

USER MANUAL



Stock Management For Dynamics 365 Sales

Version: 4.1

Compatibility:

Microsoft Dynamics CRM 2016 and Dynamics 365

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Introduction

Stock Management for Dynamics 365 Sales from AppJetty helps you to streamline your purchase and stock management process.

With the help of Stock Management plugin, you can manage stocks (keep track of stock transactions, low stocked products) and purchases (generate purchase orders, purchase invoices, low stock purchase orders, RMA-Return Merchandise Authorization and RTS-Return To Suppliers). You can also generate reports for RMA, RTS, purchase orders, and purchase order invoices.

Stock Management for Dynamics 365 Sales enables you to generate inventory reports of stock history, detailed stock history, inventory status. You can also analyze your inventory through charts of warehouse stock, returned and available stocks. It comes with a warehouse module using which you can create a new warehouse and allocate warehouses for every stock of products. You can also transfer the stock of products from one warehouse to another.

In addition to the above functionalities, it is also possible to view the total amount of credits and debits carried out in your inventory orders through this plugin. You can also generate account report which will provide a complete detail about the detailed history of the credits or debits made in any stock of an inventory. It will also provide basic summary like total sales, returns, and purchases along with other details.

Benefits of Stock Management for Dynamics 365 Sales

Compelling benefits that streamline your stock management:

- Helps you manage all your stock purchases in an efficient manner by automating documentation.
- Keeps track of your entire inventory - how many products purchased, how many remaining in stock, how many sold, etc.
- Helps you keep a track of stocks so that you do not run out of stocks or keep more stock than necessary.
- Easily manages all the documents required to fulfill a purchase like purchase orders and purchase invoices.
- Eliminates chances of human errors with an automated system.
- Accurate data delivers critical information to help you make right decision and avoiding mistakes.
- Analyze your inventory by viewing bar chart and pie chart for your warehouse stocks as well as available and returned stocks.
- Easily manage warehouses for your products
- Quickly transfer stock of products from one warehouse to another.
- Easily manage Credits and Debits of your account and view its details through an Account Report.

Prerequisites

Following point must be followed before you start installing the Plugin:

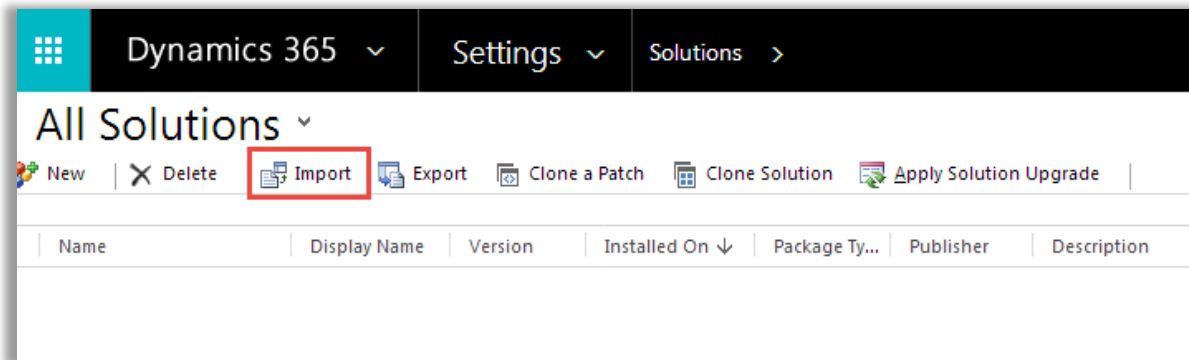
- You should be logged into Dynamics CRM or Dynamics 365, Online or On-Premise.

Installation & Configuration

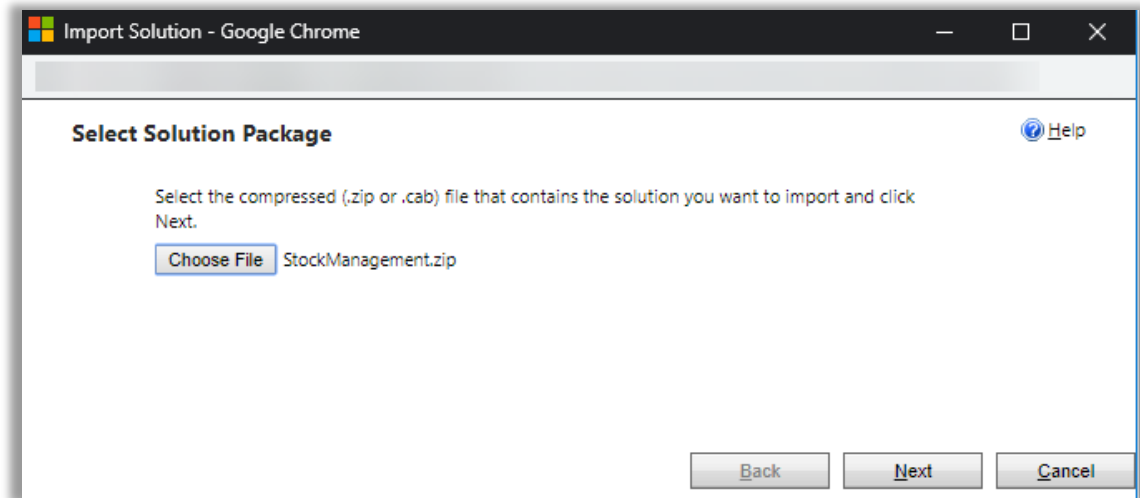
Installation Steps

To install 'Stock Management' plugin, the following steps has to be followed:

