

# User Guide



## Sales Product Editor

*Document Version: 1.0*

*Solution Version: 365\_072017\_3\_4*



---

## Table of Contents

How to Install Sales Product Editor in your Dynamics 365? .....	3
How to Configure Sales Product Editor in your Dynamics 365? .....	7
Sales Product Editor Functionality .....	10
How to Uninstall Sales Product Editor in your Dynamics 365?.....	14

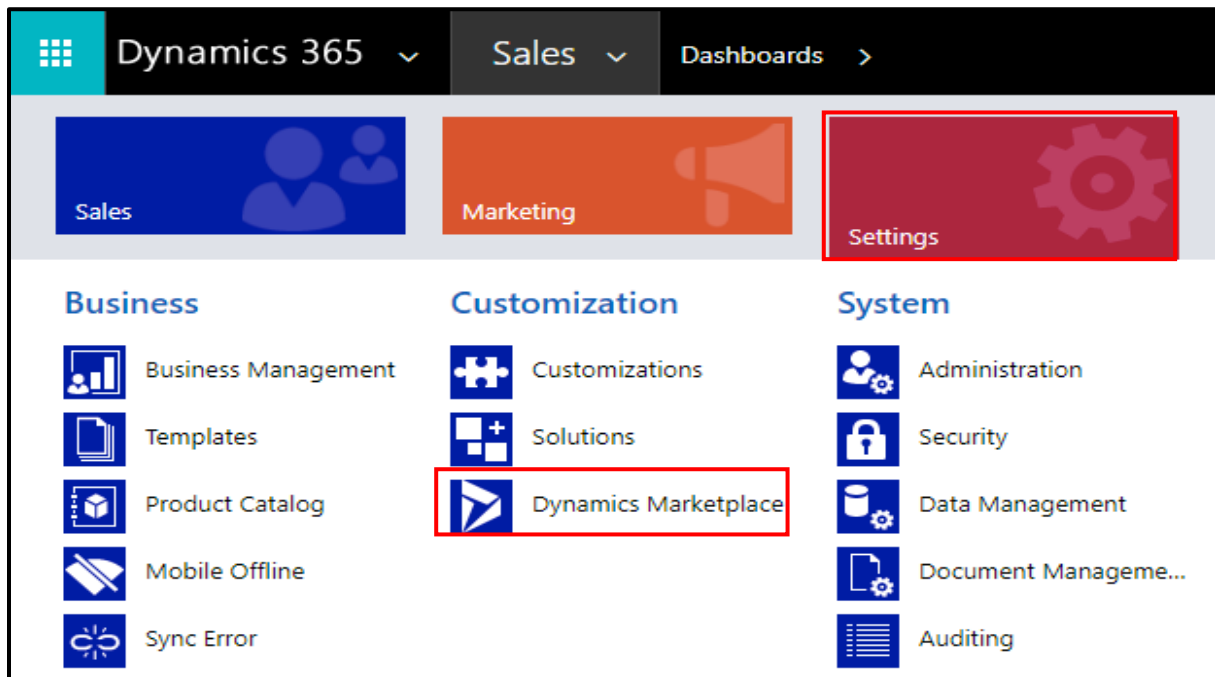


## How to Install Sales Product Editor in your Dynamics 365?

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**.

