



TrinSoft Power Utilities

Our powerful extension with features and utilities that all Dynamics 365 Business Central users need. Below you will find instructions on how to setup and use each feature or utility.

Purchase and Sales User ID Tracking

Overview

When a purchase or sales order is created, the ID of the user who created the document is captured and recorded in the appropriate table. The User ID is also maintained on the purchase order archives, purchase invoice, posted purchase invoices, sales order archives and posted sales invoices. You will see the User ID displayed on the “General” Fast Tab on each of these pages in Dynamics 365 Business Central.

How to Guide

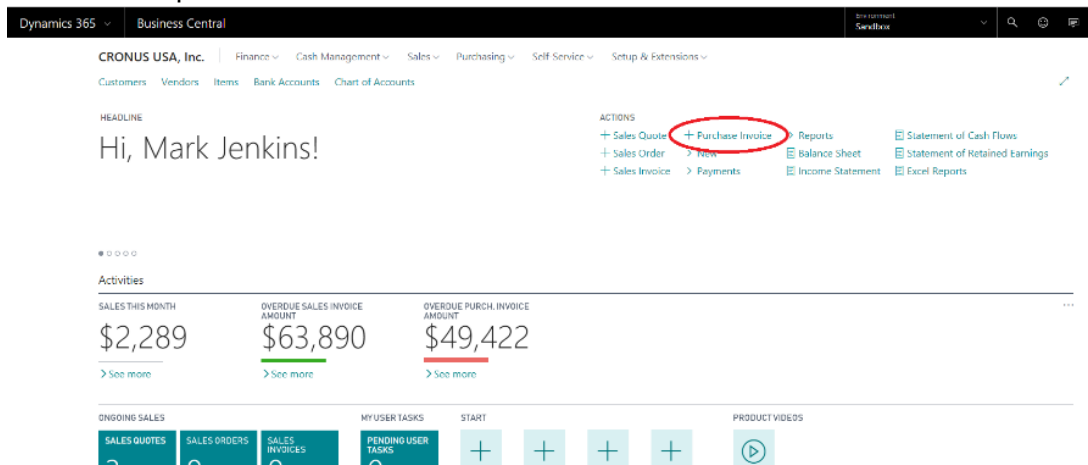
Setup

Once you have installed the TrinSoft Power Utilities extension into your Dynamics 365 Business Central, your system is setup and ready to go. The User ID field will appear on the Purchase Order and Sales Order pages as well as relevant pages such as the Purchase Order Archives, Purchase Invoice, Posted Purchase Invoices, Sales Order Archives and Posted Sales Invoices.

Step-by-Step instructions

The following is a guideline for using the TrinSoft Power Utilities

1. **New Purchase Invoice Example**
 - a. Open your Dynamics 365 Business Central.
 - b. Create a new purchase invoice.



c. Enter the Vendor No. and select the vendor.

NEW - PURCHASE INVOICE

Purchase Invoice

General

Vendor Name * [Empty] Due Date [Empty]

Contact [Empty] Vendor Invoice No. *

Posting Date [Empty] Entry User ID [Empty]

Lines

NO.	NAME	CITY	PHONE NO.
10000	Fabrikam, Inc.	Atlanta	
20000	First Up Computers	Chicago	
30000	Graphic Design Institute	Miami	
40000	White Street Impapers	Atlanta	
50000	Nod Publishers	Atlanta	

Subtotal Excl. Tax (USD) 0.00 Total Excl. Tax (USD) 0.00

Inv. Discount Amount (USD) 0.00 Total Tax (USD) 0.00

Invoice Discount % 0 Total Incl. Tax (USD) 0.00

d. The User ID will automatically populate after the vendor is selected on the new invoice.

NEW - PURCHASE INVOICE - 107218 - GRAPHIC DESIGN INSTITUTE

107218 · Graphic Design Institute

General

Vendor Name [Graphic Design Institute] Due Date [4/30/2017]

Contact [Brian Jasso] Vendor Invoice No. *

Posting Date [4/1/2017] Entry User ID [MJENKINS]

Lines

TYPE	NO.	DESCRIPTION/COMMENT	QUANTITY	UNIT OF MEASURE CODE	DIRECT UNIT COST EXCL. TAX	TAX GROUP CODE	LINE DISCOUNT %	LINE AMOUNT EXCL. TAX
Item	*	*						

Subtotal Excl. Tax (USD) 0.00 Total Excl. Tax (USD) 0.00

Inv. Discount Amount (USD) 0.00 Total Tax (USD) 0.00

Invoice Discount % 0 Total Incl. Tax (USD) 0.00

e. Finish the invoice by populating the Line information as needed.

