



## INSTALLATION & QUICK SETUP - IN Self Setup ES

In order to generate a complete cycle of the solution IN Self Setup ES, it is needed to follow the next steps:

### New company creation (Dynamics 365 Business Central ES version)

First of all, a company should be created. Once this step is done, the setup process can begin.

As shown in Fig. 1, this is the data of the company.

CREATE NEW COMPANY

SPECIFY SOME BASIC INFORMATION

Enter a name for the company.

\* TEST04

SELECT THE DATA AND SETUP TO GET STARTED.

Create New - No Data

Any Experience / No Sample Data / No Setup Data

Create a company with the desired experience for companies with any process complexity, and set it up manually.

Back Next Finish

Fig. 1: New Company Data.

### Assisted Setup

The first step is to choose the Self Setup Extension. In order to do so, click on the **light bulb**, as shown in Fig. 2, and then search for **Assisted Setup**.





Fig. 2: Search Button

Next, choose “Set up IN Self Setup ES”, as shown in Fig. 3.

Assisted Setup: All ▾   🔍 Search 📄 Open in Excel   More options	
NAME	STATUS
Set up approval workflows	Not Completed
Set up a customer approval workflow	Not Completed
Set up email	Not Completed
Set up email logging	Not Completed
Set up your Business Inbox in Outlook	Not Completed
Set up reporting data	Not Completed
Set up an item approval workflow	Not Completed
Set up a payment approval workflow	Not Completed
Set up Dynamics 365 for Sales connection	Not Completed
Set up VAT	Not Completed
Invite External Accountant	Not Completed
Set up consolidation reporting	Not Completed
Set up Intelligent Cloud	Not Completed
Set up eSign Facturae	Not Completed
Set up eSign ePDF	Not Completed
Set up IN Self Setup	Completed

Fig. 3: Assisted Setup List

## Customer Welcome Page and Data Load

Once the last steps are completed, it is needed to setup the solution through the Wizard.

This consists in the following steps:

1. Log in to the **Innova Portal** and copy the **Identifier** from the Customer Information section. The Customer Id is in the last section of document.
2. On the first page of the Wizard, paste the **Identifier** in the rectangle and click **Load Initial Data**, as in Fig. 4.

IN SELF SETUP WIZARD

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WELCOME TO IN SELF SETUP INSTALL WIZARD

Through the following screens, we will guide you to perform the initial configuration of your system. On each screen you will have access to help to facilitate your configuration.

LET'S GO!

The first thing we need is to load the initial data of the system. In this way, we will already have a base to work on, which we can modify.

LOAD DATA

For the initial load, we need to indicate the customer ID of the Innova Online portal and click on the Load Initial Data link.

[Load Initial Data](#)

Buttons: Delete, First, Back, Next, Last, Finish

Fig. 4: Welcome Wizard Page

At this point data should be loaded, which might take some minutes.

## Accounts Setup

Data has been loaded into the Wizard. It can be checked on Page 3 of the Wizard, and also in Fig. 5.

IN SELF SETUP WIZARD

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ACCOUNTS SETUP

From this screen you can configure the Accounts. These accounts are used in a subsequent screen to configure the Posting Groups Setup. You can see the help in the following link.

[Accounts Help](#)

You can change the characters number of auxiliary Accounts. It can be between 6 and 20.

Account Chars Number:

[Change Characters Number in Posting Accounts](#)

Accounts

SAVED	NO.	NAME	GEN. POSTING TYPE	GEN. BUS. POSTING GROUP	GEN. PROD. POSTING GROUP	VAT BUS. POSTING GROUP	VAT PROD. POSTING GROUP	INCOME STMT. BAL. ACC.
<input type="checkbox"/>	1	FINANCIACIÓN BÁSICA						
<input type="checkbox"/>	10	Capital						
<input type="checkbox"/>	100	Capital social						
<input type="checkbox"/>	1000	Capital social						
<input type="checkbox"/>	1000001	Capital social						
<input type="checkbox"/>	101	Fondo Social						

Buttons: Delete, First, Back, Next, Last, Finish

Fig. 5: Accounts Setup with Loaded Data

It should be checked that the loaded information is correct, and also that the user can make his own modification of the fields.

