



# DYNAMIC QUICKSALES



# SOLUTION CONFIGURATION GUIDE



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## Solution Import

Please follow the below steps in order to start the import process:

1. Go to the “download” button on the solution page and download the latest managed solution zip file.

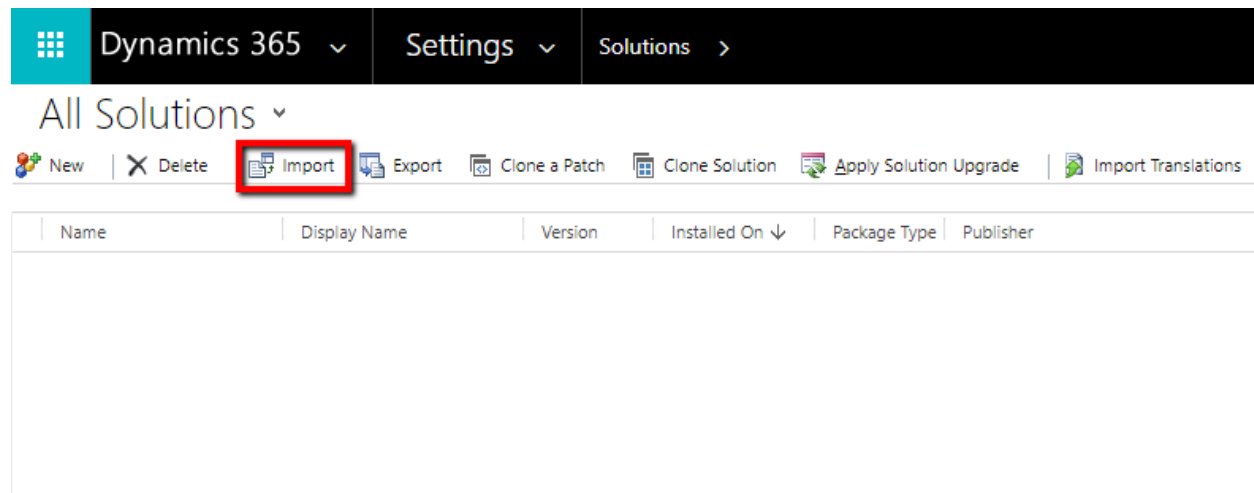


 Download |  Changelog

Dynamics 365 v9

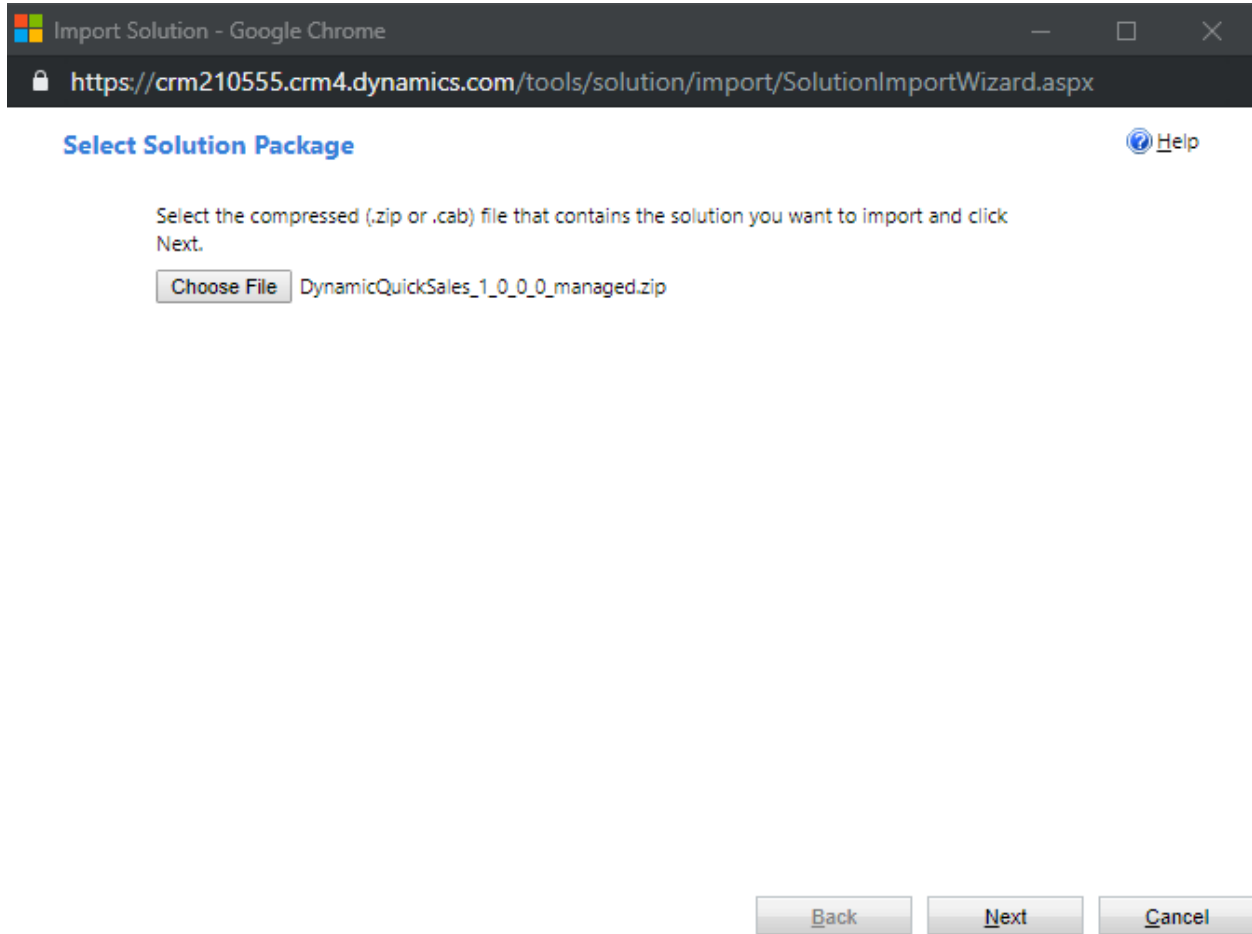
Version 1.0.0.0

2. Login to your Microsoft Dynamics CRM/365 organization and head to Settings -> Solutions and click on the “Import” button.



3. Select the solution file that you downloaded in Step 1 and Press Next.

4. Verify that you imported the correct Solution by checking the solution information and package details and press “Next”.



5. Please make sure that the **“Enable any SDK message processing steps included in the solution” option is selected** and select “Import”.



**Solution Information** Help

**Solution Information**

Name: Dynamic Quick Sales

Publisher: Dynamic Objects(dynamicobjectssarl)