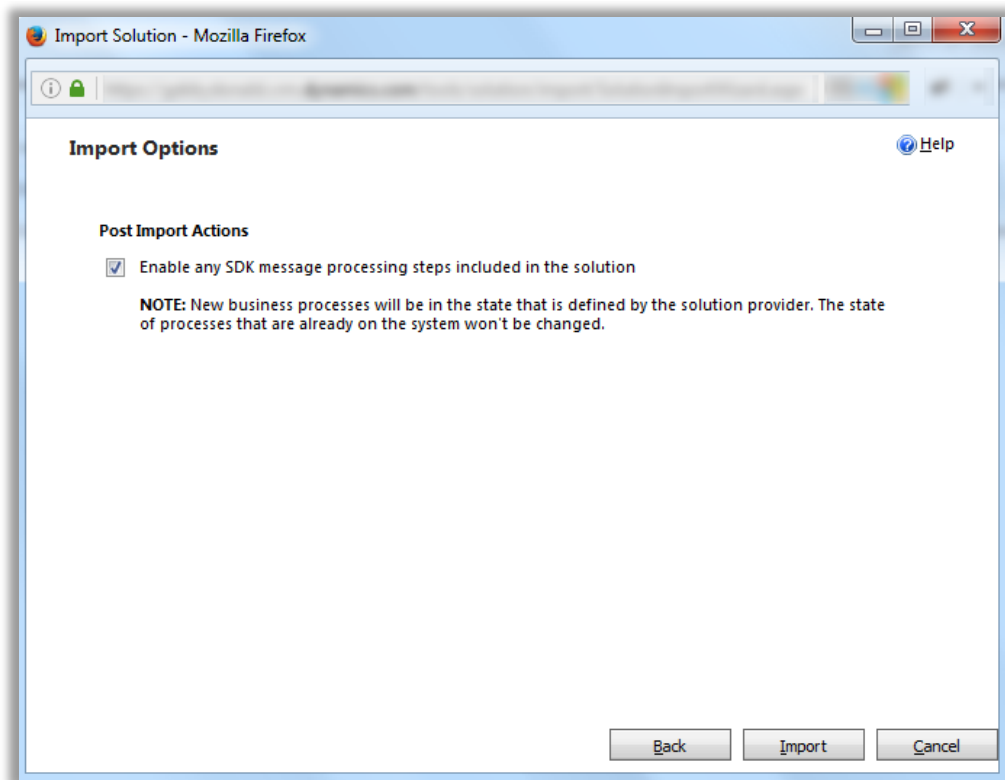
- On purchasing the plugin, you will get a zip file named StockManagement.zip.
- Login into your CRM Account and click on **Settings -> Solutions**



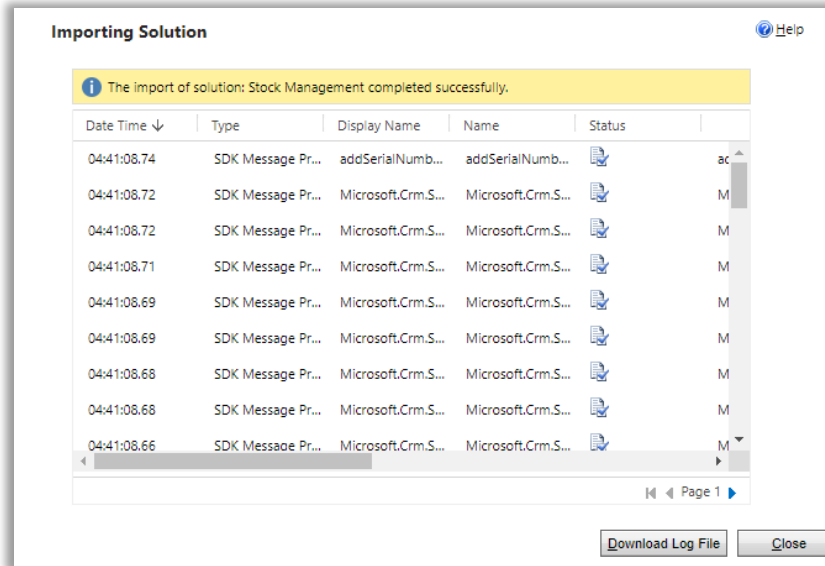
- Click on 'Import' to upload and install the Solution.
- Click on 'Browse' button and choose the Package Zip File for Stock Management from the Import Solution Window.



