User Guide

Sales Product Editor

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Solution Version: 365_072017_3_4
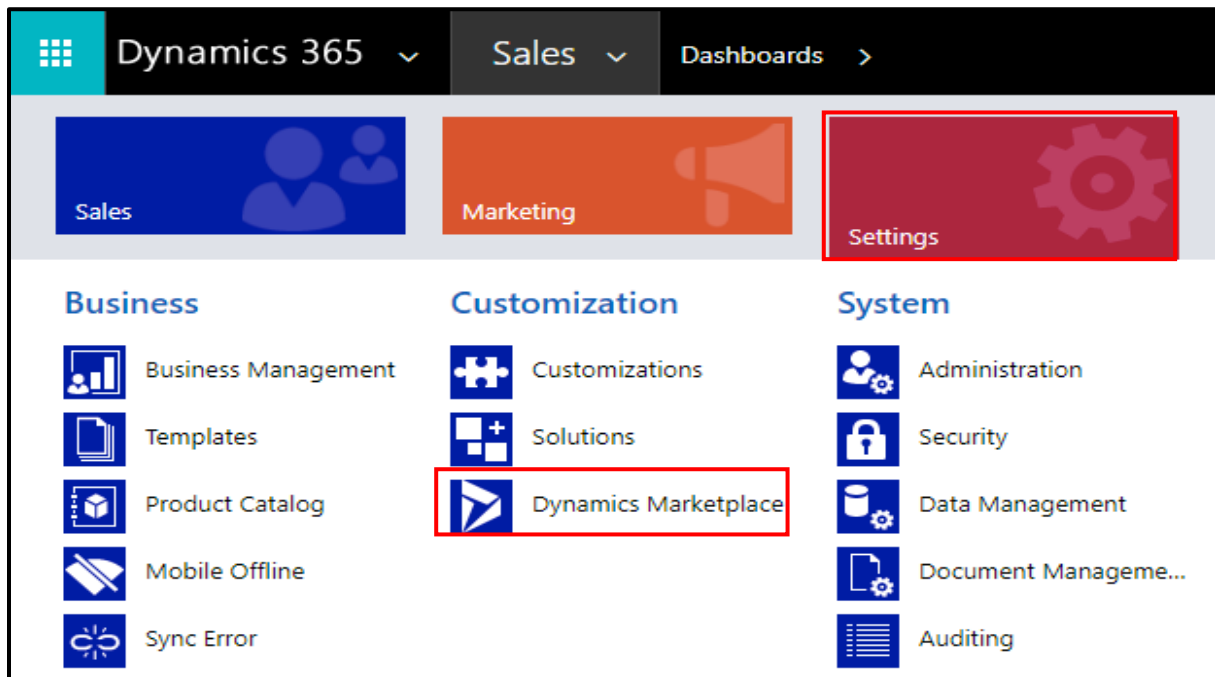
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Sales Product Editor

How to Install Sales Product Editor in your Dynamics 365?

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

Step1:

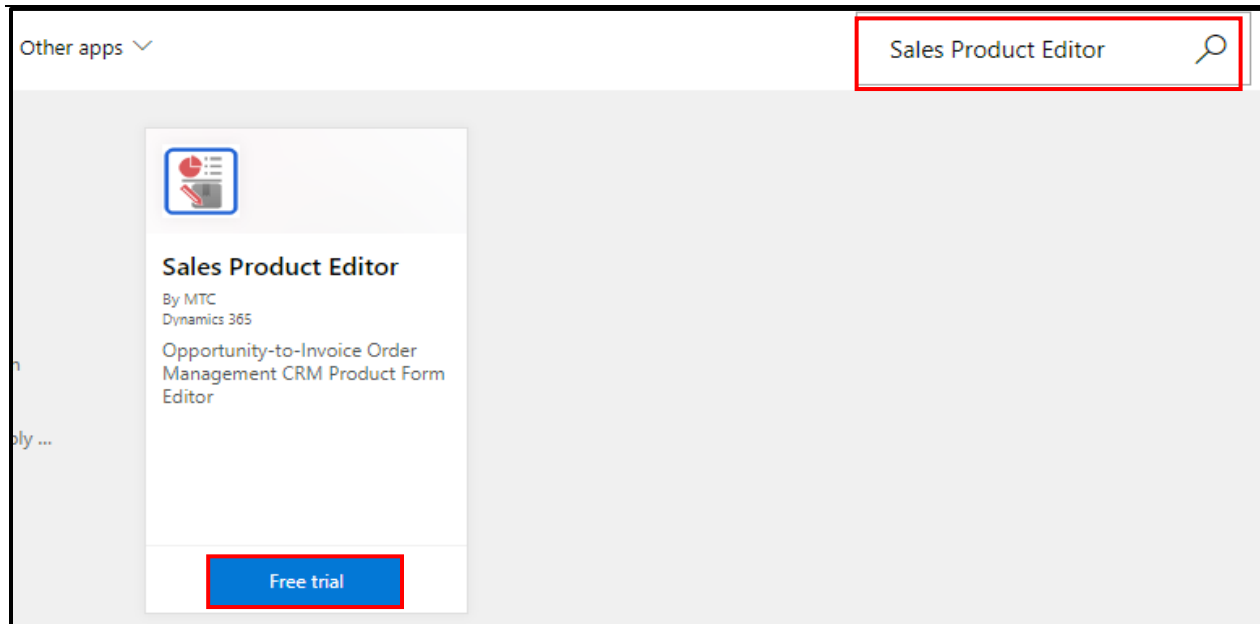➢ Navigate to **Dynamics 365** ➔ **Settings** ➔**Dynamics Marketplace.**

