

# User Guide



## Purchase Manager

For Microsoft Dynamics 365 / CRM

*Document Version: 2.0*

*Solution Version: 365\_032018\_3\_19*

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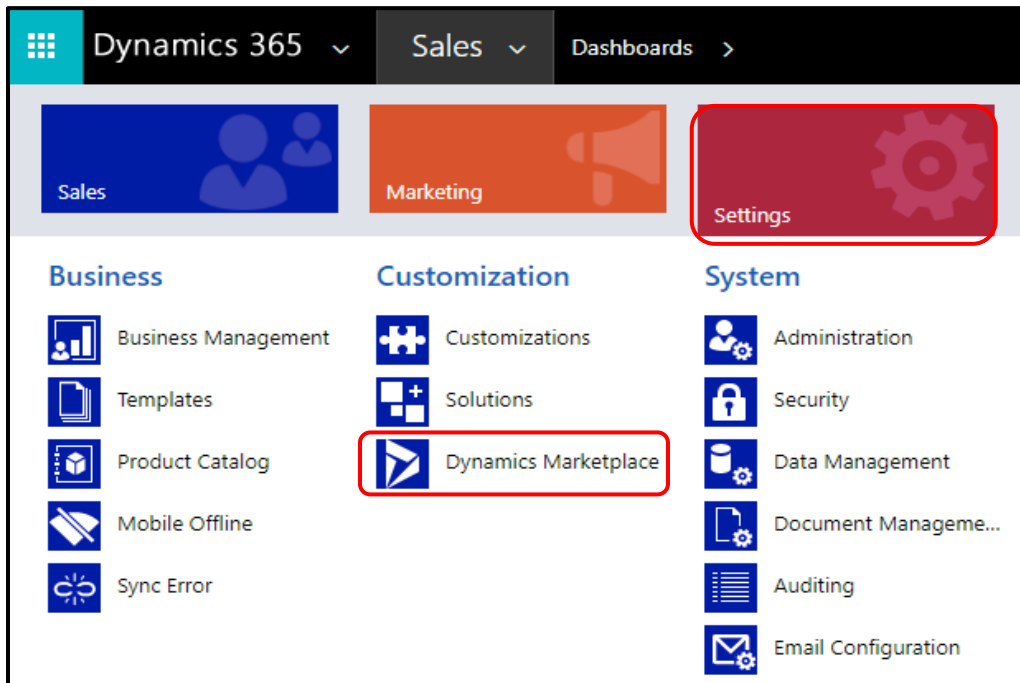
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## How to Install Purchase Manager in your Dynamics 365?

To **Install** MTC's Purchase Manager Add-on solution into your Dynamics 365, please follow the below instructions.

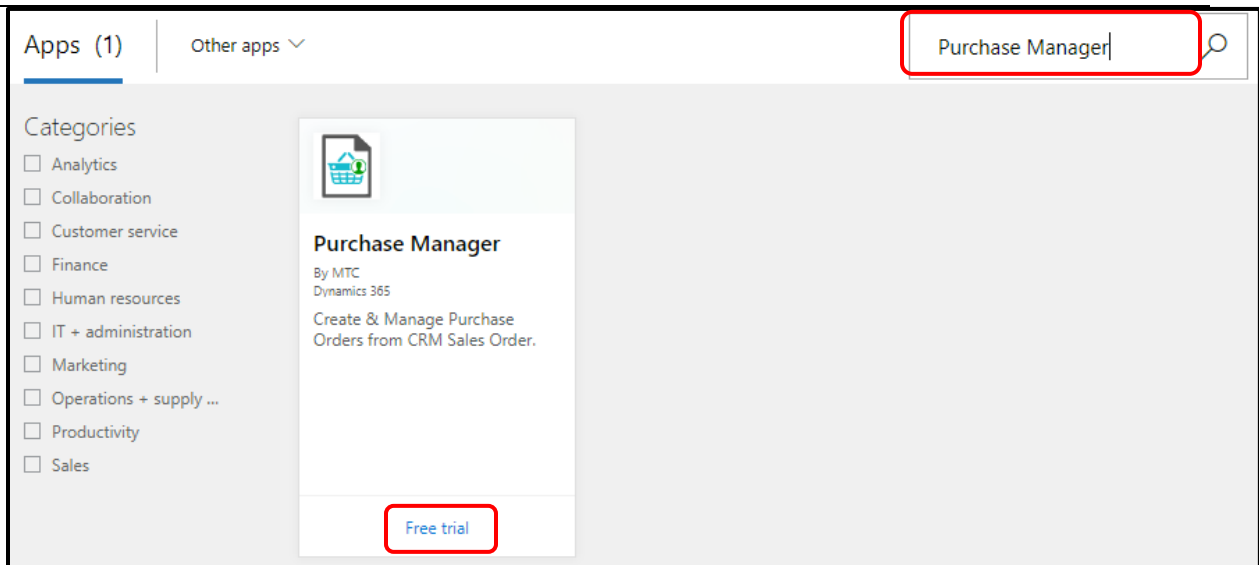
### Step1:

- Navigate to **Dynamic 365** → **Settings** and click on **Dynamics Marketplace**.



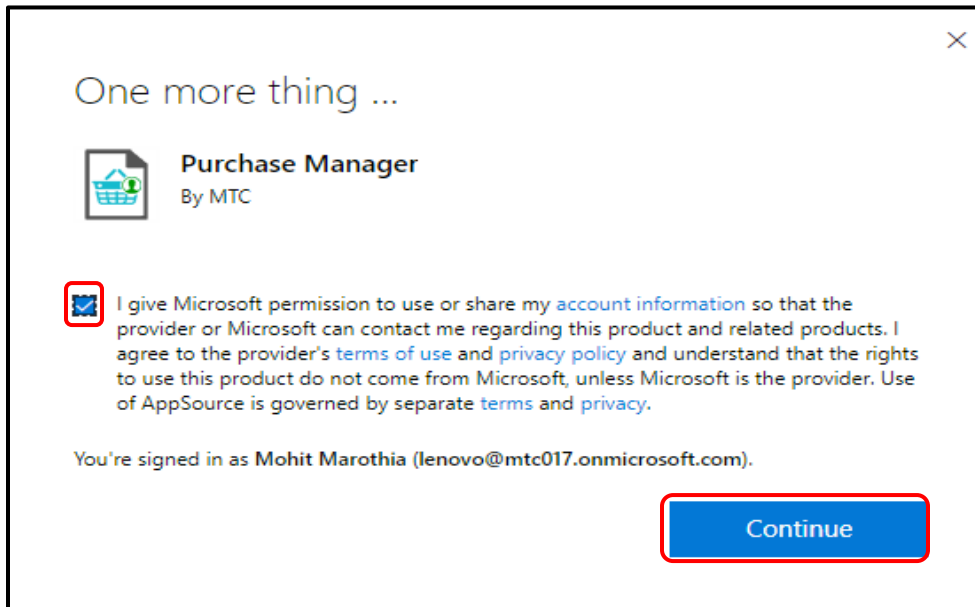
### Step2:

- In search box search for **Purchase Manager by MTC** and click on **free trial**.