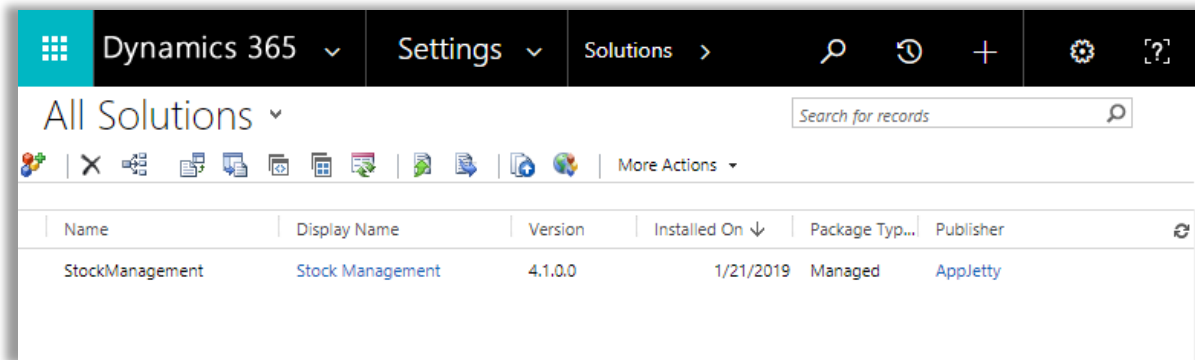
- Click on 'Next' for further processing.



- Check the checkbox to enable any SDK message processing steps included in the solution and click on Import button to Import the Solution.



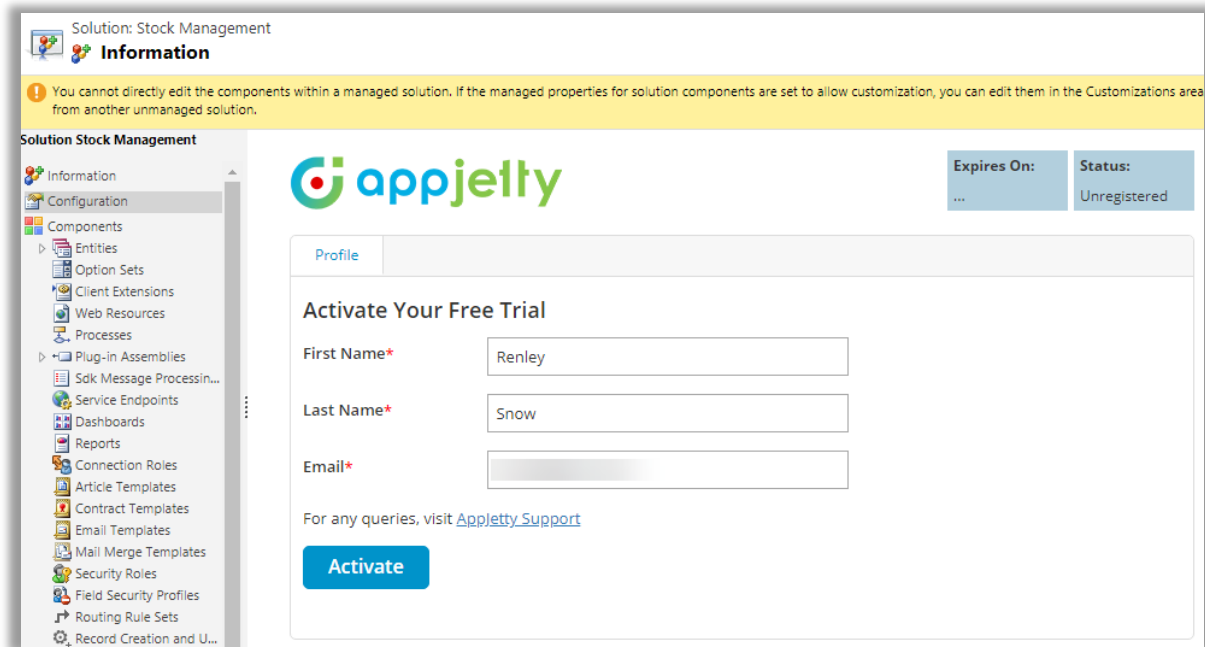
- Click on 'Close' to complete the process.



