



TECH TRADE ESSENTIALS

**IN MICROSOFT DYNAMICS 365
BUSINESS CENTRAL**

V1.12.0.0

HOW TO INSTALL

Table of Contents

Table of Contents	2
Introduction.....	3
Installation	4
Permissions Configuration	6

Introduction

The WSB Tech Trade Essentials extension provides a collection of features and improved and new functionalities that will benefit many Microsoft Dynamics 365 Business Central customers active in the trade sector. These functionalities are developed for companies active in the wholesale of technical goods, but not limited to those companies, as the functionalities will benefit many other customers who wholesale goods.

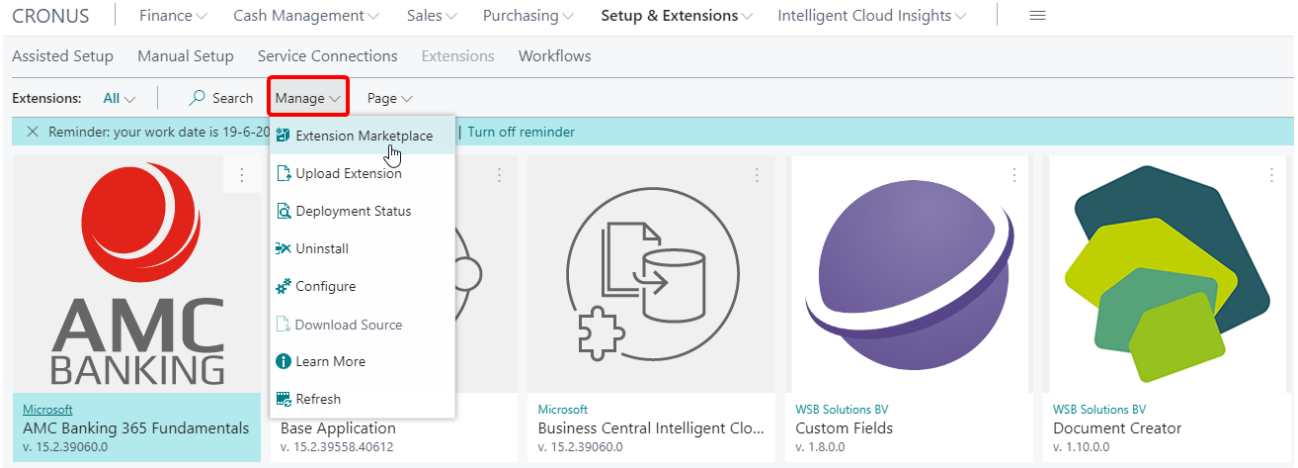
The extension is a collection of multiple features and will continually be improved and extended with new functionalities. Currently the extension comprises the following:

- ✓ Orig. Unit Price and Line Discount %
- ✓ Manual price
- ✓ Price Signaling
- ✓ Item Price Import/Export
- ✓ Close old price records