### Step3:

- Tick the **Check Box** to give permissions and click on **Continue**.



### Step4:

- Tick the two check boxes to agree **Microsoft Legal Terms and conditions** and agree to **Privacy Statement and Legal Terms** and click on **Agree** for importing the solution.

Add the application to Dynamics 365

Select the Dynamics 365 organization you want to add this application to.

Connect to Dynamics 365

Organization to add the application to: MTC (orgd1ffb4b4)

☒ Agree to Microsoft's [Legal Terms](#) and [Privacy Statement](#)

☒ Agree to [Privacy Statement](#) and [Legal Terms](#) for importing solutions into Dynamics 365

**Agree** **Cancel**

### Step5:

- After clicking on agree the **Installation Process Begins**.

Office 365 Groups	2.8.0.0	1/1/2050	Not installed
Project Service Automation	1.2.1.56	1/1/2050	Not installed
PurchaseManager	365.62017.3.5	1/1/2050	Installing
Voice of the Customer for ...	9.0.925.5	1/1/2050	Not installed

- After completing the installation, you will notice that **licensing solution** also installed along with **Purchase Manager Solution**.

### Step6:

- To get the free trial Click on **licensing solution**.

All Solutions ▾

New | Delete | Import | Export | Clone a Patch | Clone Solution | Apply Solution Upgrade | Import Translations

Name	Display Name	Version	Installed On ↓	Package Type	Publisher
PurchaseManager	PurchaseManager	365.062017....	10/4/2017	Managed	Purchase Manager
✓ Licensing	Licensing	1.0.5.5	9/20/2017	Managed	Management Technology Consultanc...
MTC_CreditCardProcessing	MTC Credit Card Processing	365.092017....	9/20/2017	Managed	Management Technology Consultanc...
FieldServiceDemoAutoMove	Field Service Demo Auto ...	6.1.0.1	9/1/2017	Managed	Dynamics 365
ResourceSchedulingDemo...	Resource Scheduling Dem...	1.0.0.4	9/1/2017	Managed	Dynamics 365
ProjectServiceDemoData	Project Service Demo Data	1.0.1.4	9/1/2017	Managed	Dynamics 365
SiteMapCustomization	Trial Site Map Customization	1.8	9/1/2017	Managed	Microsoft Dynamics 365
FreeTrialBaseSolution2	Trial Base Solution	2.1.0.0	9/1/2017	Managed	Microsoft Dynamics

- You will be redirected to Account Registration window.

### Step7:

- Please fill up the **Account Information** and click on **submit**. "This will be a onetime activity."

**LICENSE INFORMATION**

First Name*	Mohit	Last Name*	Marothia
Phone*	1234567892	Company*	www.mtccrm.com
Website*	mtccrm.com	Email*	mohit@mtccrm.com
City*	hyderabad	State/Province*	ts
Country*	india	Zip/Postal Code*	500050
<input type="button" value="Submit"/>			

- The account registration window refreshes and loads up with MTC products just below the account details.
- You can notice **Purchase Manager Solution** status as **Installed**.

BackOfficeBundle				<a href="#">Purchase As Bundle</a>	<a href="#">Update License</a>
	Expense Manager		<a href="#">Get it Now</a>		
	Revenue ForeCast Manager		<a href="#">Get it Now</a>		
	Credit Card Processing		<a href="#">Get it Now</a>		
	Purchase Manager		Installed	<a href="#">Purchase License</a>	<a href="#">Update License</a>

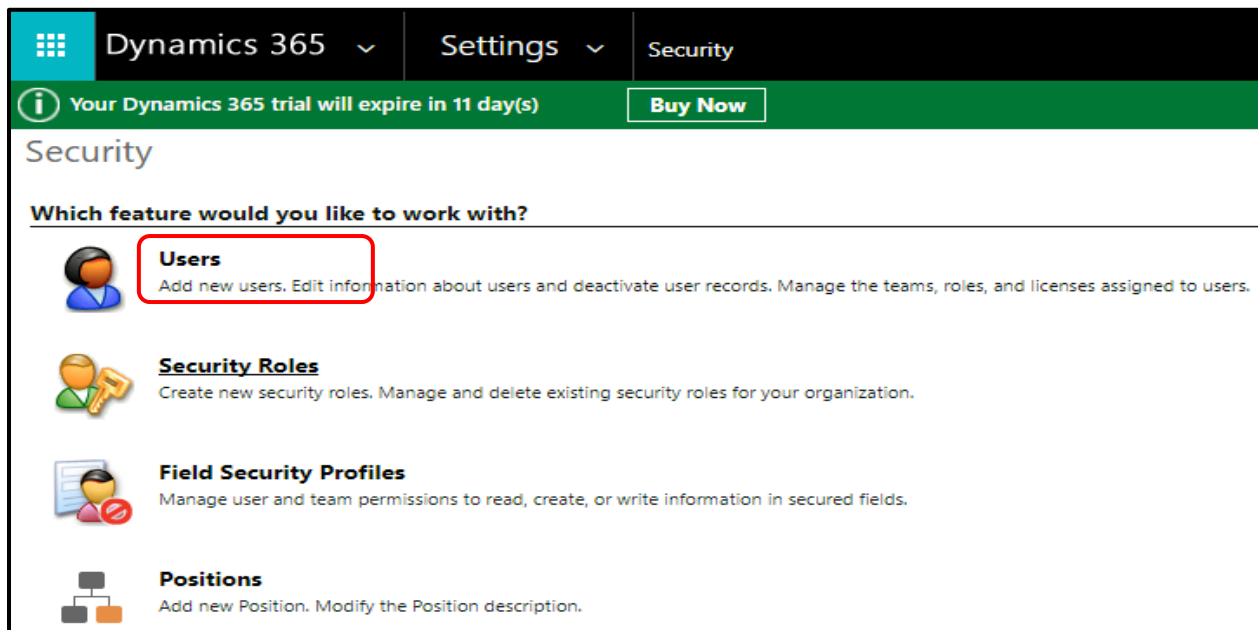
**Note:** The free trial license key is generated and activated on the first use of the product.