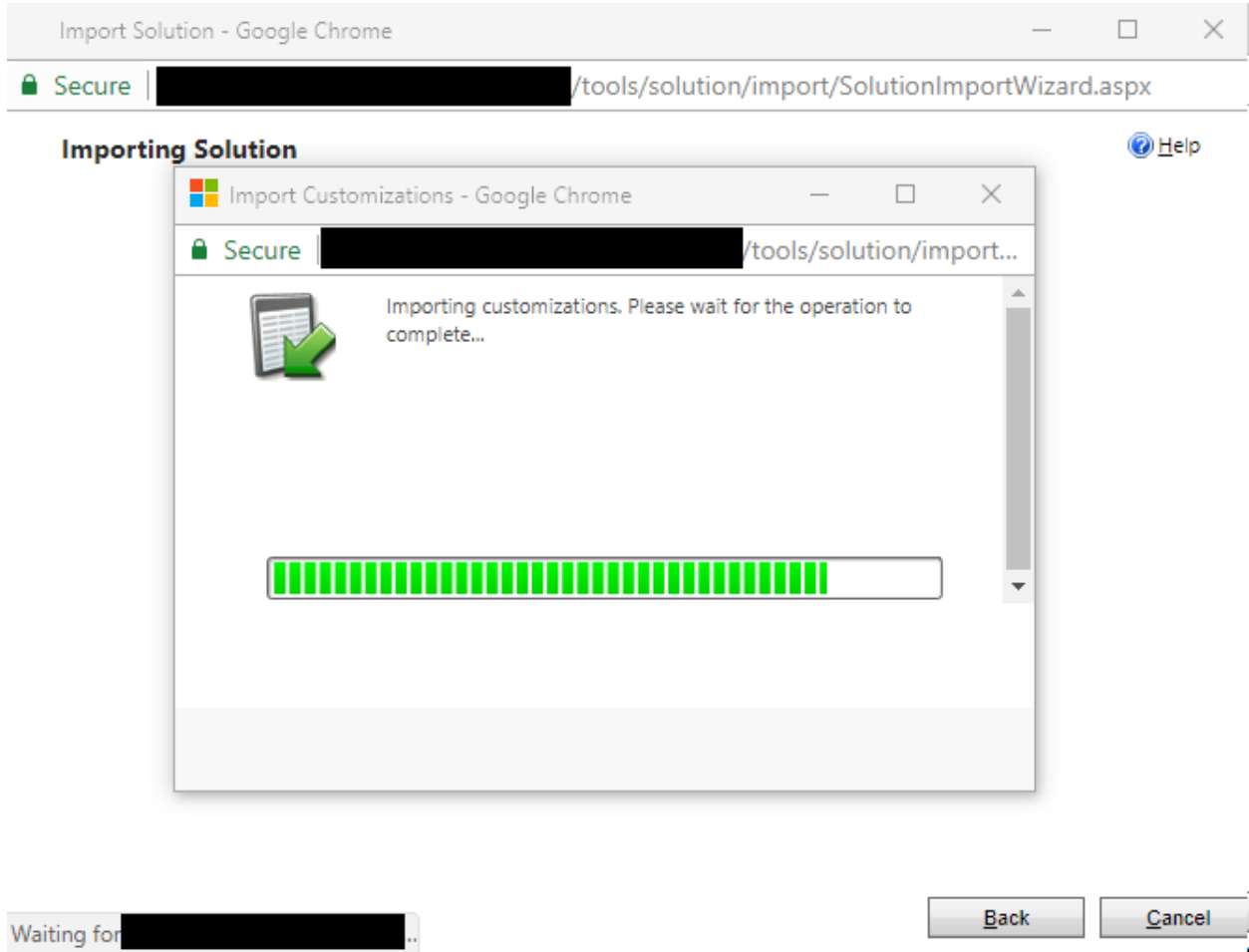
Package Type: Managed

[View solution package details](#)

**i** By enabling this command, you consent to share your data with an external system. Data imported from external systems into Microsoft Dynamics 365 are subject to our privacy statement that can be accessed [here](#). Please consult the feature technical documentation for [more information](#).

[Back](#) [Next](#) [Cancel](#)


6. The Solution import process will start. Please wait around 5 minutes for the solution import process to complete.








7. Once the import is complete, you will see a screen with an overview of the import and components. Please select close and proceed to Solution Registration.

## Importing Solution

 Help

 The import of solution: Dynamic Quick Sales completed successfully.