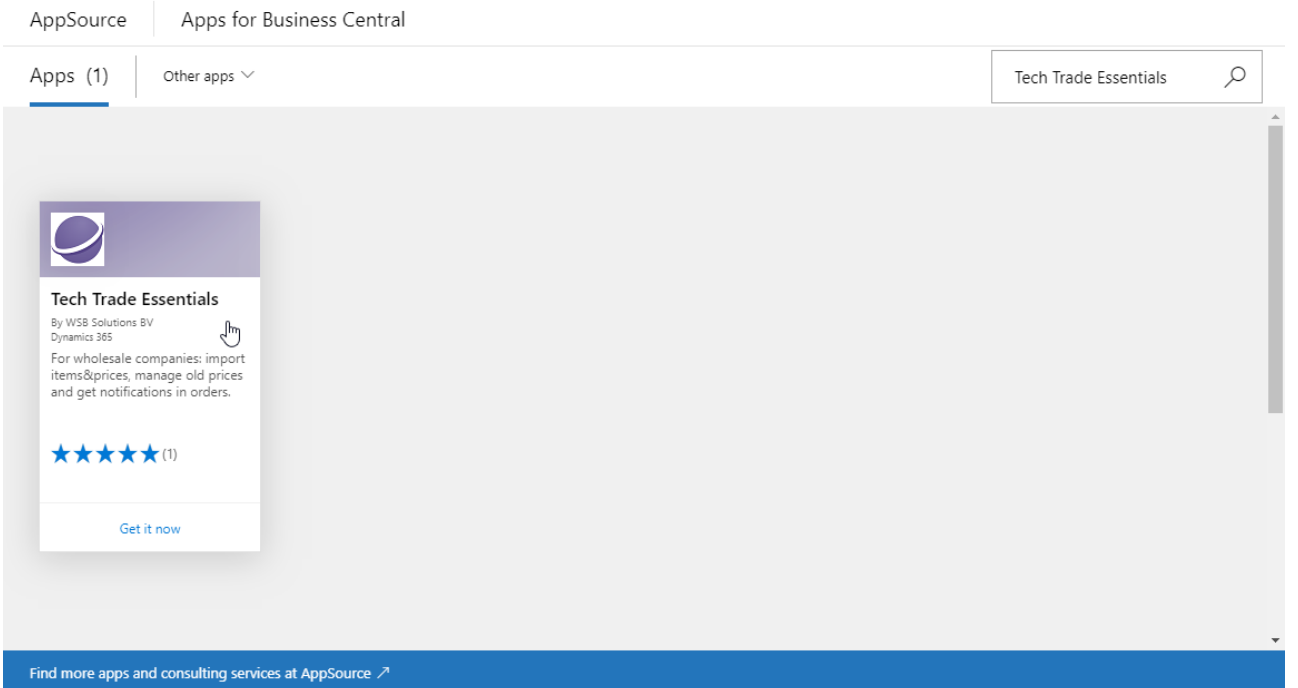
Installation

The WSB Tech Trade Essentials extension can be installed from the Extension Marketplace (AppSource). To install the extension, please follow the following steps:

1. In Microsoft Dynamics 365 Business Central, go to **Setup & Extensions > Extensions**
2. Open the Extension Marketplace (AppSource) via: **Manage > Extension Marketplace**




3. Search for and select "Tech Trade Essentials" (By WSB Solutions BV)



4. Please take note of the End-User License Agreement and Privacy Statement
5. Choose **GET IT NOW**, enter your details, and follow the further steps in the **Extension Installation** page that will open in Microsoft Dynamics 365 Business Central.

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Tech Trade Essentials

WSB Solutions BV

★★★★★ 5.0 (1)

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For wholesale companies: import items & prices, manage old prices and get notifications in orders.

Do you want to manage by exception, instead of checking every document? Are you a wholesaler with an extensive item database, and do you have a hard time keeping up with the suppliers price-updates? And even though you import the new prices on a regular base, you are still unsure if a price in a sales document is up to date? Let our Tech Trade Essentials app do assist you on these recurring tasks, so you can concentrate on what you do best!

With a large portfolio, maintenance of your items can be a time consuming task. Using Excel-based imports can be a time consuming task, and a small mistake can have a large impact. Excel is a great tool, and it is smart, but it can be a bit too smart. Chances are that number formats are incorrectly interpreted, causing wrong prices in your price lists. By saving the price list as a csv-file and import the csv file, you have two advantages: no more formatting issues, and a much, much shorter waiting time when you import 10-thousands of records. Missing items will be created and existing items updated. New price records will be generated and old prices records will receive an end date. When you create sales documents, sometimes you are in doubt if the price displayed is up-to date. With Tech Trade Essentials app, this is all history. When the applied sales price is older than a certain period (from setup), the price is displayed in a red font, so you can contact your supplier to check whether your price info is still up to date.

If a user changes the price, or the line discount, the system will store the original price and discount as calculated by Microsoft Dynamics 365 Business Central and it will flag the sales line as well as the entire order with a "Manual Price" checkmark. This enables a user to set a filter on sales documents with manually changed prices/discounts. This helps you to accelerate the invoice process, as you only have to check the documents with the "manual price" flag!