## How to Configure Purchase Manager Security Roles in your Dynamics 365?

Any user other than CRM Administrator must have Purchase Manager Security roles to access the solution. Only a CRM Administrator can administer these security roles using the below procedure.

### Step1:

- Navigate to Dynamics 365 → Settings → Security.
- Click on Users.



### Step2:

- 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, click on **Manage Roles** in the ribbon as shown.



Dynamics 365 ▾ Settings ▾ Security

**Info** Your Dynamics 365 trial will expire in 11 day(s) [Buy Now](#)

+ NEW EDIT APPROVE EMAIL REJECT EMAIL PROMOTE TO ADMIN **MANAGE ROLES** CHANGE BUSINESS UNIT CHANGE MANAGER

➤ Enabled Users ▾

✓	Full Name ↑	Site	Business Unit	Title	Position	Main Phone
✓	Mohit Marothia		<a href="#">pass987</a>			1364646445

### Step3:

- A new window will open as shown.
- Tick the check boxes of roles as “MTC License”, “PO user” and click on “Ok” to assign the role to the user.

**Manage User Roles** ✕

What roles would you like to apply to the 1 User you have selected?

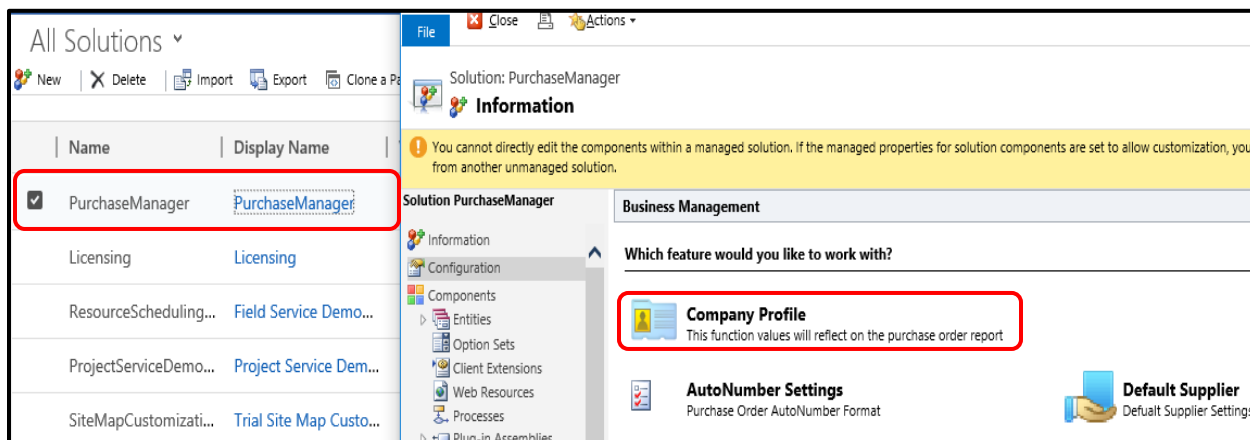
Role Name	Business Unit
<input type="checkbox"/> Marketing Manager	pass987
<input type="checkbox"/> Marketing Professional	pass987
<input type="checkbox"/> MTC Alerts	pass987
<input type="checkbox"/> MTC Alerts Manager	pass987
<input checked="" type="checkbox"/> MTC License	pass987
<input checked="" type="checkbox"/> PO User	pass987

[OK](#) [Cancel](#)

## How to Configure Purchase Manager in your Dynamics 365?

### Company Profile:

- Select the product as **Purchase Manager** in Solutions.
- Click on **Company Profile**.



- 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.

**Profile**  
Company Information

**General**

Company Name:

Phone Number:

Fax:

**Address**

Street1:  City:

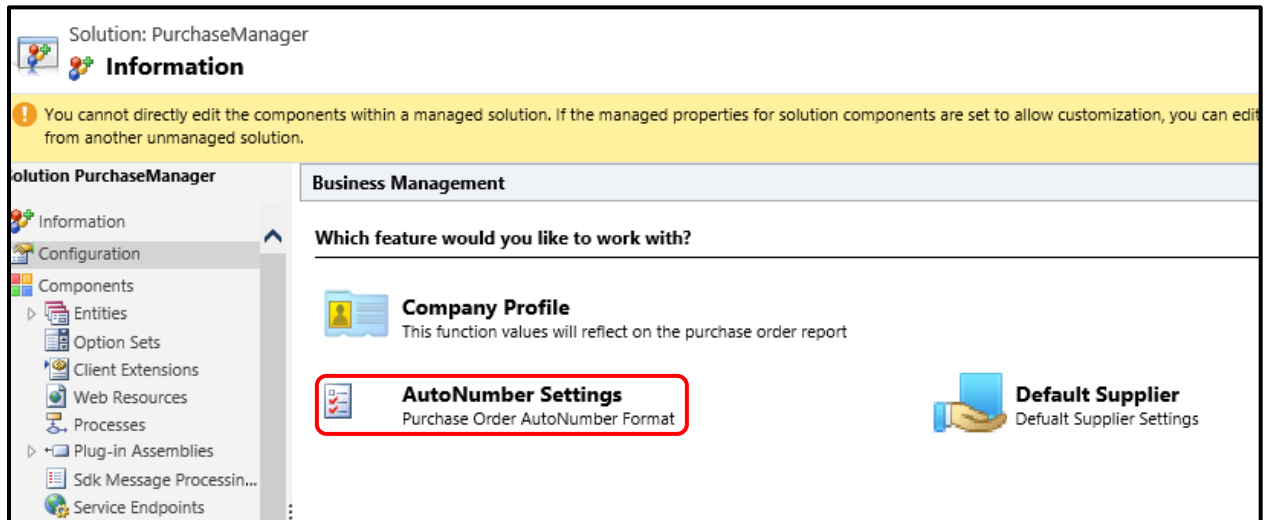
Street2:  State/Province:

Street3:  Country/Region:

ZIP/Postal Code:

## Auto Number Settings:

- Click on Auto Number Settings.



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

### Purchase Order Auto Number Format

Format

Starting From

Home

Submit

Reset

## Default Supplier:

- Click on Default Supplier.