Date Time ↓	Type	Display Name	Name	Status
07:40:09.34	Security Role	Dynamic Qui...	Dynamic Qui...	 S
07:40:08.90	Security Role	Dynamic Qui...	Dynamic Qui...	 S
07:40:07.80	Plugin Assem...	DynamicObje...	DynamicObje...	
07:40:07.48	Chart		product	 E
07:40:07.47	Chart		do_dynamicq...	 E





Page 1


[Download Log File](#)











[Close](#)

## Solution Registration

1. When the import process is complete, please double click on the solution imported to start the registration process.

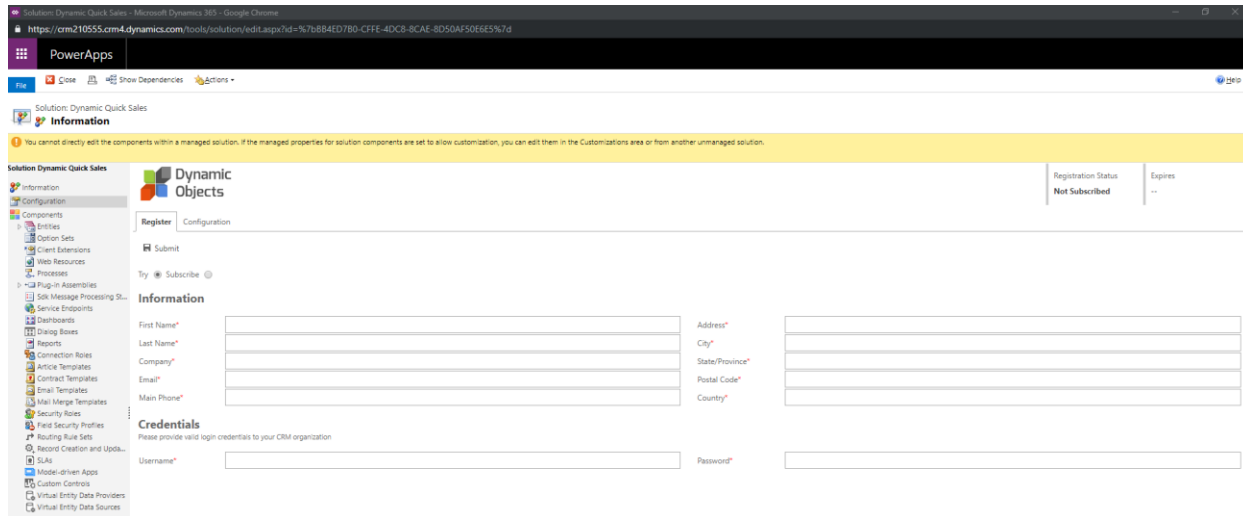
 Dynamics 365  Settings  Solutions 

All Solutions 

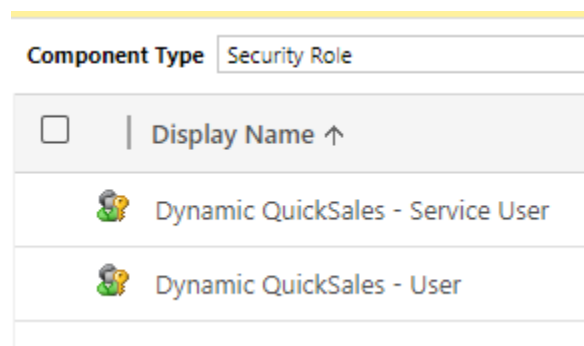
 New  Delete  Show Dependencies  Import  Export  Clone a Patch  Clone Solution  Apply Solution Upgrade  Import Translations  Export Translations

Name	Display Name	Version	Installed On ↓	Package T...	Publisher	Description
DynamicQuickSales	Dynamic Quick Sales	1.0.0.0	2/6/2019	Managed	Dynamic Objects	

2. Please fill-in your details in the “Information” section and make sure to enter the correct email details in order to receive important updates about the solution.



In the “Credentials” section, please type in the appropriate user with the required security role which will be used to renew your subscription. This user needs to be allocated the “Dynamic QuickSales– Service User” role.

