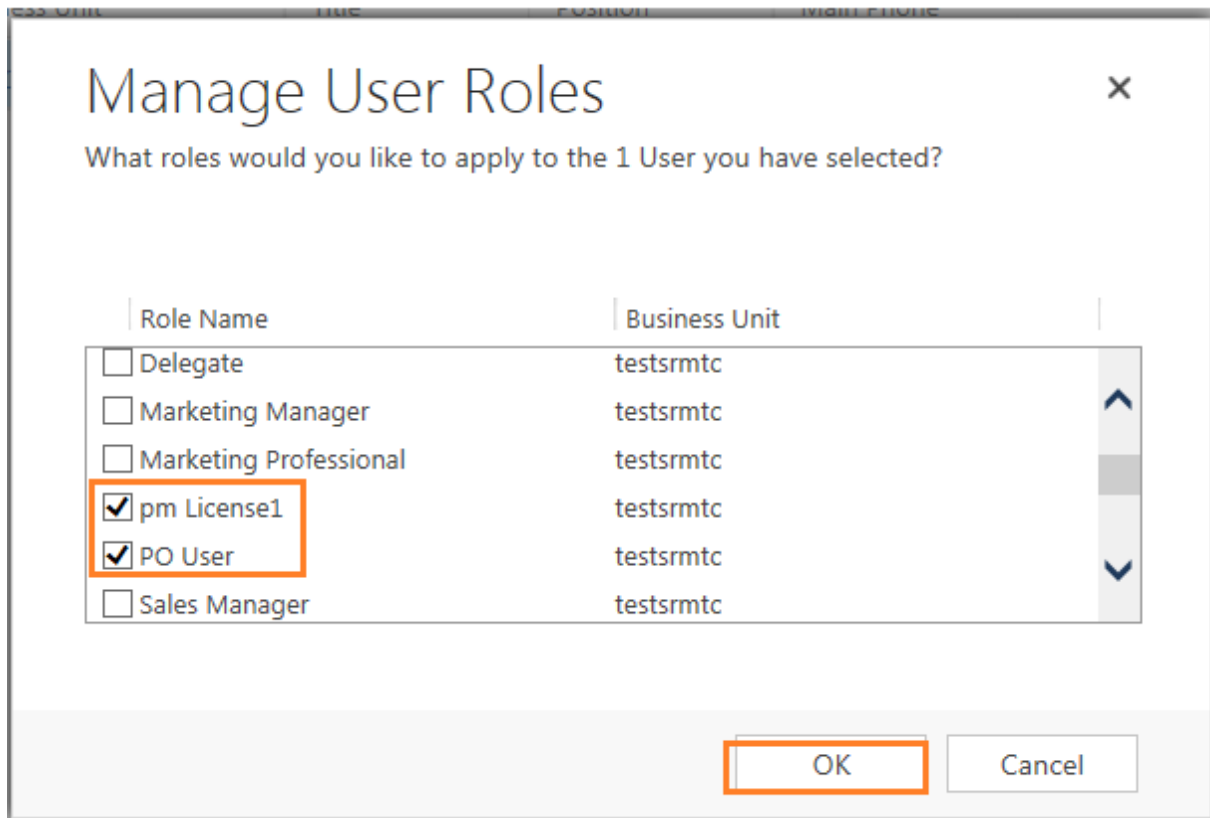
Figure 19 : Manage Roles window

- A new window will open as shown.
- Select the role as "**pm Licence1**", "**PO user**" and click on "**Ok**" to assign the role to the user.

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Figure 20 : Manage User Roles

Purchase Order Functionality

Purchase order allows buyers to clearly and explicitly communicate their intentions to sellers. Sellers are protected in case of a buyer's refusal to pay for goods or services. Purchase orders help a purchasing agent to manage incoming orders and pending orders