NEW - PURCHASE INVOICE - 107218 - GRAPHIC DESIGN INSTITUTE

107218 · Graphic Design Institute

General

Vendor Name [Graphic Design Institute] Due Date [4/30/2017]

Contact [Brian Jasso] Vendor Invoice No. [20180604003]

Posting Date [4/1/2017] Entry User ID [MJENKINS]

Lines

TYPE	NO.	DESCRIPTION/COMMENT	QUANTITY	UNIT OF MEASURE CODE	DIRECT UNIT COST EXCL. TAX	TAX GROUP CODE	LINE DISCOUNT %	LINE AMOUNT EXCL. TAX
Item	1908-S	Blue armless swivel chair	1	PCS	148.10	FURNITURE		148.10

Subtotal Excl. Tax (USD) 148.10 Total Excl. Tax (USD) 148.10

Inv. Discount Amount (USD) 0.00 Total Tax (USD) 8.89

Invoice Discount % 0 Total Incl. Tax (USD) 157.00

f. When finished, the User ID will display in the Purchase Invoices list view.

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Vendors Incoming Documents Purchase Invoices Purchase Credit Memos Posted Purchase Invoices Posted Purchase Credit Memos

Purchase Invoices: All | Search | + New | Manage | Process | Invoice | Page | Actions | Show fewer

NO.	BUY-FROM VENDOR NO.	BUY-FROM VENDOR NAME	AMOUNT	ENTRY USER ID
107209	10000	Fabrikam, Inc.	214.00	
107210	20000	First Up Consultants	1,803.60	
107211	30000	Graphic Design Institute	4,253.20	
107212	10000	Fabrikam, Inc.	298.40	
107214	30000	Graphic Design Institute	928.80	
107216	10000	Fabrikam, Inc.	505.40	MJENKINS
107217	30000	Graphic Design Institute	780.70	MJENKINS
107218	30000	Graphic Design Institute	148.10	MJENKINS

2. Repeat these steps for other purchase and sales documents.

View Historical Data for Customers and Vendors

Overview

It may be critical to know sales and purchase information that you can't readily get with native Dynamics 365 Business Central. We have developed some views that will bring information quickly to view without having to sort and pull many documents.

How To

Setup

Once the TrinSoft Power Utilities application is installed, all the sales and purchase information listed below will be instantly available to view.

Usage Instructions:

Simply open the customer or vendor page and you will have access to the sales and purchasing information as outlined below.

Customer Card

View Sales Invoice, Sales Credit Memo, Sales Shipment and Sales Return Receipt Lines from the customer card under the History Fast Tab.

The screenshot displays the 'CUSTOMER CARD' for '10000 · Adatum Corporation'. The interface includes a navigation bar with options like 'Report', 'New Document', and 'Request Approval'. A 'History' dropdown menu is open, listing various document types such as 'Sales Invoice Lines', 'Sales Credit Memo Lines', 'Sales Shipment Lines', and 'Sales Return Receipt Lines'. The main card area is divided into sections: 'ADDRESS' (New York, NY, 10019, US), 'CONTACT' (Robert Townes, robert.townes@contoso.com), and a 'Sales' section with a 'Show more' link. On the right, there is a profile picture, an 'Attachments' section with 0 documents, and a 'Sell-to Customer Sales History' table.

Ongoing Sales Quotes	0	Ongoing Sales Blanket Orders	0	Ongoing Sales Orders	1
Ongoing Sales Invoices	2	Ongoing Sales Return Orders	0	Ongoing Sales Credit Memos	0
Posted Sales Shipments	35	Posted Sales Invoices	35	Posted Sales Return Receipts	0

Vendor Card:

View Purchase Invoice, Purchase Credit Memo, Purchase Receipt and Purchase Return Shipment lines on the Vendor Card under the History Fast Tab.

← VENDOR CARD ✎ + 🗑️ 🔍

10000 · Fabrikam, Inc.

Process Report Request Approval New Document Actions **Navigate** Report Less options

Vendor Purchases Documents **History**

No.	10000				
Name	Fabrikam, Inc.				
Blocked					

Address & Contact


ADDRESS

Address	10 North Lake Avenue	Contact Code	
Address 2			Krystal York
City	Atlanta		4255550101
State	GA	Home page	krystal.york@contoso.com
ZIP Code	31772		www.royalmail.co.uk
Country/Region Code	US	Our Account No.	

[Show on Map](#)

Invoicing >

Purchase Invoice Lines	2,071.13
Purchase Credit Memo Lines	
Purchase Receipt Lines	2,071.13
Purchase Return Shipment Lines	
Ledger Entries	
Statistics	Show more
Purchases	
Entry Statistics	
1099 Statistics	
Statistics by Currencies	
Item Tracking Entries	



Attachments

Documents 0

Vendor Statistics

Balance (\$)	2,071.13
Outstanding Orders (\$)	5,792.79
Amt. Rcd. Not Invd. (\$)	8,275.42
Outstanding Invoices (\$)	226.84
Total (\$)	16,366.18
Overdue Amounts (\$) as of 0...	2,071.13
Invoiced Prepayment Amoun...	0.00
Payments (\$)	20,814.56
Last Payment Date	2/10/2018