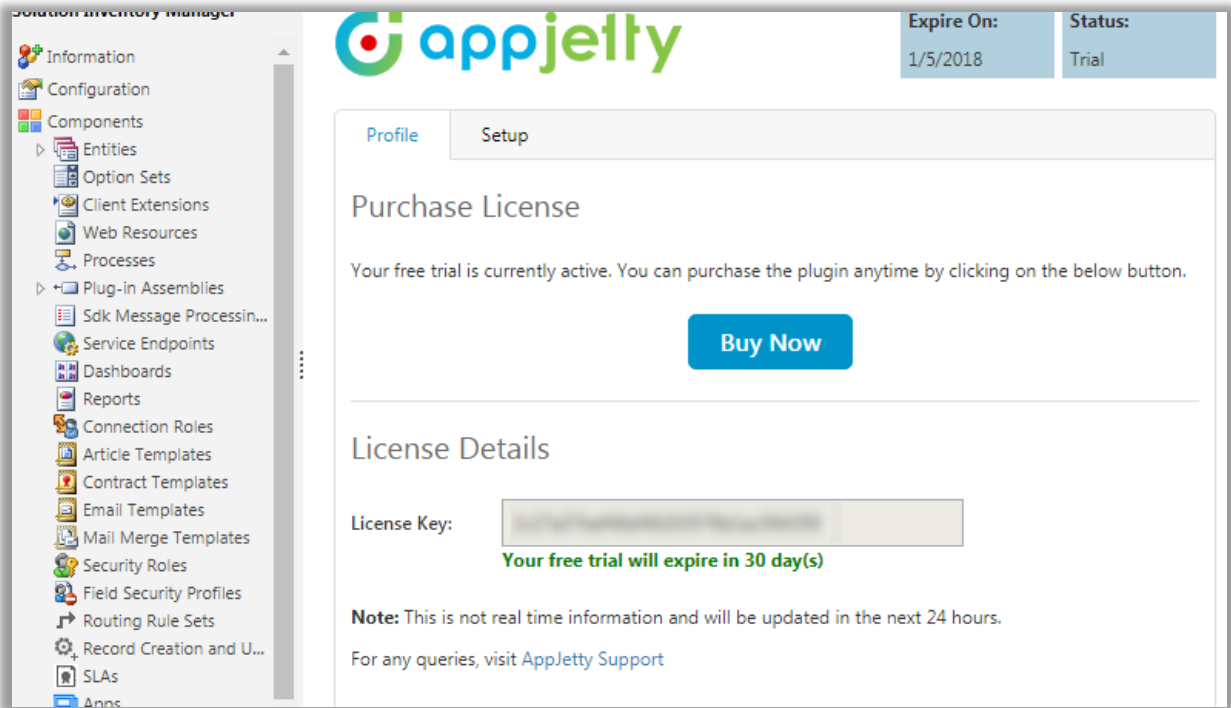
- Once you import the solution, it will be displayed in the solutions grid view.

Configuration Steps

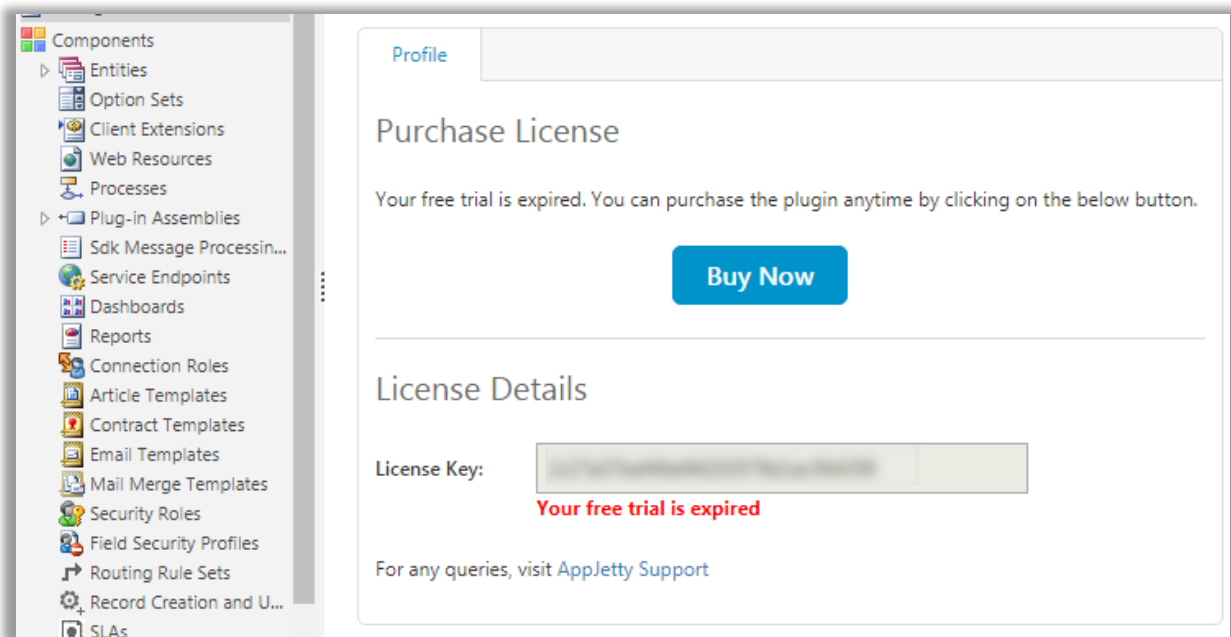
- Double click on **'Stock Management'** solution to configure the plugin with your license key.
- This will open up a new window. Click on **'Configuration'** from the options provided on the left side.