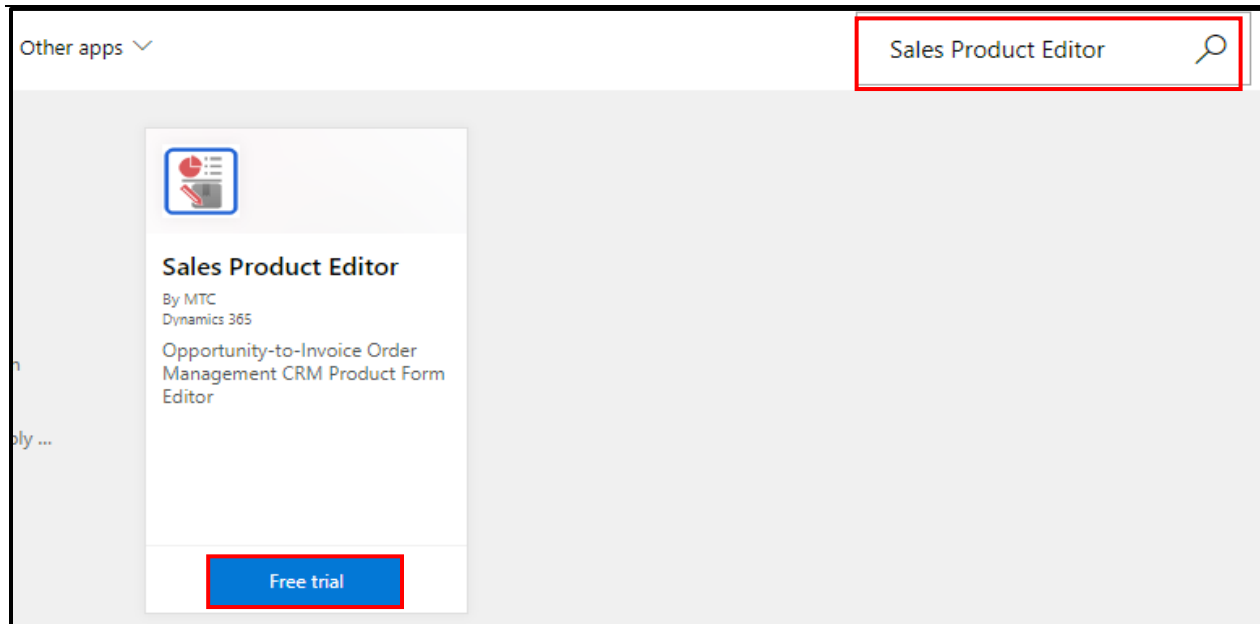


### Step2:

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

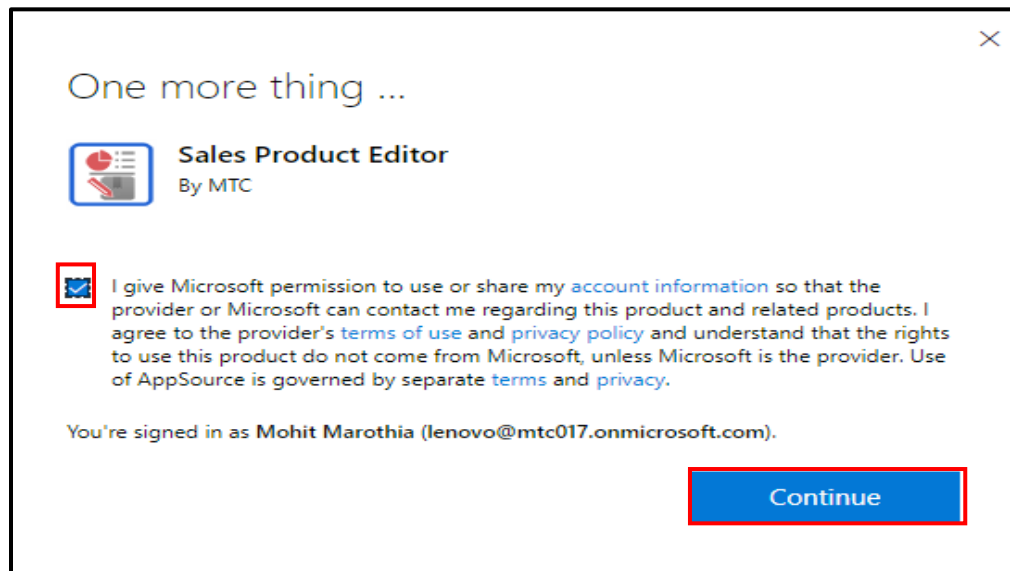


## Sales Product Editor



### 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.



### 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

- 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...
<input checked="" type="checkbox"/> 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
OnlineEducationSeries	Online Education Series	8.2.1.172109	9/22/2017	Managed	Online Education Series

- You will be redirected to Account Registration window.

#### Step6:

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



## Sales Product Editor

LICENSE INFORMATION	
First Name*	Last Name*
<input type="text" value="Mohit"/>	<input type="text" value="Marothia"/>
Phone*	Company*
<input type="text" value="1234567892"/>	<input type="text" value="www.mtccrm.com"/>
Website*	Email*
<input type="text" value="mtccrm.com"/>	<input type="text" value="mohit@mtccrm.com"/>
City*	State/Province*
<input type="text" value="hyderabad"/>	<input type="text" value="ts"/>
Country*	Zip/Postal Code*
<input type="text" value="india"/>	<input type="text" value="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 **Sales Product Editor** status as **Installed**.