Creating of Order

- Navigation for creating the Purchase Order is **Sales → Order**
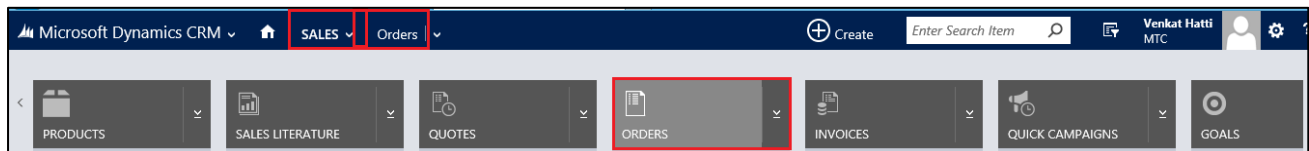
- Either create a New Order or Select form the Existing orders
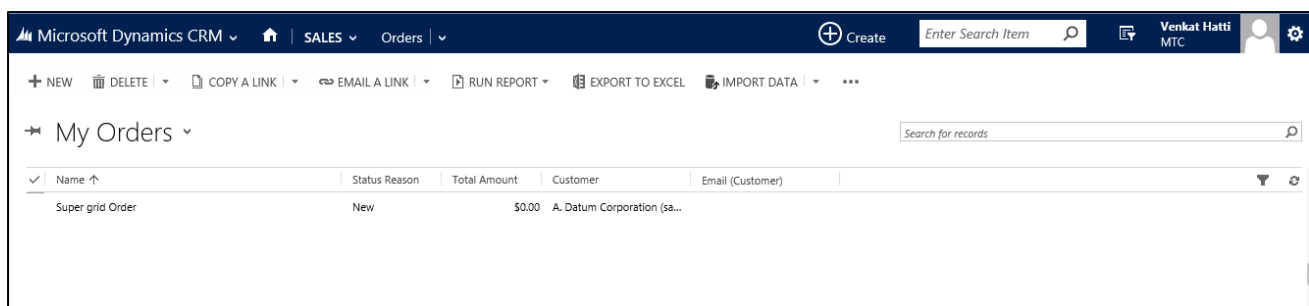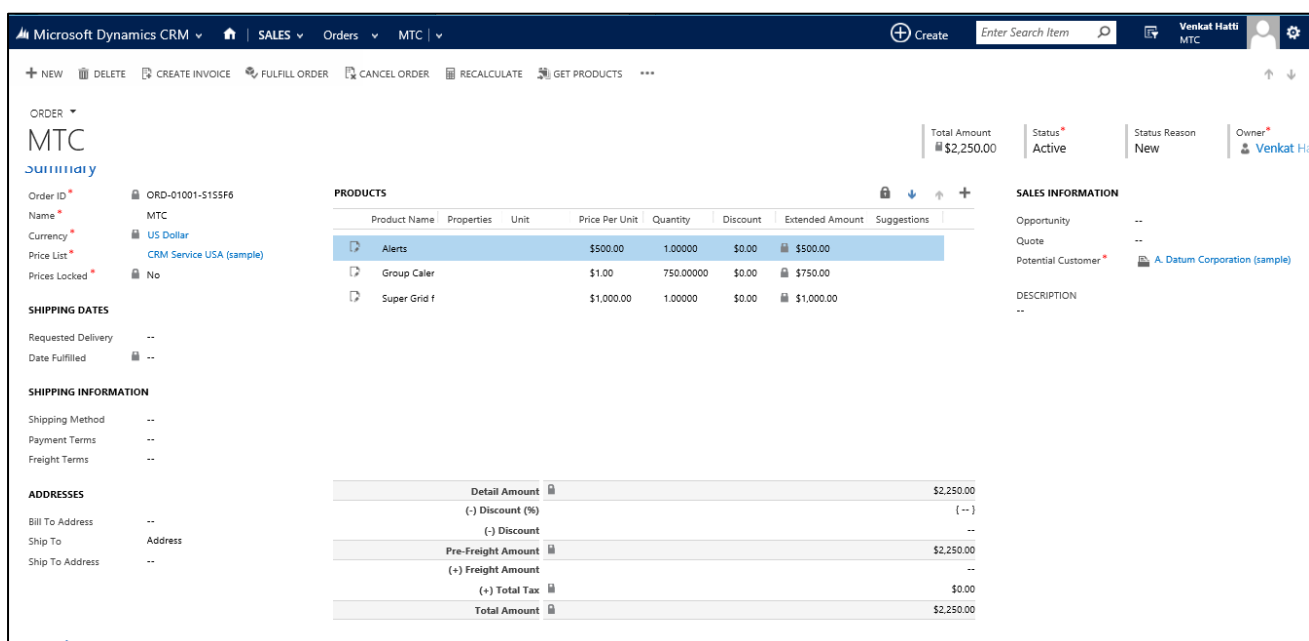
Figure 21: Navigation for Order

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

Figure 22: Order form

- Click on Save to continue

Products

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

Figure 23: Add Order 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

Generate P/O

- After adding the Order Products to generate the Purchase Order click on Generate p/o which is available at more CRM ribbon as shown below
- You can take the Print of this Order page by clicking on the Print Order button which is at CRM ribbon.