## Customers, Vendors and Items Pages

To demonstrate that data is working properly, it has been introduced some in the “Customers”, “Vendors”, and “Items” Wizard pages, as it can be seen below.



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## CUSTOMERS

From this screen you can configure the Customers. You can see the help in the following link.

[Customers Help](#)

Customers ▾

SA...	NO.	NAME	VAT REGISTR... NO.	ADDRESS	POST CODE	CITY	COUNTY	COUNTRY/... CODE	PHONE NO.	FAX NO.
<input type="checkbox"/>	CLDEMO	Cliente Demo	11111111H	C/ Demo 123	12001	CASTELLON/CAST...		ES	9000000	
<input type="checkbox"/>										



Delete First Back Next Last Finish

Fig. 6: Customers Data



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## VENDORS

From this screen you can configure the Vendors. You can see the help in the following link.

[Vendors Help](#)

Vendors ▾

SA...	NO.	NAME	VAT REGISTR... NO.	ADDRESS	POST CODE	CITY	COUNTY	COUNTRY/... CODE	PHONE NO.	FAX NO.
<input type="checkbox"/>	PRDEMO	Proveedor Demo	11111111H	C/ Demo 123	12001	CASTELLON/CAST...		ES	9000000	
<input type="checkbox"/>										



Delete First Back Next Last Finish

Fig. 7: Vendors Data



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## ITEMS

From this screen you can configure the Items. You can see the help in the following link.

[Items Help](#)

Items ▾

SAV...	NO.	DESCRIPTION	TYPE	BASE UNIT OF MEASURE	COSTING METHOD	UNIT COST	UNIT PRICE	INVENTORY POSTING GROUP	GEN. PROD. POSTING GROUP	VAT PROD. POSTING GROUP
<input type="checkbox"/>	PDEMO	Producto Demo	Inventory	UDS	FIFO	0,00	0,00	MERCADERIA	MERCADERIA	IVA21
<input type="checkbox"/>										

Delete First Back Next Last Finish

Fig. 8: Items Data

Also, this type of page can be filled manually. From the “Edition Page” data can be processed to Excel.

## Setup Pages

Data has been also introduced in the setup pages that can be found next:



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## GENERAL LEDGER SETUP

From this screen you can configure the most important data for General Ledger Setup. You can see the help in the following link.

[General Ledger Setup Help](#)

## GENERAL

VAT Cash Regime ☒

## NUMBER SERIES

Bank Account No. 

Autoinvoice Nos. 

Autocredit Memo Nos. 

Delete First Back Next Last Finish

Fig. 9: General Ledger Setup data



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### INVENTORY SETUP

From this screen you can configure the most important data for Inventory Setup. You can see the help in the following link.

[Inventory Setup Help](#)

#### GENERAL

Default Costing Method ..... FIFO

#### NUMBER SERIES

Items Nos. .... PROD

Fig. 10: Inventory Setup data



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### SALES SETUP

From this screen you can configure the most important data for Sales Setup. You can see the help in the following link.

[Sales Setup Help](#)

#### GENERAL

Show Credit and Stock warnings ..... ☐

Copy comments in documents ..... ☐

Calculate Invoice and Payment Discounts ..... ☐

#### NUMBER SERIES

Customer Nos. .... CLI

Order Nos. .... PV

Return Order Nos. ....

Invoice Nos. .... FVP

.....

Fig. 11: Sales Setup data

IN SELF SETUP WIZARD

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PURCHASE SETUP

From this screen you can configure the most important data for Purchase Setup. You can see the help in the following link.