Solution: PurchaseManager

Information

**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 from another unmanaged solution.

Solution PurchaseManager

Information

Configuration

Components

Entities

Option Sets

Client Extensions

Web Resources

Processes


Plug-in Assemblies

Sdk Message Processin...


Service Endpoints

Business Management


Which feature would you like to work with?



**Company Profile**  
 This function values will reflect on the purchase order report



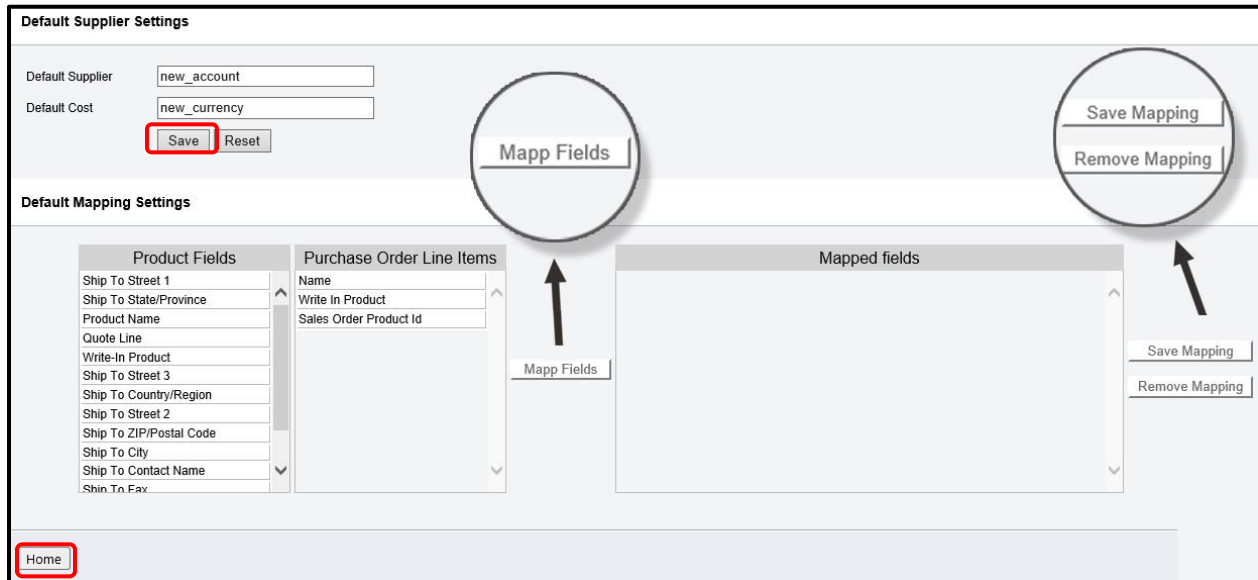
**AutoNumber Settings**  
 Purchase Order AutoNumber Format



**Default Supplier**  
 Default Supplier Settings

- Default Supplier, Default Cost 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.
- If required select Attribute from list of Attributes are available to both Default Supplier and Default Cost, Click on **Save**.



**Default Supplier Settings**

Default Supplier:

Default Cost:

**Default Mapping Settings**

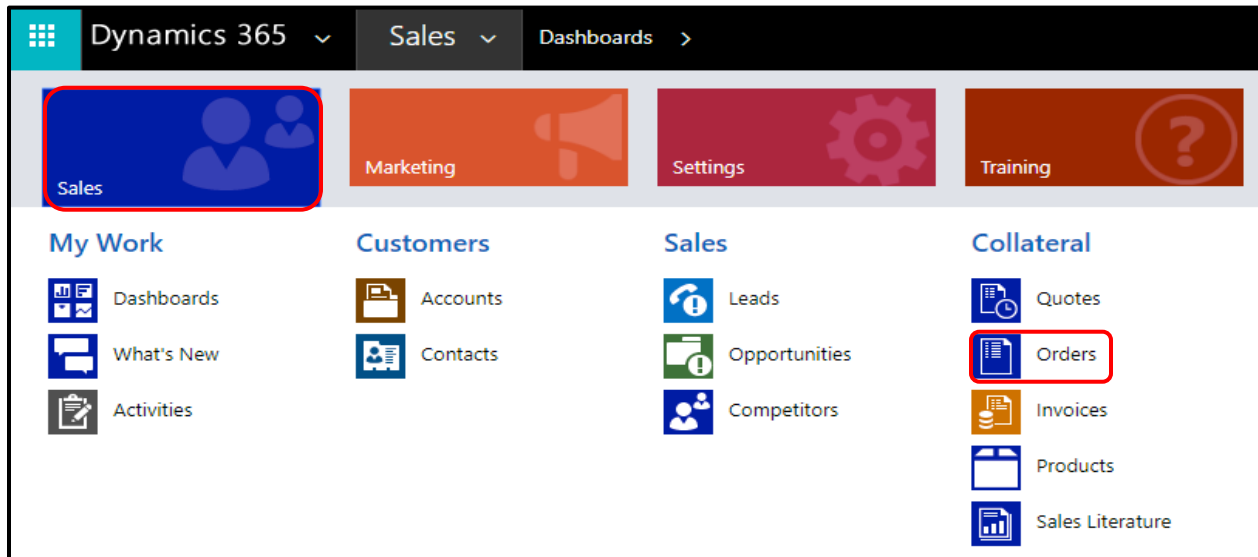
Product Fields	Purchase Order Line Items	Mapped fields
Ship To Street 1	Name	
Ship To State/Province	Write In Product	
Product Name	Sales Order Product Id	
Quote Line		
Write-In Product		
Ship To Street 3		
Ship To Country/Region		
Ship To Street 2		
Ship To ZIP/Postal Code		
Ship To City		
Ship To Contact Name		
Ship To Fax		

- 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.

## Purchase Manager Functionality

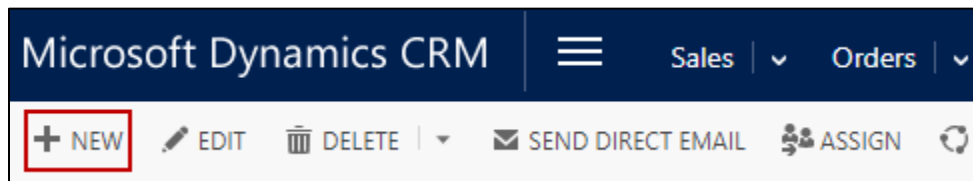
### Step1:

- Navigate to Dynamics 365 → Sales → Orders.