Notes Rollup			<a href="#">Get it Now</a>
Sales Product Editor			Installed
Resource Calendar			<a href="#">Get it Now</a>
Spell Checker			<a href="#">Get it Now</a>
SpellChecker-OnPremise			<a href="#">Get it Now</a>

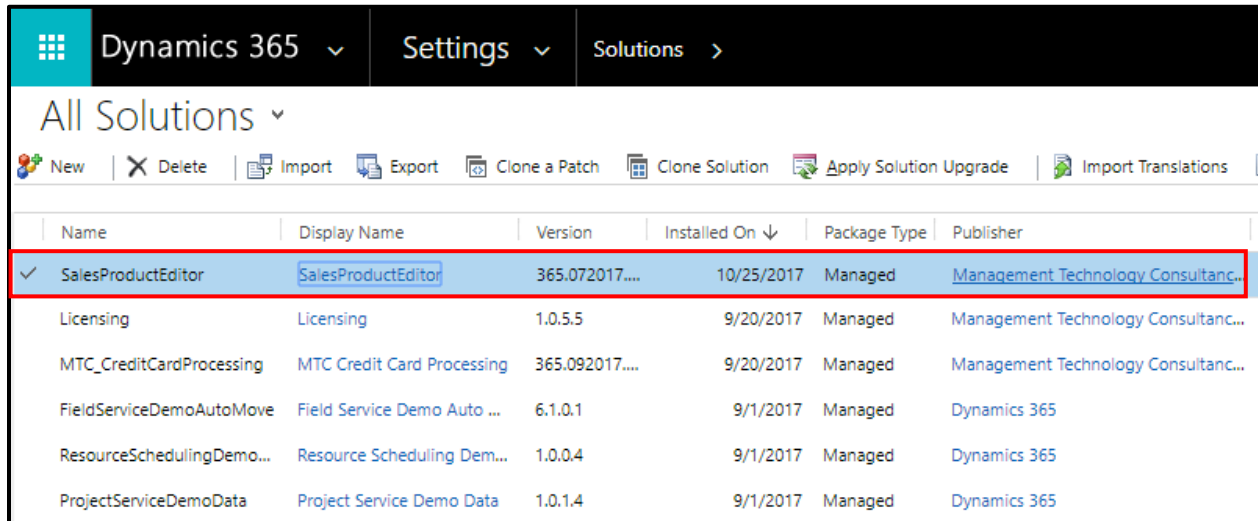
**Note:** The free trial license key is generated and activated on the first use of the product.



## How to Configure Sales Product Editor in your Dynamics 365?

### Step1:

- Navigate to Dynamics 365 → Settings → Solutions.
- Click on Sales Product Editor solution.



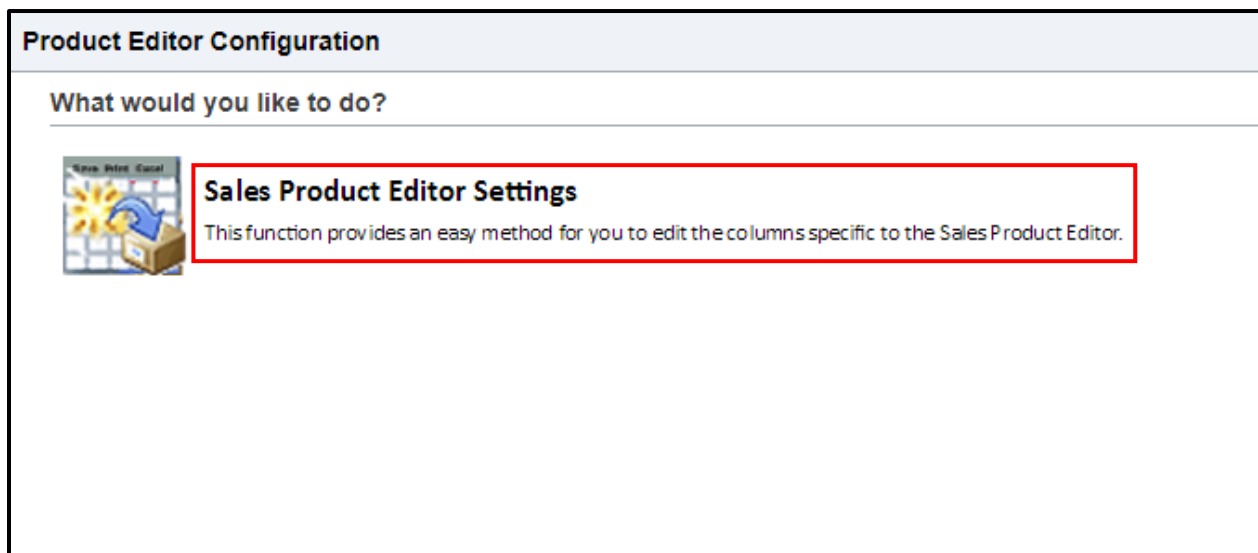
The screenshot shows the Dynamics 365 interface with the 'Solutions' tab selected. A table lists various solutions, with 'SalesProductEditor' highlighted by a red box. The table has columns for Name, Display Name, Version, Installed On, Package Type, and Publisher.