Figure 24: Generate P/O

- 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 Assign Suppliers.

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Figure 25: Assign Suppliers

- By clicking on the Set Supplier/Vendor button look up record window will open. This function only works if the Default Supplier is set at the beginning in Onetime Settings. Select the supplier.
- If the Set Supplier function is inactive then you can select the supplier with the help of Look up icon which is placed at the right most end of the row.
- For Unique suppler there will be a record created. For more than one supplier, there will be equal no of records created in the CRM

Create P/O's
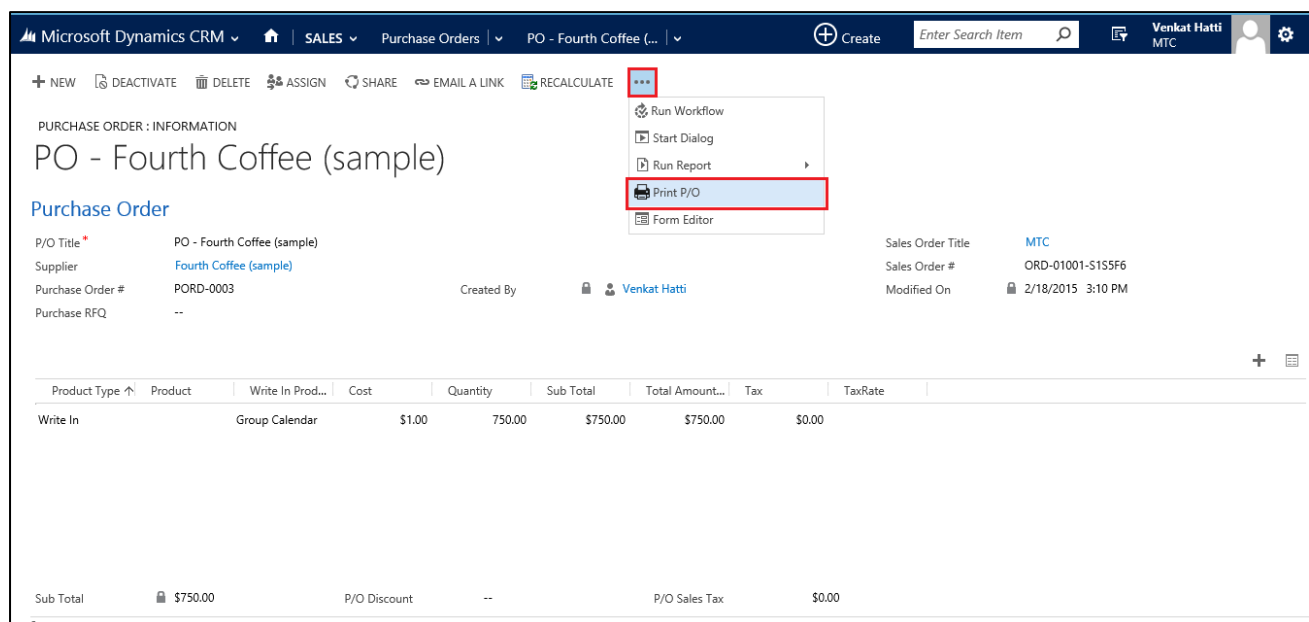
- Once all the required products are selected click on Create PO to generate PO.
- It display a message 'Creating Purchase Order'

Figure 26: Create P/O

- 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.
- Click on PO- Fourth Coffee (sample) – Name to open the PO

Figure 27: Purchase Order form in CRM

- Click on more (…) to get a drop down list.
- Select Print PO option to Print the Purchase Order