### Step2:

- For creating a New Order, click "+NEW" from ribbon tab. An order form opens up.



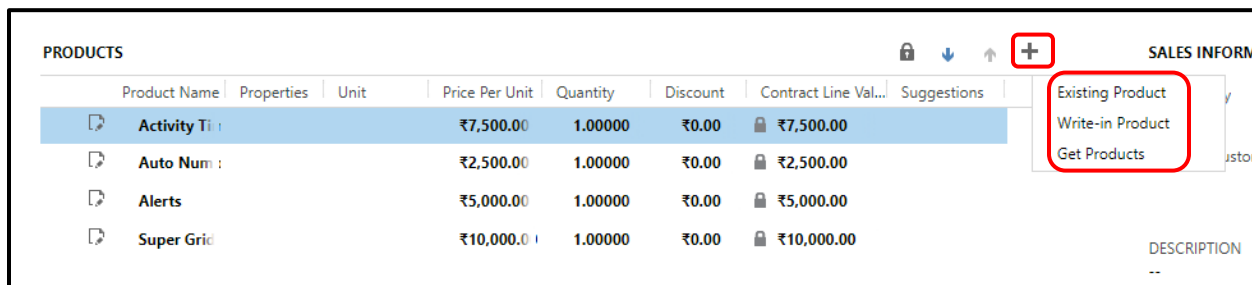
- Fill the required details such as Name, Currency, Price List, Potential Customer and Account.
- Look at the sample order form below with MTC\_Order as order name.

ORDER ▾		MTC_Order		Total Amount	Status	Status Reason
				\$21,900.00	Active	New
Summary						
Order ID	ORD-01010-X2M0P8					
Name	MTC_Order					
Currency	US Dollar					
Price List	Retail					
Prices Locked	No					
PRODUCTS						
Product Name	Properties	Unit	Price Per Unit	Quantity	Discount	Extended Amount
Suggestions						
SALES INFORMATION						
Opportunity	--					
Quote	--					
Potential Customer	Reliance Pvt Ltd					
Account	Reliance Pvt Ltd					

- After filling the required details, **save** the form in order to enable adding product line items.

### Step3:

- Click '+' to add product line items. You can add them from existing product list or by write-in product or by get products. Make your choice and add the product line items.

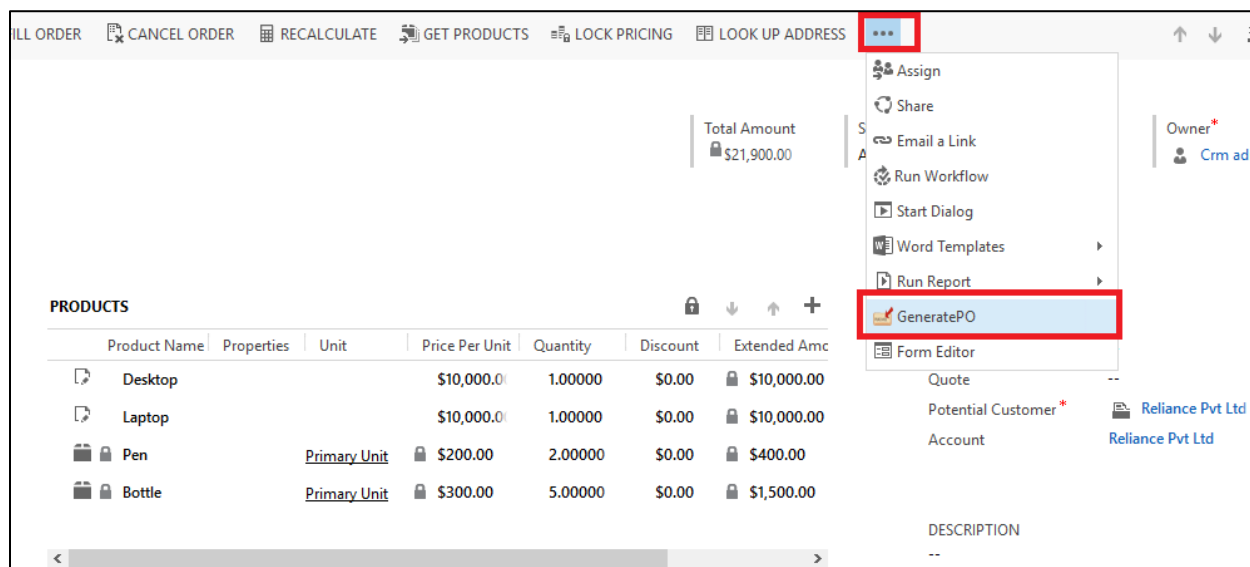


Product Name	Properties	Unit	Price Per Unit	Quantity	Discount	Contract Line Val...	Suggestions
Activity Title			₹7,500.00	1.00000	₹0.00	₹7,500.00	
Auto Number			₹2,500.00	1.00000	₹0.00	₹2,500.00	
Alerts			₹5,000.00	1.00000	₹0.00	₹5,000.00	
Super Grid			₹10,000.00	1.00000	₹0.00	₹10,000.00	

- For Write-in product, add the product name and provide details such as Price Per unit, Quantity, Discount, etc.
- For Existing Product, you can add products with the help of look up.

### Step4:

- After adding the desired products, click **GeneratePO** from **more commands (...)** as shown below.