Name	Display Name	Version	Installed On	Package Type	Publisher
✓ 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

- 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.



The screenshot shows the 'Product Editor Configuration' page. It has a heading 'What would you like to do?' and a button labeled 'Sales Product Editor Settings' which is highlighted by a red box. Below the button, there is a description: 'This function provides an easy method for you to edit the columns specific to the Sales Product Editor.'



- 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.**”

**Sales Product Editor Settings**

**Select Entity:**  

Opportunity Product

Choose the Columns to Appear in the Editor for the Quote Form  
  
 Opportunity Form  
 Order Form  
 Invoice Form  
☒ Quick Product Search  
☒ Enable Sorting

**Selected CRM Form**  

Opportunity

**Selected CRM Tab**  

Summary

**CRM Fields**

Billing Method  
 Budget Amount  
 Budget Amount (Base)  
 Bundle Item Association  
 Cost Amount (Base)  
 Cost Price Per Unit  
 Cost Price Per Unit (Base)  
 Created By  
 Created By (Delegate)  
 Created On  
 Currency  
 Description  
 End Date  
 Exchange Rate  
 Extended Amount (Base)  
 Import Sequence Number  
 Line Item Number  
 Manual Discount Amount  
 Manual Discount Amount (Base)  
 Modified By  
 Modified By (Delegate)  
 Modified On  
 Opportunity  
 Parent Bundle  
 Price List

→  
 ←

**Selected CRM Fields**

	Width (px)
Existing Product	100 ▾
Write-In Product	100 ▾
Amount	100 ▾
Amount (Base)	100 ▾
Price Per Unit	100 ▾
Unit	100 ▾
Select Product	100 ▾
Price Overridden	100 ▾
Opportunity Product	100 ▾
Line Type	100 ▾
Quantity	100 ▾
Opportunity Line Amount	100 ▾
Duration	100 ▾
Cost Amount	100 ▾