- You can activate your one-month free trial or directly purchase the license.
- To get a one-month free trial license key, fill out the details and click on **'Activate'** button.
- Your trial will get activated and expiry date will be displayed on top.



- You can purchase the licensed version any time. To purchase the license, click on **'Buy Now'** button.

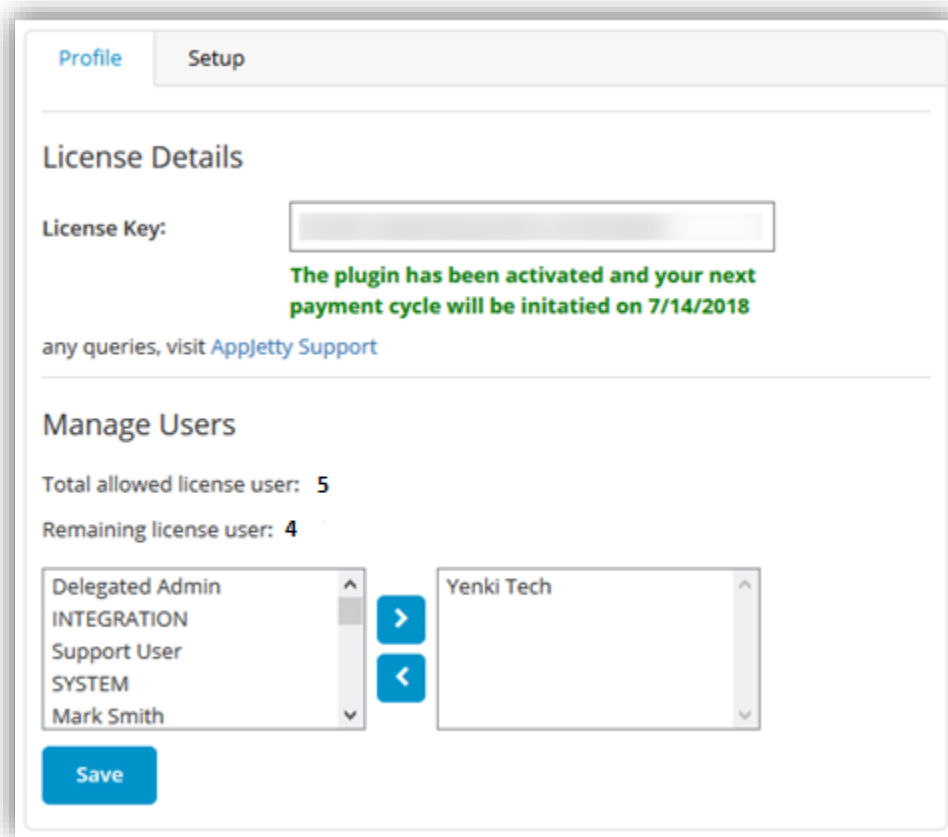


- On expiration of Trial, a message will appear that the trial has been expired. Now to purchase the license click on **'Buy Now'** button.
- This will redirect you to our product page and a pop-up will appear to request quote. Click on **'Add to Cart'** button and complete the purchase process.

The screenshot shows a purchase form with the following sections:

- Your Domain *** with an information icon and a text input field containing "www.domain.com".
- Plans** with two radio button options: "Monthly" (selected) and "Annual".
- Users Limit** with a dropdown menu showing "1 User +\$49.00".
- A blue footer bar containing the price "\$49.00 PER YEAR" and a white "Add to Cart" button with a shopping cart icon. The button is highlighted with a red border.

- On successfully completing the process and once you have purchased the plugin, you will receive your license key via email along with steps to complete the license configuration.
- Click on '**Activate**' button to activate your license.



- After submitting the valid license key, you will be navigated to the **'Setup'** tab.

The screenshot shows a user interface with two tabs: 'Profile' and 'Setup'. The 'Setup' tab is active. Under the 'Email Notification Settings' section, there is a checked checkbox for 'Enable Email Notifications'. Below it are three dropdown menus: 'Reasons' (with a red asterisk and help icon), 'Users' (with a red asterisk and help icon), and 'Reorder Notification Users' (with a red asterisk and help icon). The 'Reasons' dropdown is set to 'New Stock (Inward), Damage St...', 'Users' is set to 'Prince Mountbatten', and 'Reorder Notification Users' is also set to 'Prince Mountbatten'. A blue 'Save' button is located below these settings. The 'Other Settings' section follows, with three checked checkboxes: 'Enable Warehouses', 'Enable Credit-Debit Module', and 'Error Log Tracking'. Below these are two blue buttons: 'Save' and 'Configure Languages'.