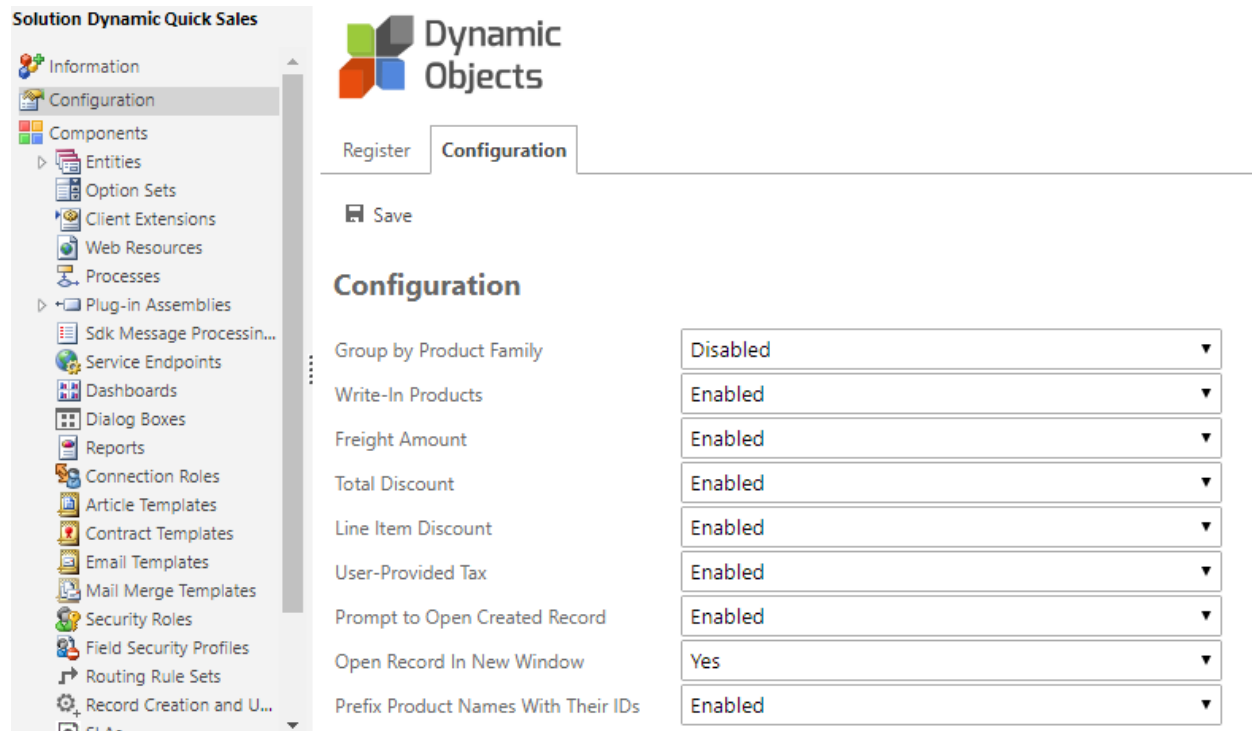


Once all the information is entered, please click “Submit” and you are subscribed for the 30-day trial.



## Solution Configuration

Now that you successfully registered your solution, please click on the **Configuration** tab



From the list of settings shown, enable and disable the settings you need in the solution and then click **Save**.

**N.B:** All Settings are set to enabled by default in case the solution is not configured.

Configuration	Description
Group by Product Family	<p><b>Enabled</b></p> <p>Displays the product family field in Dynamic QuickSales allowing users to filter products by Product Family.</p> <p><b>Disabled</b></p> <p>Disables feature and does not display Product Families in Dynamic QuickSales.</p>
Write-in Products	<p><b>Enabled</b></p> <p>Allows users to add write-in Products in Dynamic QuickSales.</p> <p><b>Disabled</b></p>