[Purchase Setup Help](#)

**GENERAL**

Copy comments in documents ☒

Calculate Invoice and Payment Discounts ☒

Mandatory External Documents ☒

**NUMBER SERIES**

Vendor Nos.

Order Nos.

Return Order Nos.

Invoice Nos.

Fig. 12: Purchase Setup data

IN SELF SETUP WIZARD

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FIXED ASSET SETUP

From this screen you can configure the most important data for Fixed Asset Setup. You can see the help in the following link.

[Fixed Asset Setup Help](#)

**GENERAL**

Default Depr. Book

Allow Posting to Main Assets ☒

**NUMBER SERIES**

Fixed Asset Nos.

Insurance Nos.

Fig. 13: Fixed Asset Setup data

## Summary

Finally, after all the configuration is done, the last page will show the summary. An example can be seen in Fig. 14.

[Delete](#)
[First](#)
[Back](#)
[Next](#)
[Last](#)
[Finish](#)

←

POSTED PURCHASE INVOICE

+

19FC00001 · Proveedor Demo

Correct

Invoice

Print/Send

Navigate

More options

General

Show more

Vendor

Proveedor Demo

Due Date

05/07/2019

Contact

Contacto Demo

Vendor Invoice No.

FP001

Posting Date

05/06/2019

Lines

Manage

More options

TYPE	NO.	DESCRIPTION	QUANTITY	UNIT MEAS CODE
Item	<div></div> PDEMO	Producto Demo	1	UDS

Invoice Discount A...

0,00

Total VAT (EUR)

210,00

Total Excl. VAT (EUR)

1.000,00

Total Incl. VAT (EUR)

1.210,00

8

Finally, it can be seen that the total price has been loaded into the Chart of Accounts.

Chart of Accounts: <i>Custom filtered</i> <span>Search</span> <span>+ New</span> <span>Manage</span> <span>Process</span> <span>Report</span>				
NO. ▼		NAME	NET CHANGE	BALANCE
6	⋮	COMPRAS Y GASTOS	1.000,00	1.000,00
60		Compras	1.000,00	1.000,00
600		Compras de mercaderías	1.000,00	1.000,00
6000		Compras de mercaderías	1.000,00	1.000,00
6000001		Compras de mercaderías	1.000,00	1.000,00

Fig. 16: Chart of Accounts Data

The following steps will implement a Sales Invoice.

It has been made a sales invoice for a specific customer, as shown in Fig. 17.

← POSTED SALES INVOICE
 ✎
+
🗑

## 19FV00001 · Cliente Demo

Invoice
Correct
Print/Send
Navigate
More options

### General

Show more

No. ....	19FV00001	Due Date ....	05/07/2019
Customer .....	Cliente Demo	Quote No. ....	
Contact .....	Contacto Demo	Order No. ....	
Posting Date .....	05/06/2019	Closed .....	<input type="checkbox"/>

**Lines**
Manage
More options
🔍

TYPE	NO.	DESCRIPTION	QUANTITY	UNIT MEAS CODE
Item	⋮ PDEMO	Producto Demo	1	UDS

Invoice Discount A...	0,00	Total VAT (EUR) .....	252,00
Total Excl. VAT (EUR) ..	1.200,00	Total Incl. VAT (EUR) ..	<b>1.452,00</b>

Fig. 17: Sales Invoice Data

Finally, it can be seen that the price has been loaded into the Chart of Accounts.

Chart of Accounts: <i>Custom filtered</i> ▾					Search		+ New	Manage ▾	Process ▾	Report
NO. ▼		NAME		NET CHANGE						BALANCE
7	⋮	VENTAS E INGRESOS		-1.200,00						-1.200,00
70		Ventas mercaderías y servicios		-1.200,00						-1.200,00
700		Ventas de mercaderías		-1.200,00						-1.200,00
7000		Ventas de mercaderías		-1.200,00						-1.200,00
7000001		Ventas de mercaderías		-1.200,00						-1.200,00

Fig. 20: Chart of Accounts Data