- From **'Setup'** tab, you can enable/disable Email Notification Settings, Warehouses, Credit and Debit Module.
- To enable the Email Notifications for your Stock Transactions, check the **'Enable Email Notification'** checkbox.
- By checking the **'Enable Email Notification'** checkbox, **'Reasons'**, **'Users'** and **'Reorder Notification Users'** dropdown list will appear below the Enable Email Notification.

Email Notification Settings

Enable Email Notifications ?

Reasons: * ? All selected (11) ▼

Users: * ? Garry Mcwan ▼

Reorder Notification Users: * ? None selected ▼

Save

Search ☒

- Select all
- Garry Mcwan

- **Reasons:** Select the reasons for which you want to receive email notifications.
- **Users:** Select the users who will receive the email notifications for their stock transactions.
- **Reorder Notification Users:** Select the users who will be receiving email notifications related to product reordering.
- To enable the Warehouses in Stock Management For Dynamics 365 Sales, navigate to the **‘Other Settings’** section and check the **‘Enable Warehouses’** checkbox and to enable Credit - Debit module check the **‘Enable Credit - Debit Module’** checkbox.
- Check the **‘Error Log Tracking’** checkbox to enable error log tracking.

Other Settings

Enable Warehouses ?

Enable Credit-Debit Module ?

Error Log Tracking ?

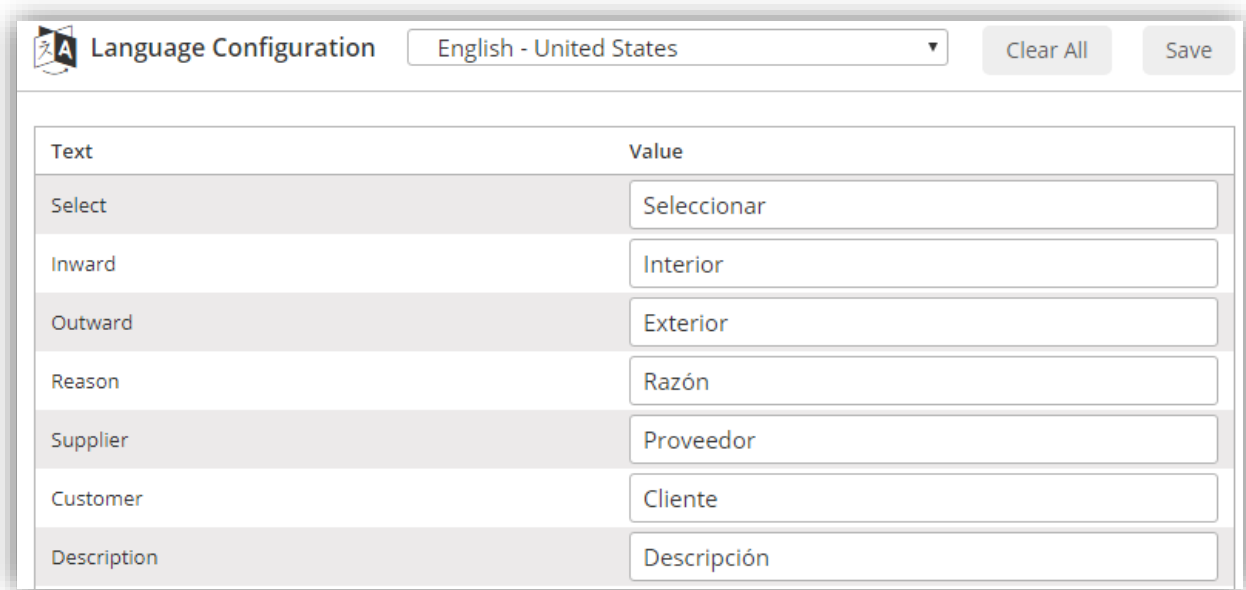
Save **Configure Languages**

- Once you have enabled Warehouses and Credit –Debit Module, you can access it from Products and Orders module.

Note: Once warehouses are enabled and transactions have been performed, warehouses cannot be disabled.

Configure Languages:

- You can also configure language of your choice by clicking on configure languages button available on set up page.
- On configure language page, select the language from dropdown that you wish to configure messages for.



The screenshot shows a 'Language Configuration' window. At the top left is a language icon. To its right is the title 'Language Configuration'. Further right is a dropdown menu currently set to 'English - United States'. To the right of the dropdown are two buttons: 'Clear All' and 'Save'. Below this header is a table with two columns: 'Text' and 'Value'. The table contains the following rows:

Text	Value
Select	Seleccionar
Inward	Interior
Outward	Exterior
Reason	Razón
Supplier	Proveedor
Customer	Cliente
Description	Descripción