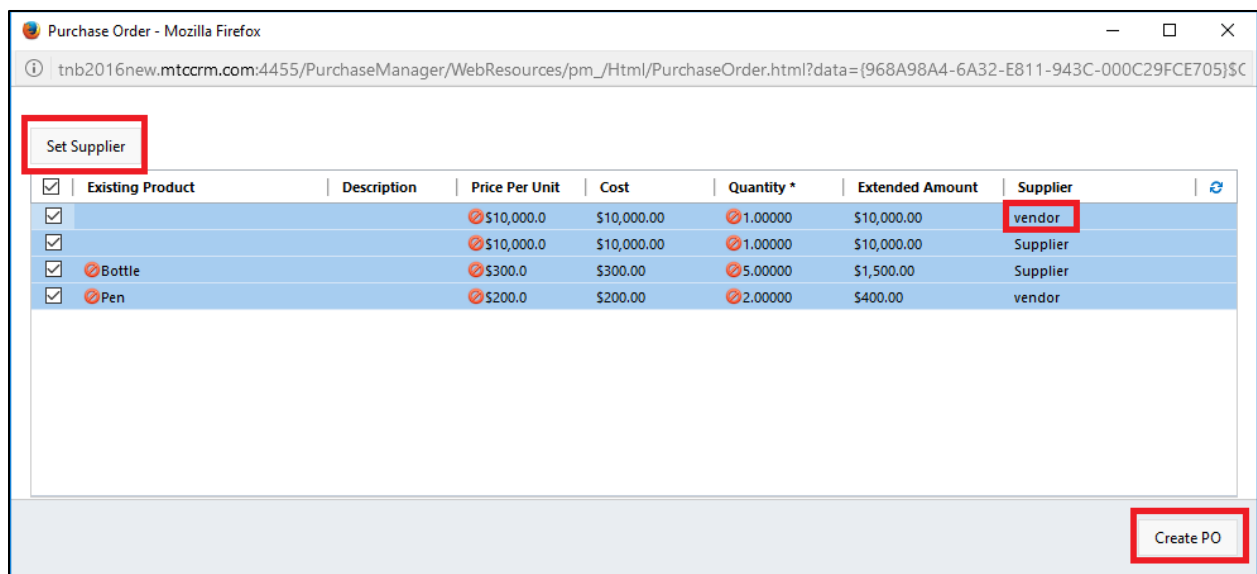
Product Name	Properties	Unit	Price Per Unit	Quantity	Discount	Extended Amc
Desktop			\$10,000.00	1.00000	\$0.00	\$10,000.00
Laptop			\$10,000.00	1.00000	\$0.00	\$10,000.00
Pen		Primary Unit	\$200.00	2.00000	\$0.00	\$400.00
Bottle		Primary Unit	\$300.00	5.00000	\$0.00	\$1,500.00

*Note: You can use GeneratePO only once for a select list of products. GeneratePO becomes non-functional if you try using it for the second time for the same Order ID.*

- Purchase Order window will open. You can set your choicest suppliers for different product line items or select one supplier for all product items. Use Set Supplier option to do this.
- The Set Supplier option will open a look up window where you can select the appropriate supplier.
- You can also select the supplier with the help of Look up icon which is present under Supplier column for each product item.

### Step5:

- Tick the check boxes for the product line items for which you want to create PO and click CreatePO.



<input checked="" type="checkbox"/>	Existing Product	Description	Price Per Unit	Cost	Quantity *	Extended Amount	Supplier
<input checked="" type="checkbox"/>			\$10,000.0	\$10,000.00	1.00000	\$10,000.00	vendor
<input checked="" type="checkbox"/>			\$10,000.0	\$10,000.00	1.00000	\$10,000.00	Supplier
<input checked="" type="checkbox"/>	Bottle		\$300.0	\$300.00	5.00000	\$1,500.00	Supplier
<input checked="" type="checkbox"/>	Pen		\$200.0	\$200.00	2.00000	\$400.00	vendor

- Respective Purchase Order will be created and shown in a separate window.
- Every Purchase Order name will be created Prefix as PO – Order Name – Supplier Name as per defined in the configuration page.
- Purchase order is created based on the supplier. For example, if 3 orders have the same supplier then purchase order will be created as 1 with order list of 3 products.



Purchase Order - Mozilla Firefox

tnb2016new.mtccrm.com:4455/PurchaseManager/WebResources/pm/\_Html/PurchaseOrder.html?data={968A98A4-6A32-E811-943C-000

Name	Created On
PO - vendor	28-03-2018 03:20
PO - Supplier	28-03-2018 03:20

- All details such as Subtotal, Shipping, P/O discount, Ship via, Tax, Desired ship date and Total amount will be reflected in the respective fields of Purchase Order Report as shown below.
- Also, all the Notes and Attachments at the Order form will be carried forward to Purchase Order form.

Microsoft Dynamics CRM PO - vendor

CrM admin PurchaseManager

PURCHASE ORDER : INFORMATION

PO - vendor

Purchase Order

P/O Title \* PO - vendor Sales Order Title MTC\_Order

Supplier vendor Sales Order # ORD-01010-X2M0P8

Purchase Order # PORD-0007 Account Reliance Pvt Ltd Modified On 3/28/2018 3:53 PM

Purchase RFO -- Created By CrM admin

Product Type	Product	Write In Produ...	Cost	TaxRate	Quantity	Sub Total	Tax	Total
Existing			\$10,000.00	5.00	1.00	\$10,000.00	\$500.00	\$10
Existing			\$10,000.00	5.00	1.00	\$10,000.00	\$500.00	\$10
Existing	Bottle		\$300.00	5.00	5.00	\$1,500.00	\$75.00	\$1

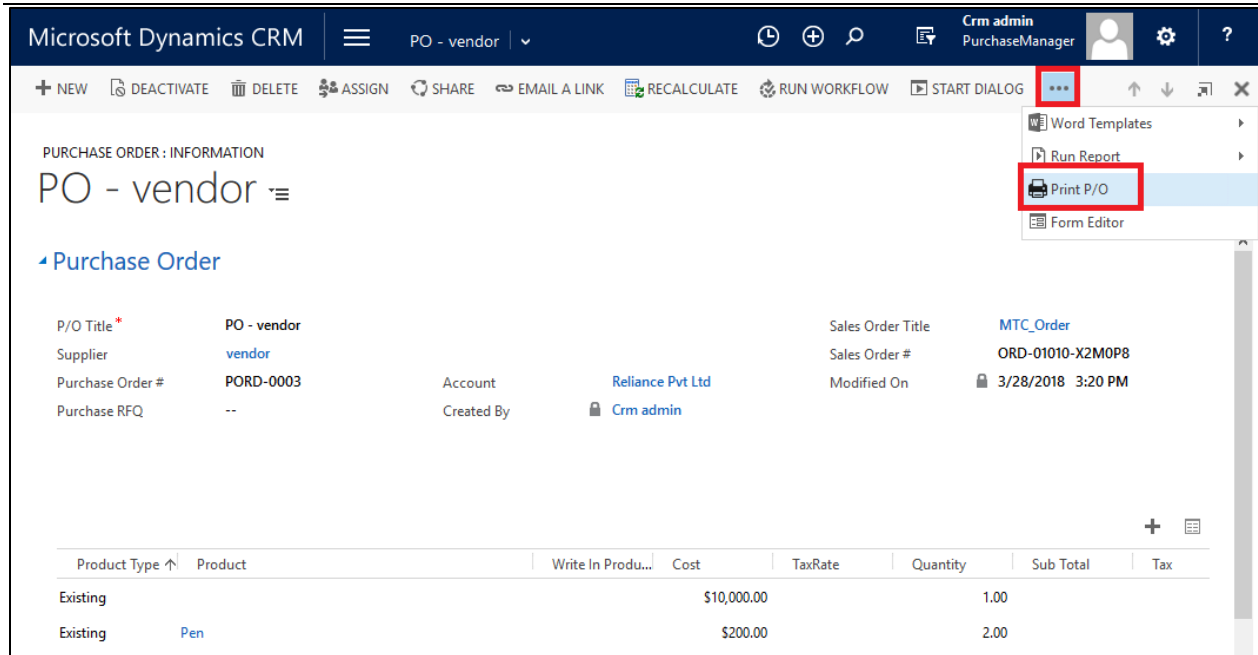
Sub Total	\$21,500.00	P/O Discount	\$10.00	Tax(%)	5.00		
Shipping	\$80.00	Ship Via	Postal Mail	Desired Ship Date	4/2/2018	Total Amount	\$22,645.00