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Uninstallation Process

- To uninstall Purchase Order you need to delete Purchase Manager Solution. Navigation is **Settings →
  Solutions →** Select the check box of **Purchase Manager** then click on **Delete** as shown below
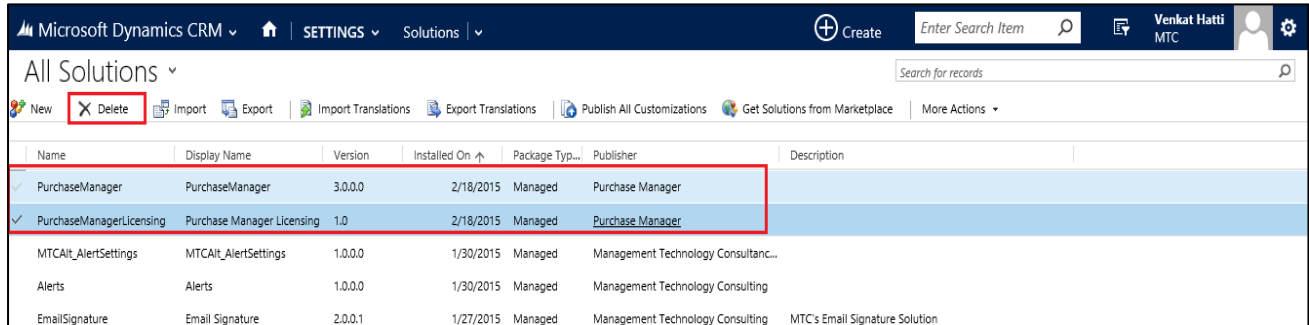
Figure 28 : Deleting Purchase Manger Solution

- Click on **OK** to delete the solution from CRM. The solution will be deleted
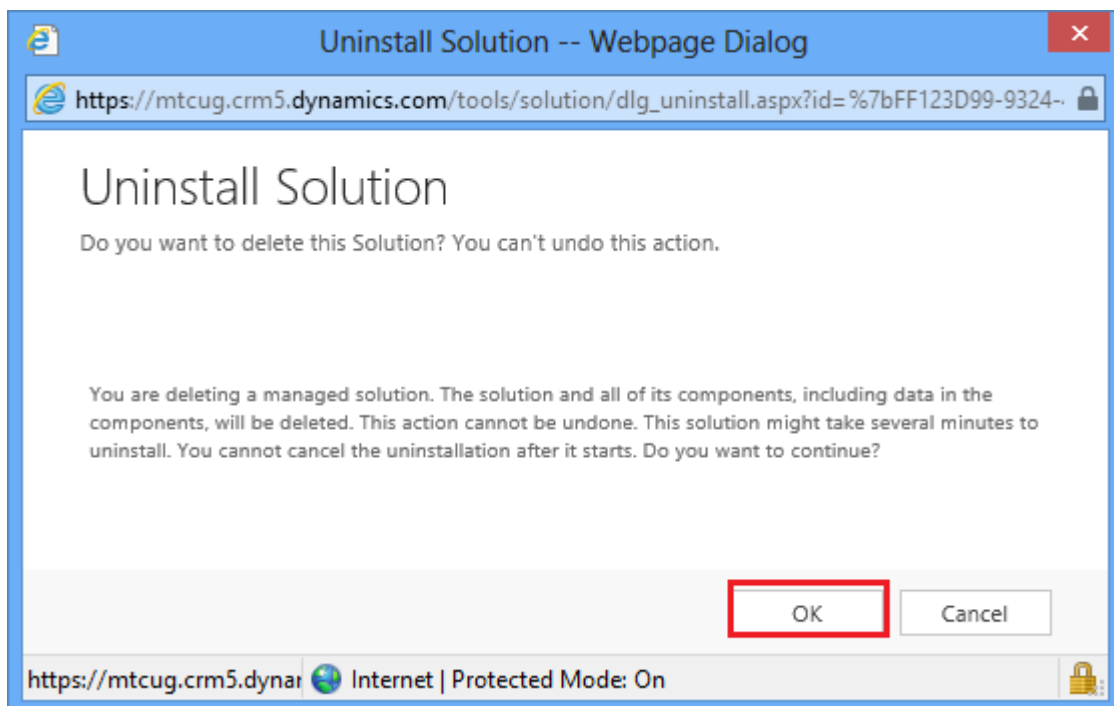
Figure 29: Solution Deleted

- Repeat the same for Purchase Manger Licensing also

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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

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