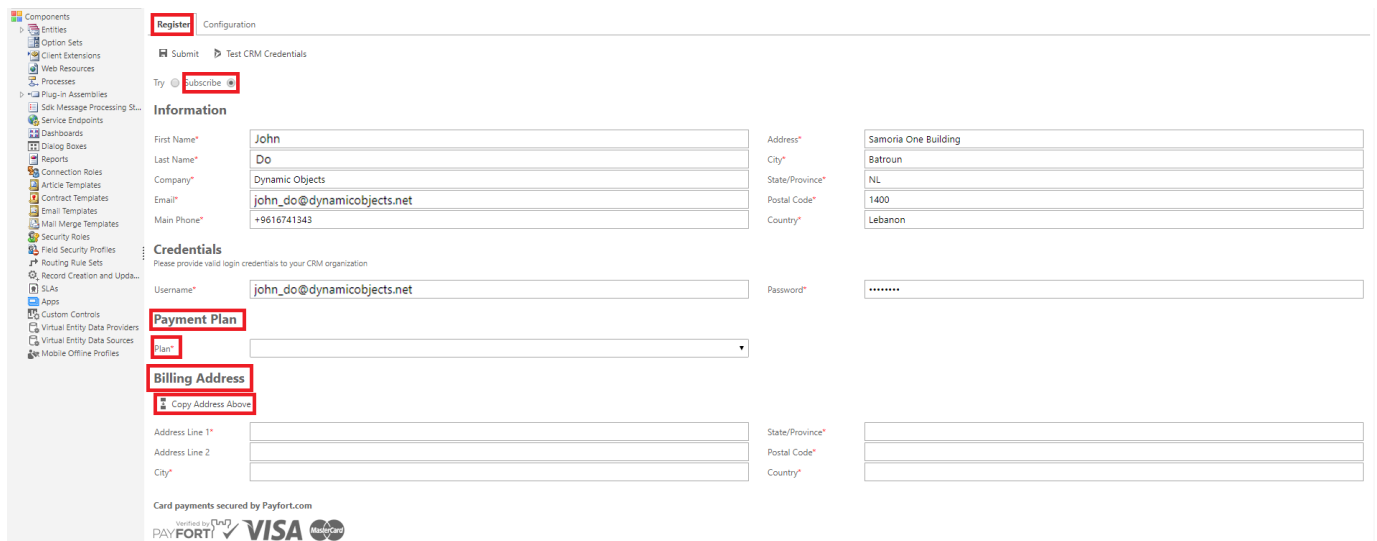
	Disables feature and does not Allow users to add write-in Products in Dynamic QuickSales.
Freight Amount	<b>Enabled</b> Enables the Freight Amount field in Dynamic QuickSales. <b>Disabled</b> Disables the Freight Amount field in Dynamic QuickSales.
Total Discount	<b>Enabled</b> Enables the Total Discount field in Dynamic QuickSales. <b>Disabled</b> Disables the Total Discount field in Dynamic QuickSales.
Line Item Discount	<b>Enabled</b> Enables the line Item Discount field in Dynamic QuickSales. <b>Disabled</b> Disables the line Item Discount field in Dynamic QuickSales.
User-Provided Tax	<b>Enabled</b> Enables the line Item Tax field in Dynamic QuickSales. <b>Disabled</b> Disables the line Item Tax field in Dynamic QuickSales.
Prompt to Open Create Record	<b>Enabled</b> Prompts the user to open the newly created record in Dynamic QuickSales. <b>Disabled</b> Disables the prompt for the user after creating a record in Dynamic QuickSales.
Open Record in New Window	<b>Enabled</b> Opens the newly created record in a new browser window in Dynamic QuickSales.

	<p><b>Disabled</b></p> <p>Opens the newly created record in the same window in Dynamic QuickSales.</p> <p><b>N.B:</b> This feature is always set to disabled in the Microsoft Dynamics 365 mobile application.</p>
<p><b>Prefix Product Names with their IDs</b></p>	<p><b>Enabled</b></p> <p>Concatenates the product ID with the Product Name and displays it in the Product field in Dynamic QuickSales.</p> <p><b>Disabled</b></p> <p>Displays the product Name as is in Dynamic QuickSales.</p>

## Solution Subscription

The trial solution will expire after 30 days; thus, you need to subscribe in order to continue using the solution features. The steps are as follows:

1. Under **Register** section click **Subscribe**.
2. In the **Payment Plan** section, select your preferred payment plan **Monthly** or **Yearly**.
3. In the **Billing Address** Section, Enter the billing address. You can use the **Copy Address Above** button to automatically copy the address details entered above or enter a different billing address.