Step2:

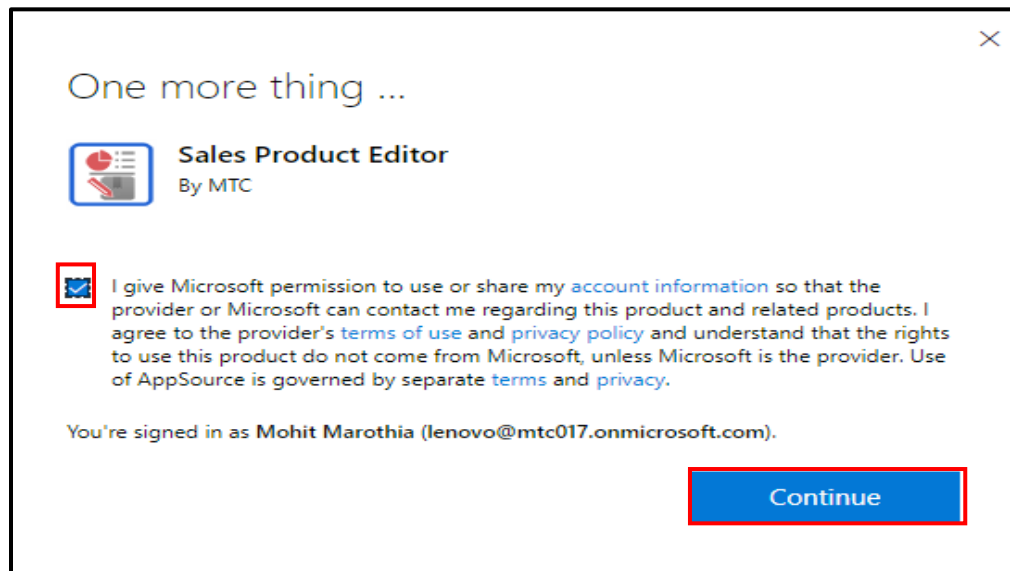➢ In the search box, search for **Sales Product Editor** by MTC and click on **free trial.**

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Step3:

➢ Please tick the Check Box to give permissions and click on **Continue.**

Step4:

➢ Please 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.

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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 (orgd1ffbbb4) ▼

☑ Agree to Microsoft's Legal Terms and Privacy Statement

☑ Agree to Privacy Statement and Legal Terms for importing solutions into Dynamics 365

Agree | **Cancel**

➢ After clicking on Agree the Installation Process Begins.
➢ After completing the installation, you will notice that licensing solution also installed along with Sales Product Editor Solution.

Step5:

➢ To get the free trial Click on licensing solution.

SalesProductEditor	SalesProductEditor	365.072017....	10/25/2017	Managed	Management Technology Consultanc...
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
SkylineEducationSeries	OneWorldSIS	8.2.1.172109	9/22/2017	Managed	OneWorldSIS

➢ You will be redirected to Account Registration window.