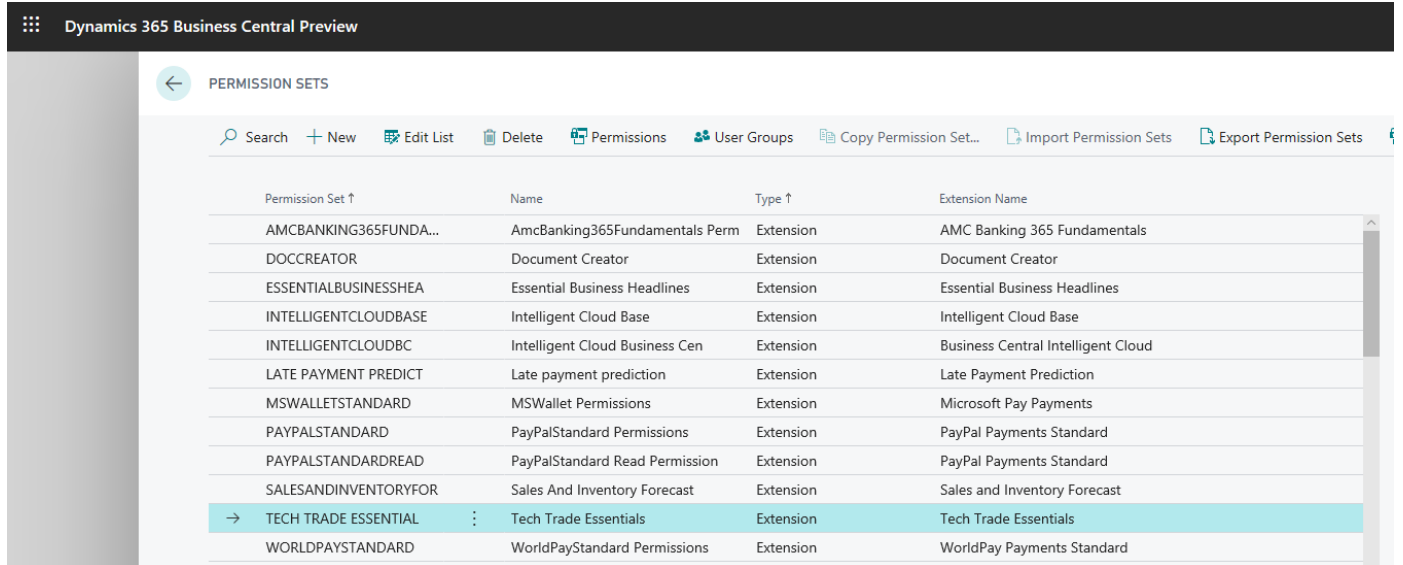
Features and benefits

- Import items and create purchase and sales prices in one run
- Close old price agreements
- Flag sales documents with changed prices or discounts
- Store the primary calculated price and discount in the sales lines
- Mark old sales prices in sales documents

Do you want to work more efficient? Just click on the "GET IT NOW" button and try the App Tech Trade Essentials for free. Or visit our [product](#)

Permissions Configuration

Once WSB Tech Trade Essentials extension has been installed, the permission set TECH TRADE ESSENTIALS has been added to the system.



The screenshot shows the 'PERMISSION SETS' page in Dynamics 365 Business Central. The table lists various permission sets, with 'TECH TRADE ESSENTIAL' highlighted in blue. The table has four columns: Permission Set, Name, Type, and Extension Name.

Permission Set ↑	Name	Type ↑	Extension Name
AMCBANKING365FUNDA...	AmcBanking365Fundamentals Perm	Extension	AMC Banking 365 Fundamentals
DOCCREATOR	Document Creator	Extension	Document Creator
ESSENTIALBUSINESSHEA	Essential Business Headlines	Extension	Essential Business Headlines
INTELLIGENTCLOUDBASE	Intelligent Cloud Base	Extension	Intelligent Cloud Base
INTELLIGENTCLOUDBC	Intelligent Cloud Business Cen	Extension	Business Central Intelligent Cloud
LATE PAYMENT PREDICT	Late payment prediction	Extension	Late Payment Prediction
MSWALLETSTANDARD	MSWallet Permissions	Extension	Microsoft Pay Payments
PAYPALSTANDARD	PayPalStandard Permissions	Extension	PayPal Payments Standard
PAYPALSTANDARDREAD	PayPalStandard Read Permission	Extension	PayPal Payments Standard
SALESANDINVENTORYFOR	Sales And Inventory Forecast	Extension	Sales and Inventory Forecast
→ TECH TRADE ESSENTIAL	Tech Trade Essentials	Extension	Tech Trade Essentials
WORLDPAYSTANDARD	WorldPayStandard Permissions	Extension	WorldPay Payments Standard

This permission set should be assigned to relevant users or user groups.

To assign the TECH TRADE ESSENTIALS permission set to users:

1. Choose the Lightbulb icon on the top right corner of the Microsoft Dynamics 365 Business Central to open search, enter **Users**, and then choose the related link.
2. Select the user that you want to assign permission to. Any permission sets that are already assigned to the user are displayed in the **Permission Sets** FactBox.
3. Choose the **Edit** action to open the **User Card** page.
4. On the **User Permission Sets** FastTab, on a new line, fill in the Permission Set field with TECH TRADE ESSENTIALS

For more information, please refer to Dynamics 365 Business Central documentation - [Managing Users and Permissions](#)