Status Active

Active

## Step6:

- Click **Print P/O** from more commands (...) as shown below.



Microsoft Dynamics CRM | PO - vendor | Crm admin | PurchaseManager

NEW | DEACTIVATE | DELETE | ASSIGN | SHARE | EMAIL A LINK | RECALCULATE | RUN WORKFLOW | START DIALOG | ...

Word Templates | Run Report | **Print P/O** | Form Editor

PURCHASE ORDER : INFORMATION  
 PO - vendor

Purchase Order

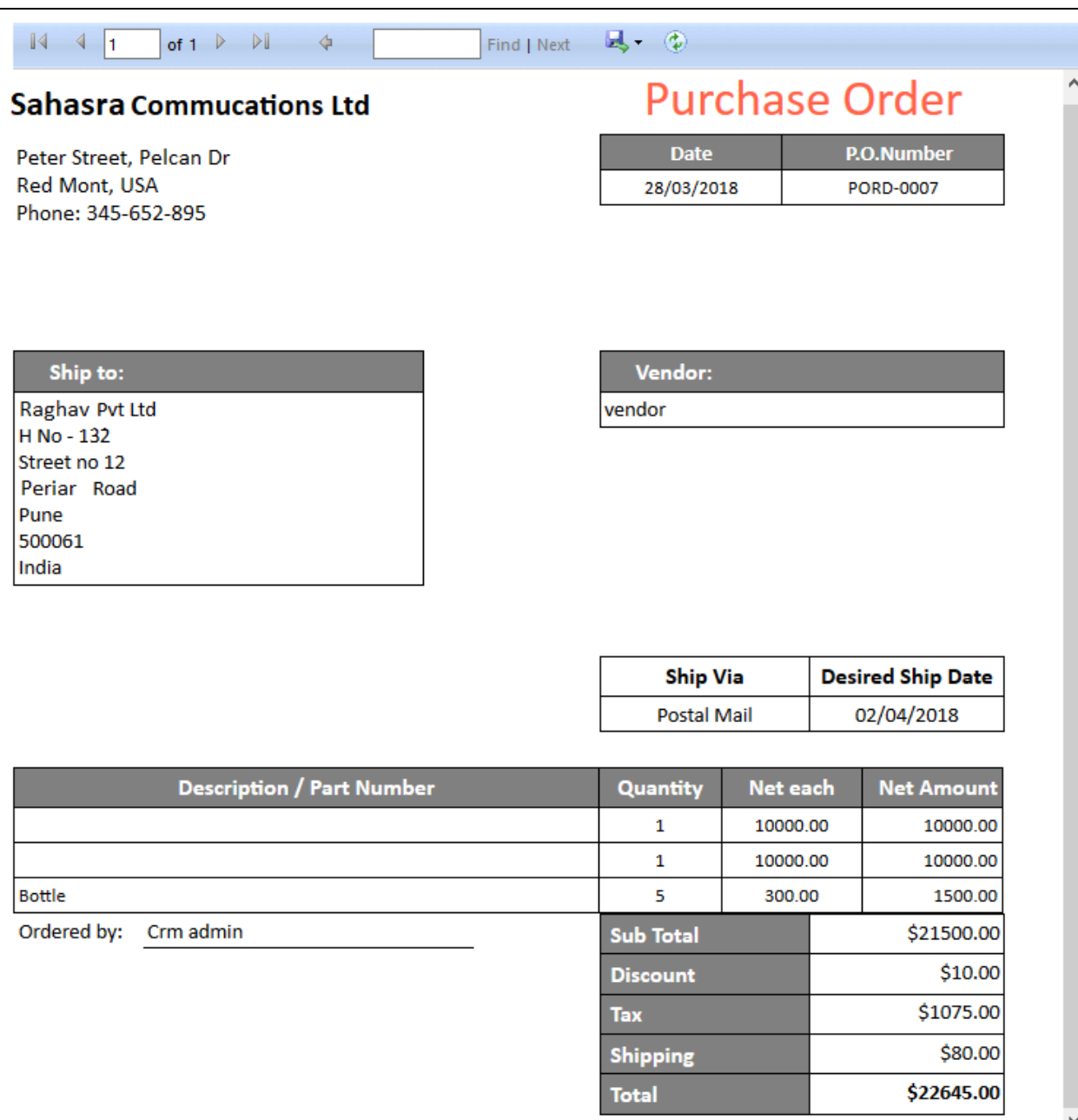
P/O Title \* PO - vendor  
 Supplier vendor  
 Purchase Order # PORD-0003  
 Purchase RFQ --

Account Reliance Pvt Ltd  
 Created By Crm admin

Sales Order Title MTC\_Order  
 Sales Order # ORD-01010-X2M0P8  
 Modified On 3/28/2018 3:20 PM

Product Type	Product	Write In Produ...	Cost	TaxRate	Quantity	Sub Total	Tax
Existing			\$10,000.00		1.00		
Existing	Pen		\$200.00		2.00		