Step6:

➢ Please fill up the **Account Information** and click **"Submit." "This will be a onetime activity."**

LICENSE INFORMATION

First Name*
Mohit

Last Name*
Marothia

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1234567892

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Email*
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City*
hyderabad

State/Province*
ts

Country*
india

Zip/Postal Code*
500050

Submit

➢ The account registration window refreshes and loads up with MTC products just below the account details.

➢ You can notice **Sales Product Editor** status as **Installed**.

Notes Rollup			Get it Now
Sales Product Editor			Installed
Resource Calendar			Get it Now
Spell Checker			Get it Now
SpellChecker-OnPremise			Get it Now
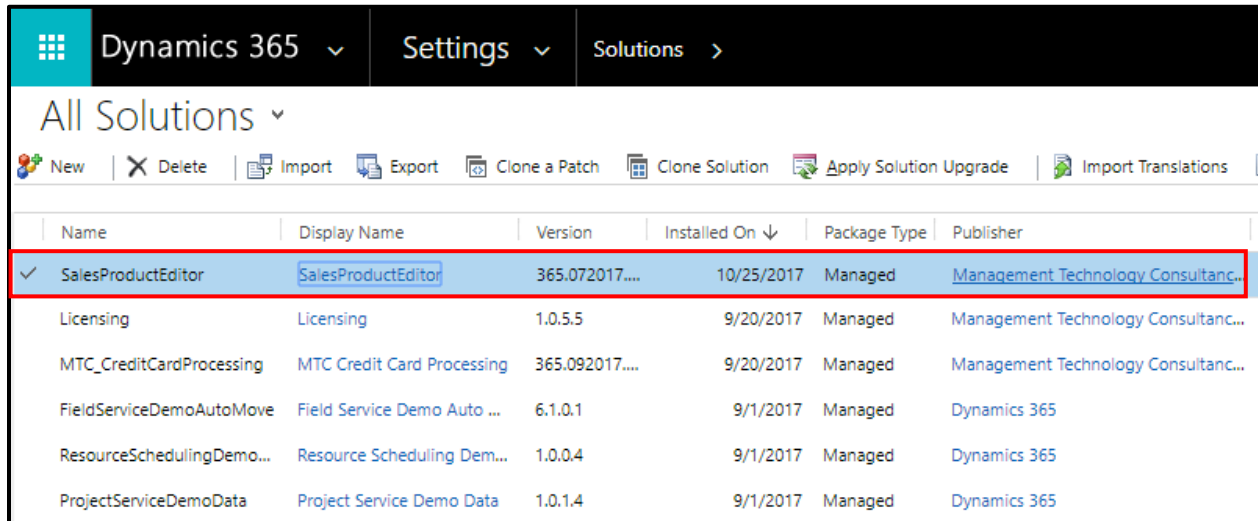
Note: The free trial license key is generated and activated on the first use of the product.

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How to Configure Sales Product Editor in your Dynamics 365?

Step1:

➢ Navigate to **Dynamics 365** → **Settings** → **Solutions.**

➢ Click on **Sales Product Editor** solution.

➢ A new window appears with Sales Product Editor Settings.

Step2:

➢ Click on **Sales Product Editor Settings**. You will be redirected to Sales Product Editor Settings page.

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- ➢ Sales Product Editor Settings can be done on Four Entities.
  - Opportunity Product
  - Quote Product
  - Order Product
  - Invoice Product
- ➢ For example, let's find out how Sales Product Editor works on **Opportunity Product entity**.

Step3:

- ➢ Click on the **drop-down arrow** to get all the four entity on your screen.
- ➢ **Quick Product Search –** It helps to search the existing product in your CRM.
- ➢ **Enable Sorting –** It helps to arrange the columns.
- ➢ From **Select CRM Form** choose any form from the drop down list on which you want to have the Settings.
- ➢ For Example, I have selected **Opportunity** in the form.
- ➢ In **Select CRM Tab**, select a tab where you want to apply the grid of Sales Product Editor.
- ➢ To add the fields into the Opportunity product editor grid select the fields in CRM Fields as per you requirement and Click on forward arrow →as shown below.
- ➢ The selected CRM fields will be added to the product editor grid and then click "**Save.**"

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➢ A popup message appears as **Columns added successfully.**