**Register** Configuration

Submit Test CRM Credentials

Try **Subscribe**

**Information**

First Name\* John Address\* Samoria One Building  
 Last Name\* Do City\* Batroun  
 Company\* Dynamic Objects State/Province\* NL  
 Email\* john\_do@dynamicobjects.net Postal Code\* 1400  
 Main Phone\* +9616741343 Country\* Lebanon

**Credentials**

Please provide valid login credentials to your CRM organization

Username\* john\_do@dynamicobjects.net Password\* .....

**Payment Plan**

Plan\*

**Billing Address**

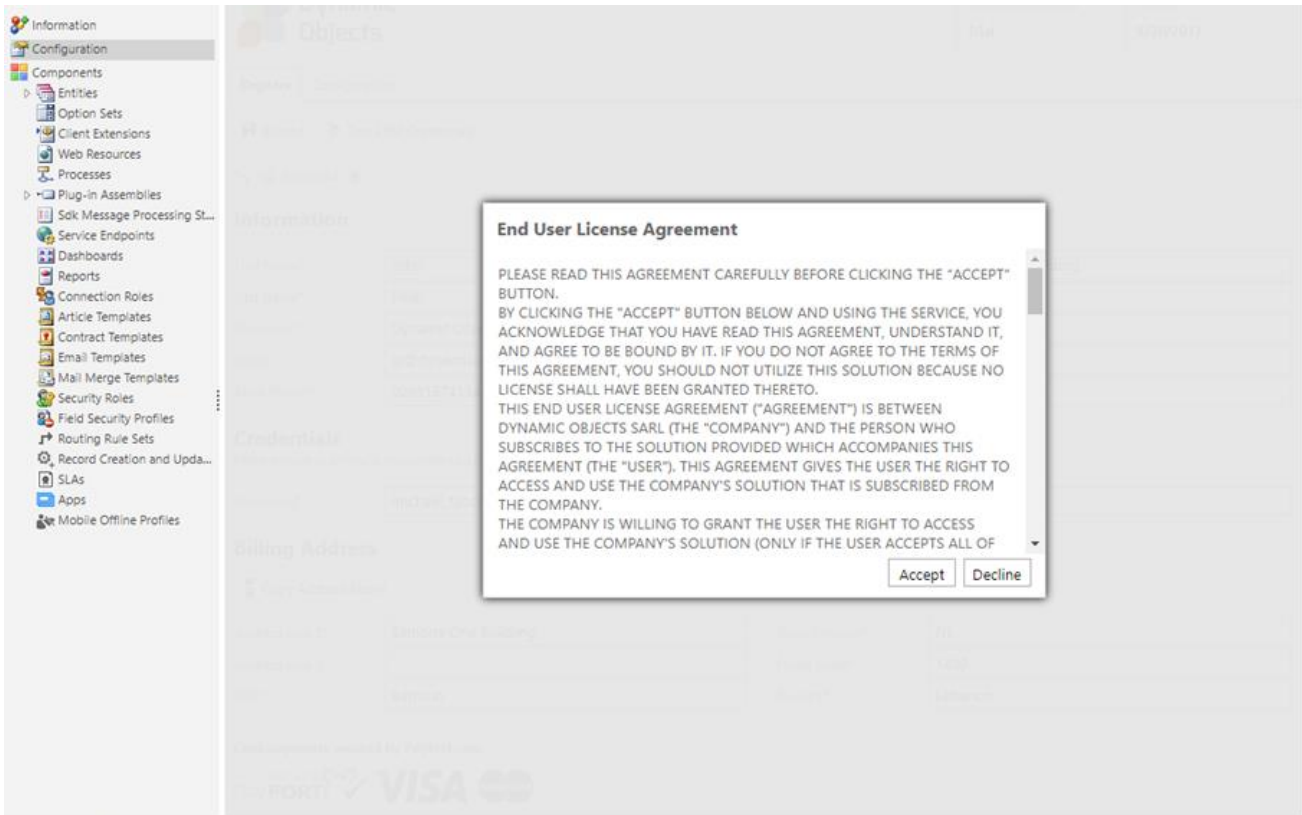
Copy Address Above

Address Line 1\* State/Province\*  
 Address Line 2\* Postal Code\*  
 City\* Country\*

Card payments secured by Payfort.com  
 Verified by PAYFORT! VISA MasterCard



4. Once **Plan** is selected and the billing fields are filled, press the **Submit** Button and you will be presented with the End User License agreement. Please read it carefully and press **Accept** to continue to the payment page.