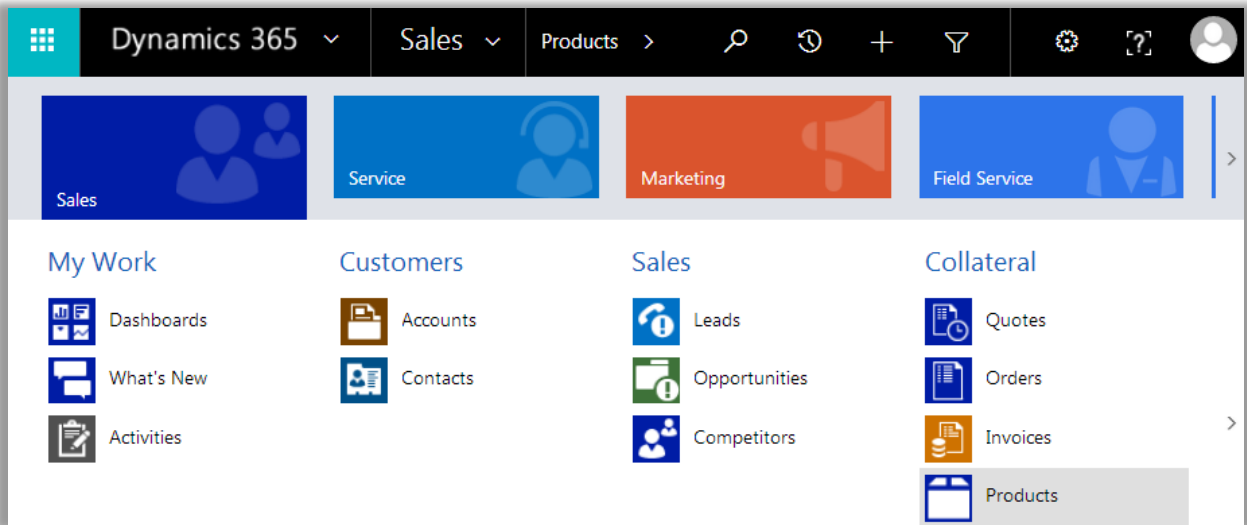
- Here, user needs to add translations themselves for the messages in the language of their choice.
- Click on save button to save the language translations.

Note: For configuring languages, user first needs to manage language settings from CRM. Languages that are selected in CRM can be configured for the calendar.

Procedure

Stock Management

- To manage the stock of products, navigate to **Sales -> Products**.



- To manage the stock of a particular product, click on that product name from the list of products in products listing page.
- You will be able to manage only those products which are Active.

→ All Products, Families & Bundles ▾

✓	Name	Product ID	Hierarchy Path ↑	Valid From	Valid To	Status	Product Structu	⌵	↻
📦	ABS Filament 3D Printer 4 Inch	ABS Printer 1				Active	Product		Yes
📦	Carbon Fiber 3D Printer 15 inch	Carbon Printer 2				Active	Product		Yes
📦	Backup Cooling Fan for 3D Printer	Backup 1				Active	Product		Yes
📦	60 Watt Light Bulbs	60WLB				Active	Product		Yes
📦	27 inch Patient Monitor	27IPM				Active	Product		Yes
📦	Printer Bundle	All Printet Bundle				Active	Product Bundle		No
📦	32 inch Monitor	32IM				Active	Product		Yes

- By clicking on the product name, its Product Detail Page will be displayed, wherein you will find a section for Stock Management along with a **'Manage Stock'** and **'View History'** button.

- In the stock management panel, you can find product related details like available stock, minimum stock level, reordering quantity, total inwards, total outwards, whether product is a serial number product or not and know if a product is low stock enabled product or not. You also get idea from detail page itself if alerts and reordering is enabled or not.
- Also default supplier and default warehouse assigned to the product will be shown in the stock management panel. Default supplier will be assigned as default for automatically generated purchase order.

The screenshot shows the 'PRODUCT' detail page for 'Carbon Fiber 3D Printer 15 inch'. The page is divided into two main sections: 'SUMMARY' and 'STOCK MANAGEMENT'. The 'SUMMARY' section lists various product attributes such as Name, Product ID, Family Hierarchy, Valid From, Valid To, Description, Unit Group, Default Unit, Default Price List, Decimals Supported, Subject, and Status. The 'STOCK MANAGEMENT' section displays stock-related information including Has Serial Number, Manage Stock, Stock, Inwards, Outwards, Enable Low Stock, Minimum Stock, Enable Alert, Enable Reordering, Reorder Quantity, Default Supplier, and Default Warehouse. Two buttons, 'MANAGE STOCK' and 'VIEW HISTORY', are visible at the bottom right of the 'STOCK MANAGEMENT' section.

SUMMARY	
Name *	Carbon Fiber 3D Printer 15 inch
Product ID *	Carbon Printer 2
Family Hierarchy	--
Valid From	--
Valid To	--
Description	--
Unit Group *	Business User (sample)
Default Unit *	Administrative User (sample)
Default Price List +	CRM Service USA
Decimals Supported *	2
Subject	--
Status *	Active


STOCK MANAGEMENT	
Has Serial Number	--
Manage Stock	Yes
Stock	39.00
Inwards	74.00
Outwards	35.00
Enable Low Stock	True
Minimum Stock	10.00
Enable Alert	Yes
Enable Reordering	Yes
Reorder Quantity	20.00
Default Supplier	AGS
Default Warehouse	Cargo

- Now click on 'Manage Stock' button. This will open up a new window with stock details, wherein you can configure your stocks for that product.
- It will display the current stock of the product, its total inward & outward quantity till now. Check the 'Manage Stock' check box to enable stock management for the selected product.