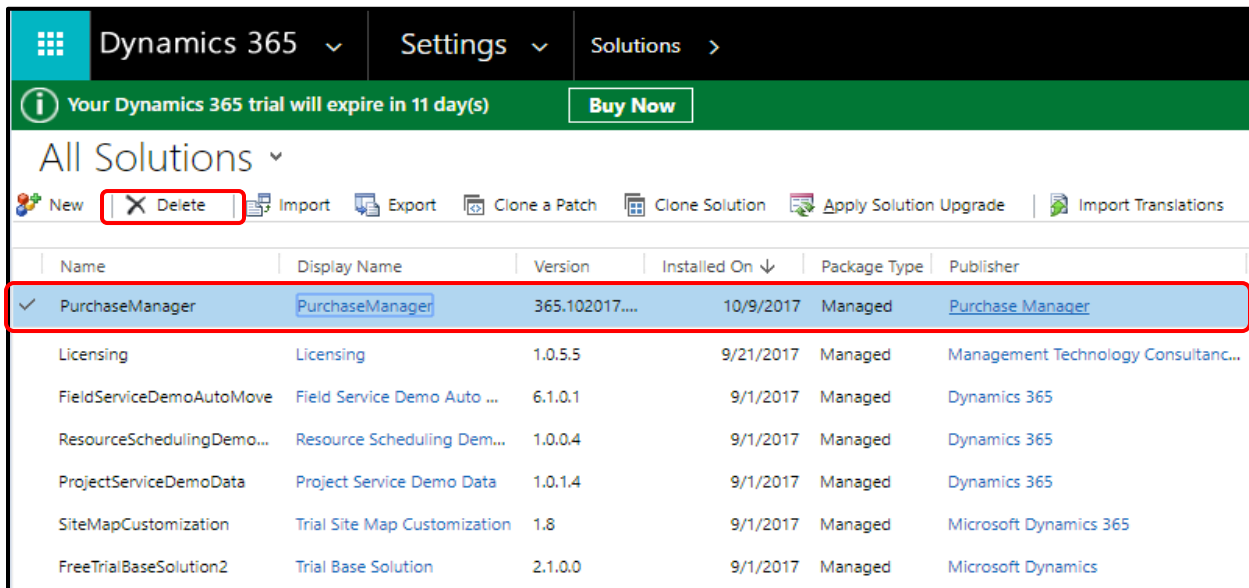
- A Purchase Order report is generated as shown below. You save this report as PDF for further use.



## How to Uninstall Purchase Manager in your Dynamics 365?

### Step1:

- Navigate to Dynamics 365 → Settings → Solutions.
- Click on **Purchase Manager Solution** and click on **Delete**.

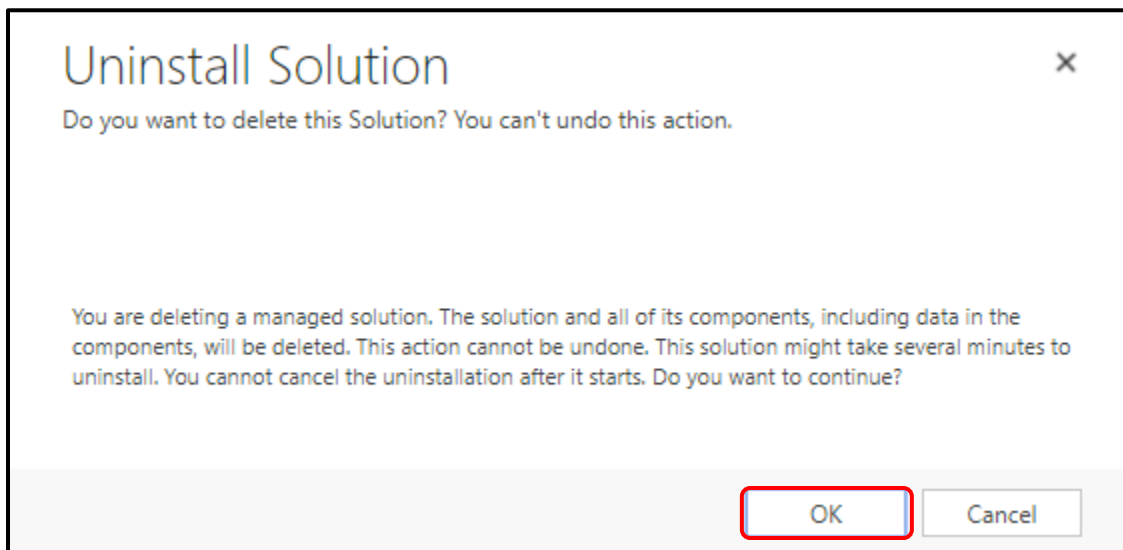


The screenshot shows the Dynamics 365 interface. The top navigation bar includes 'Dynamics 365', 'Settings', and 'Solutions'. A green banner at the top indicates 'Your Dynamics 365 trial will expire in 11 day(s)' with a 'Buy Now' button. Below this, the 'All Solutions' section is visible. A toolbar contains buttons for 'New', 'Delete' (highlighted with a red box), 'Import', 'Export', 'Clone a Patch', 'Clone Solution', 'Apply Solution Upgrade', and 'Import Translations'. A table lists installed solutions. The first row, 'PurchaseManager', is highlighted with a red box. The table columns are: Name, Display Name, Version, Installed On, Package Type, and Publisher.

Name	Display Name	Version	Installed On	Package Type	Publisher
✓ PurchaseManager	PurchaseManager	365.102017....	10/9/2017	Managed	Purchase Manager
Licensing	Licensing	1.0.5.5	9/21/2017	Managed	Management Technology Consultanc...
FieldServiceDemoAutoMove	Field Service Demo Auto ...	6.1.0.1	9/1/2017	Managed	Dynamics 365
ResourceSchedulingDemo...	Resource Scheduling Dem...	1.0.0.4	9/1/2017	Managed	Dynamics 365
ProjectServiceDemoData	Project Service Demo Data	1.0.1.4	9/1/2017	Managed	Dynamics 365
SiteMapCustomization	Trial Site Map Customization	1.8	9/1/2017	Managed	Microsoft Dynamics 365
FreeTrialBaseSolution2	Trial Base Solution	2.1.0.0	9/1/2017	Managed	Microsoft Dynamics

### Step2:

- Click on **OK** to delete the Purchase Manager Solution.



The screenshot shows a 'Uninstall Solution' dialog box. The title is 'Uninstall Solution' with a close button (X) in the top right corner. The text inside reads: 'Do you want to delete this Solution? You can't undo this action.' Below this, a warning message states: 'You are deleting a managed solution. The solution and all of its components, including data in the components, will be deleted. This action cannot be undone. This solution might take several minutes to uninstall. You cannot cancel the uninstallation after it starts. Do you want to continue?' At the bottom right, there are two buttons: 'OK' (highlighted with a red box) and 'Cancel'.