↑

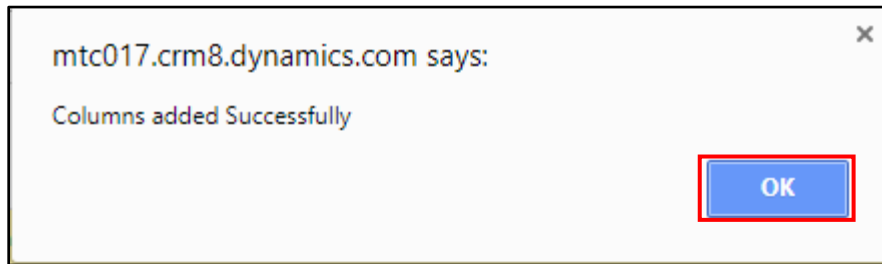
↓

Save





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

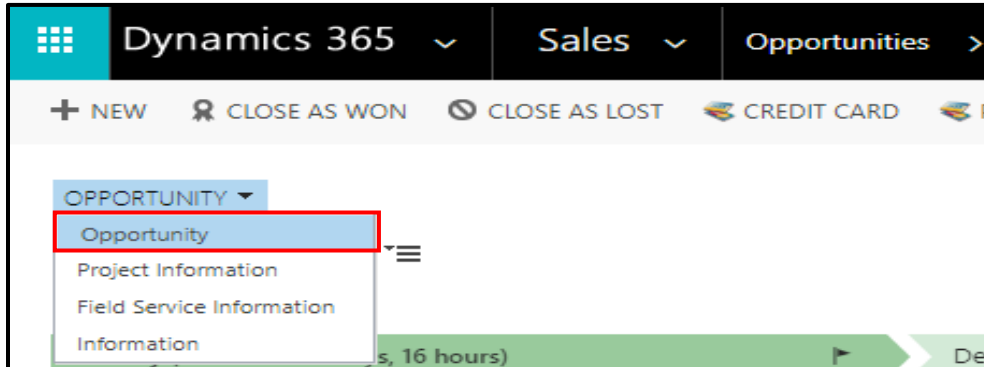




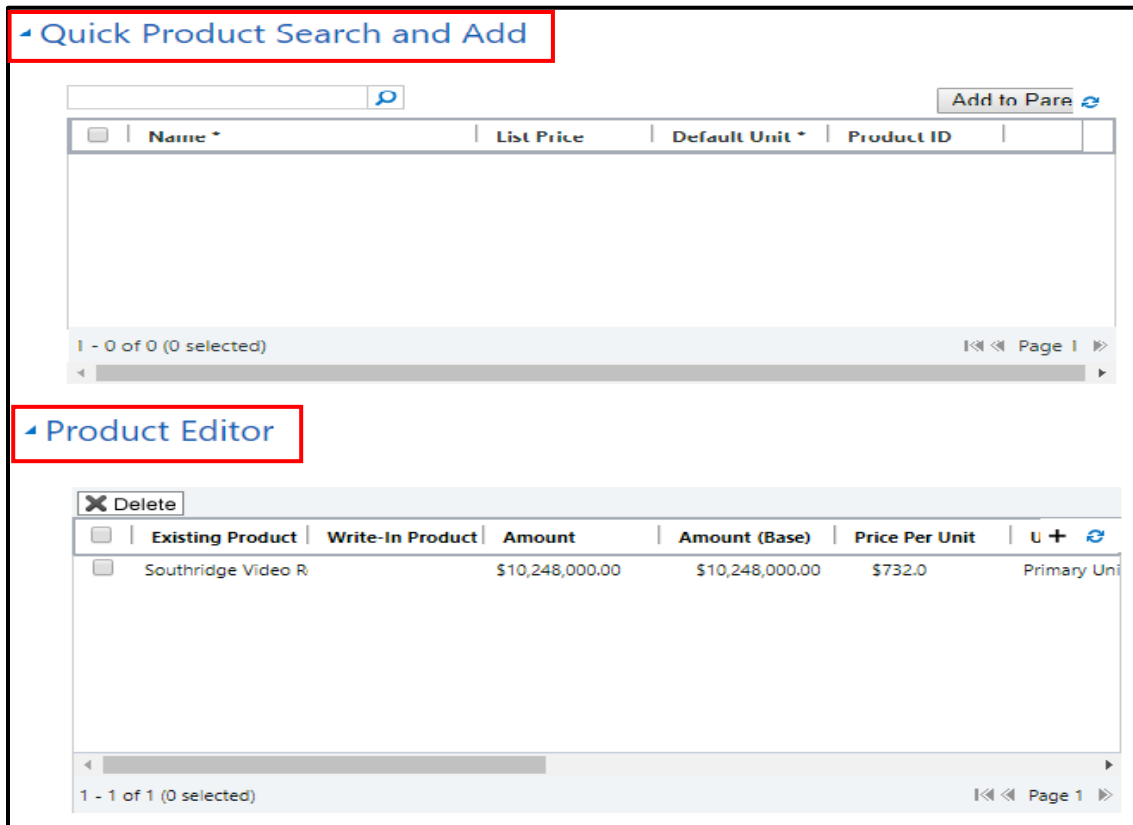
## Sales Product Editor Functionality

### 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.

### Quick Product Search and Add

<input type="checkbox"/>	Name *	List Price	Default Unit *	Product ID
<input checked="" type="checkbox"/>	Carbon Fiber 3D Printer 20"			3DPCF001
<input checked="" type="checkbox"/>	Carbon Fiber 3D Printer 15"			3DPCF0015
<input checked="" type="checkbox"/>	ABS Filament 3D Printer 4"			3DPF022
<input type="checkbox"/>	FDM Filament 3D Printer 10"			3DPF078
<input type="checkbox"/>	WWI Laptop15 M0150			5637146291
<input type="checkbox"/>	WWI Laptop12 M0120			5637146294

1-34 of 34( 3 selected) I<< Page 1 >>



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

## Step3:

- Click "Save."