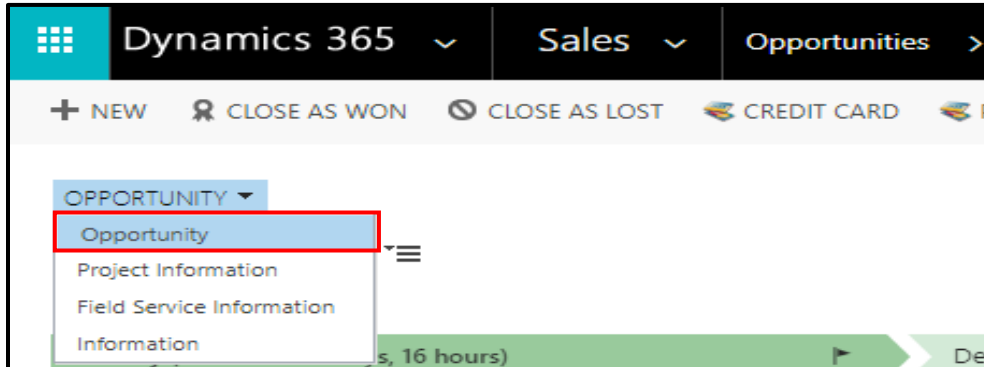Copyright © 2017 Management Technology Consulting LLC
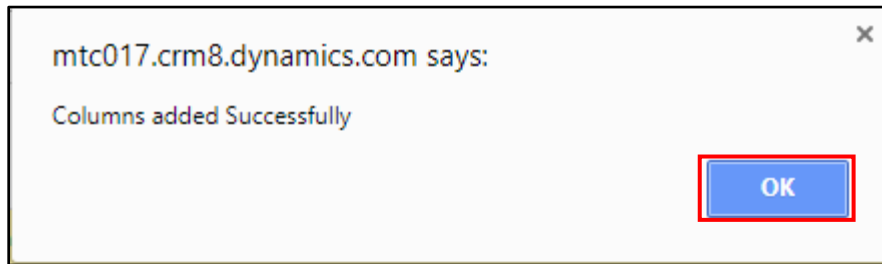
Sales Product Editor Functionality

Step1:

➢ Navigate to **Dynamics 365** → **Sales** → **Opportunity.**

➢ Select any existing opportunity as per your requirements.

➢ Select CRM form as **Opportunity** as per the settings done in configurations.

➢ You can see that two grids named as **Quick Product Search and Add** and **Product Editor** is displayed below the **Summary tab** as per the settings done in configuration page.
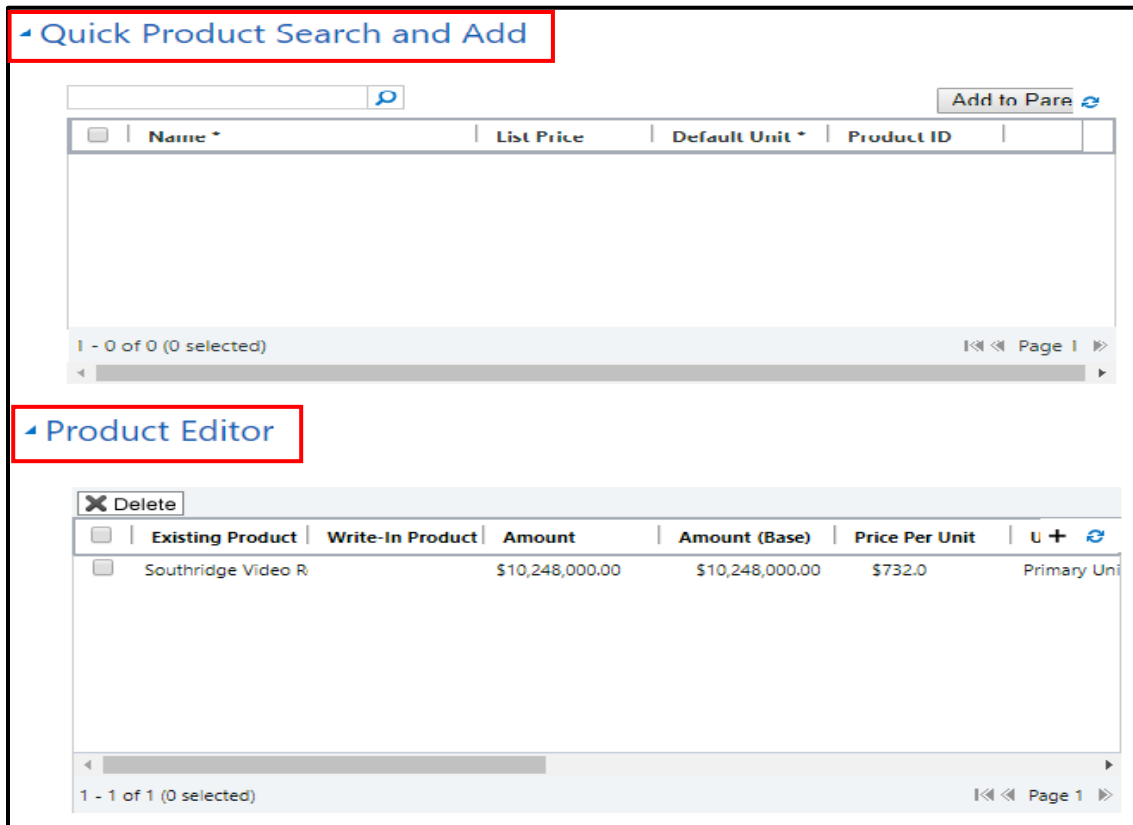
Step2:

➢ In **Quick Product Search and Add** we can get all the existing products available in CRM.
➢ Provide a key word in the search box and click on **search icon** to get the relevant products.
➢ Now select single or multiple product(s) as per your wish and click on **Add to Parent** to add that product in **Product Editor** Grid automatically.

➢ You can see that the selected products have been added to Product Editor Grid.

Step3:

➢ Click **"Save."**

> ➢ You can add as many products as you want by a simply clicking on "+" symbol.

Step4:

> ➢ Click on any field in the product row to edit as per your requirement.

Step5:

> ➢ Under **Select Product,** select **Write-In** to add your own product.
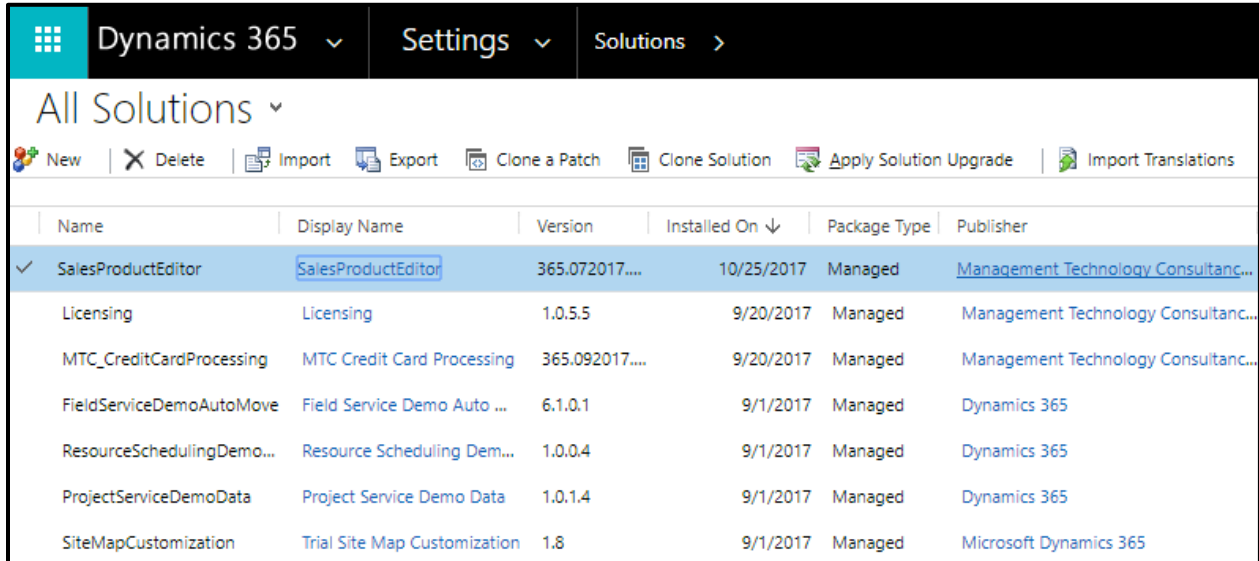
➤ Finally, click **Save icon**.

How to Uninstall Sales Product Editor in your Dynamics 365?

Step1:

> ➢ Navigate to **Dynamics 365 → Sales → Settings → Solutions.**
> ➢ Select **SalesProductEditor** and click on **Delete** to uninstall the solution.

Step2:

> ➢ Click on ok to start the uninstalling process of the solution.

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