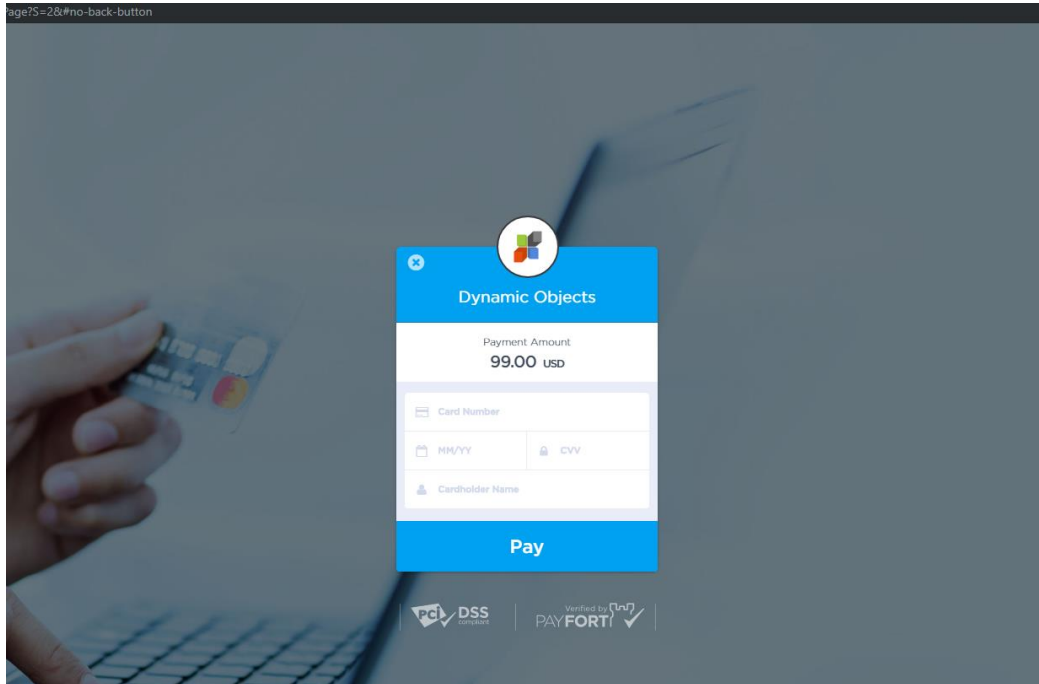


Status: Existing

5. The payment page lists the amount that you will be billed depending on your selected plan (Monthly or Yearly).

Enter your **Card Number, Expiration Date, CVV** and **Cardholder Name** and press the **Pay** Button.

**Note: We currently support only visa and Mastercard as payment methods.**



If the payment is Successful, you will be routed to the **Configuration** Page and the solution is extended for another period as per your selection (Month or Year).

The **Payment Method** section lists the masked card details so you keep track of the payment details used.

**Please note that the solution will automatically renew every month/year on the expiration date.**

If you wish to stop using the solution, please click on the **Unsubscribe** button and confirm.

The solution will remain active until the expiry date.