Product Editor

X Delete						
<input type="checkbox"/>		Existing Product	Write-In Product	Amount	Amount (Base)	Price Per Unit + 
<input checked="" type="checkbox"/>	X	ABS Filament 3D Pri				\$500.0 Primary
<input checked="" type="checkbox"/>	X	Carbon Fiber 3D Pri				\$8,000.0 Primary
<input checked="" type="checkbox"/>	X	Carbon Fiber 3D Pri				\$15,000.0 Primary
<input type="checkbox"/>		Southridge Video R		\$10,248,000.00	\$10,248,000.00	\$732.0 Primary


1-4 of 4( 3 selected) Page 1

- You can add as many products as you want by simply clicking on “+” symbol.

#### Step4:

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

Product Editor

X Delete						
<input type="checkbox"/>		Existing Product	Write-In Product	Amount	Amount (Base)	Price Per Unit U + 
<input checked="" type="checkbox"/>		ABS Filament 3D Pri		\$ 500.00	\$500.00	\$500.0 Primary Uni
<input type="checkbox"/>		Carbon Fiber 3D Pri		\$8,000.00	\$8,000.00	\$8,000.0 Primary Uni
<input type="checkbox"/>		Carbon Fiber 3D Pri		\$15,000.00	\$15,000.00	\$15,000.0 Primary Uni
<input type="checkbox"/>		Southridge Video R		\$10,248,000.00	\$10,248,000.00	\$732.0 Primary Uni

#### Step5:

- Under **Select Product**, select **Write-In** to add your own product.



Product Editor

☐ Delete

<input type="checkbox"/>	<input type="checkbox"/>	Select Product	Existing Product	Write-In Product	Amount	Amount (Base) +
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Write-In		<input type="text"/>		\$500.0
<input type="checkbox"/>	<input type="checkbox"/>	Write-In	Carbon Fiber 3D Pri			\$8,000
<input type="checkbox"/>	<input type="checkbox"/>	Existing	Carbon Fiber 3D Pri			\$15,00

1-3 of 3( 1 selected) Page 1

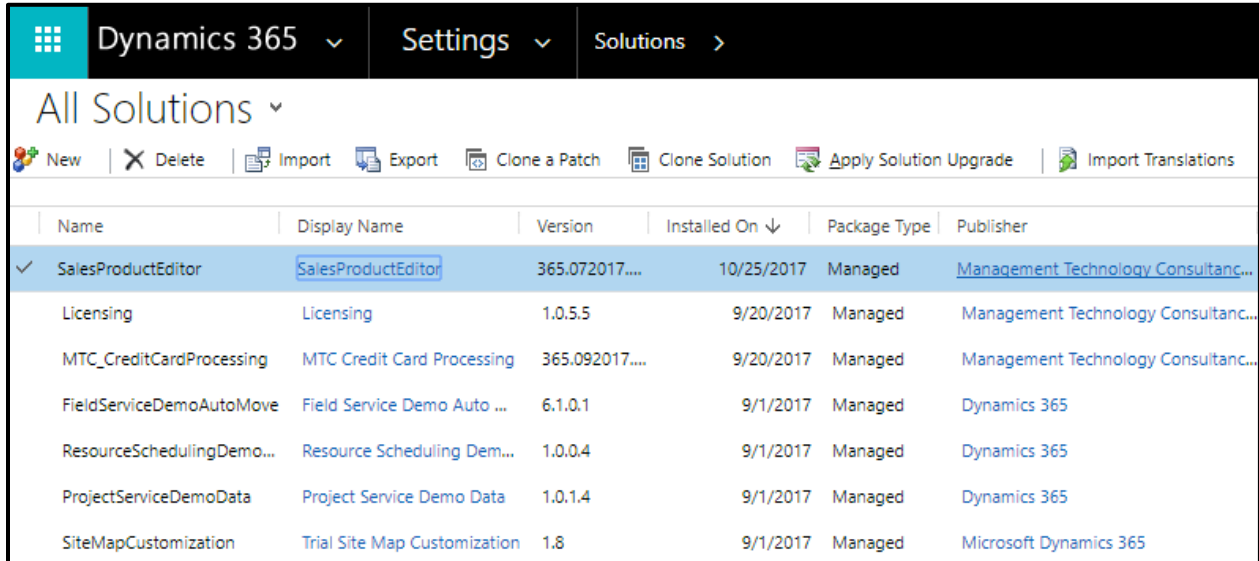
➤ Finally, click **Save** icon.



## 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.



Name	Display Name	Version	Installed On ↓	Package Type	Publisher
✓ 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

### Step2:

- Click on ok to start the uninstalling process of the solution.