Stock Management & Configurations

Asus Nvidia Geforce

Manual Stock Management -


Manage Stock ? Has Serial Number ? 


Stock Availability ? 0.00

Total Inward ? 0.00

Total Outward ? 0.00

Reason ? ▼ +

Warehouse ? ▼ + 

Supplier * ? ▼ + 

Quantity * ? [Add Serial Number](#)

Reason Description ?

- If product has serial number as well, check the checkbox **'Has Serial Number'**.
- To update the serial number, click on **'Update Serial No.'** button and if the serial number is not added click on **'Add Serial Number'** button besides quantity field.
- By clicking on Add Serial Number, it will open screen where you can either add all numbers manually or directly import csv or xlsx file.
- Along with file selection, you can also select sheet from the dropdown if your selected file has multiple sheets.

The screenshot shows a dialog box titled "Serial Number(s)". It contains a "Choose File" button with the text "SerialCSV.xlsx" next to it. To the right is a dropdown menu with "Serial1" selected and a downward arrow. Below the dropdown is a blue "Import" button. Underneath, the text "Serial Number(s):" is followed by three empty text input fields. At the bottom left is a blue "Save" button.

Note: It is mandatory to have Serial Number once the serial number is enabled for a product. And once the stock is managed without enabling the Serial Number, you cannot enable serial number for that product anymore.

- You can update the stock by entering the quantity in the **'Quantity'** text box.
- After entering the quantity, select supplier for the stock update from **'Supplier'** dropdown list. You can also add a new supplier by clicking on **'Add Supplier'** button.
- This will open up a new window to enter the details of the new supplier clicking on **'Save'** button will add the supplier in dropdown list. If not added, then click on the **'Refresh'** icon besides the **'Add Supplier'** button to refresh the supplier list.

SUPPLIER : INFORMATION

New Supplier

Supplier Name *	DFD	Main Phone	--
Supplier Number	S101	Other Phone	--
Web Site	--	Fax	--
Email Address	--	Currency	--

Supplier Details

Supplier Address

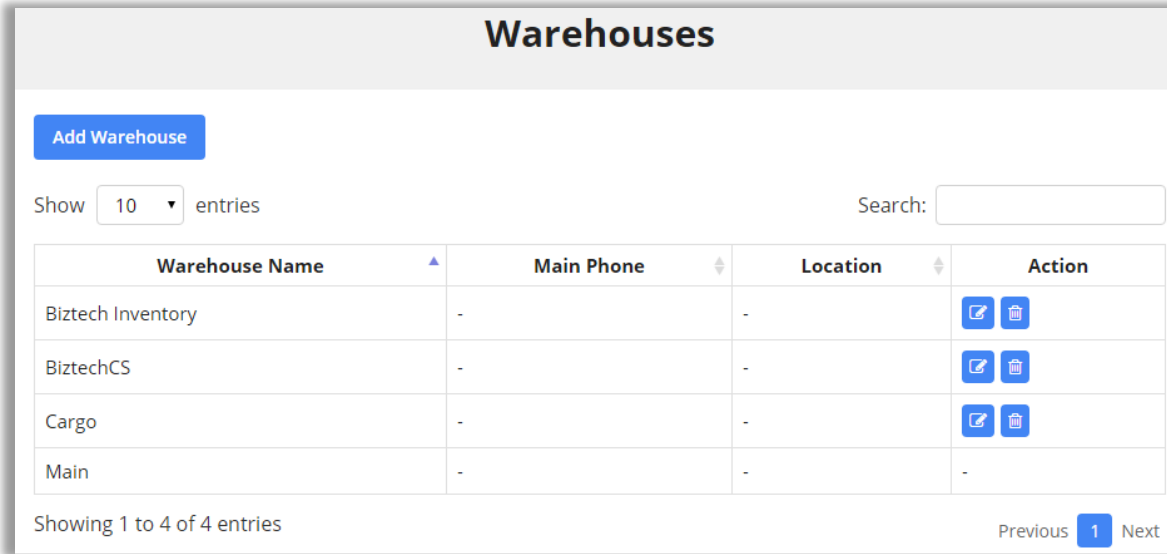
Street1	--	City	--
Street2	--	State/Province	--
Street3	--	Zip/Postal Code	--
Country/Region	--		

- Now, to select the warehouse for the stock update, choose the warehouse from the **'Warehouse'** dropdown list. You can also add a new warehouse by clicking on **'Add Warehouse'** button.
- This will open **'Create Warehouse'** window, where you can enter all relevant details for the warehouse.

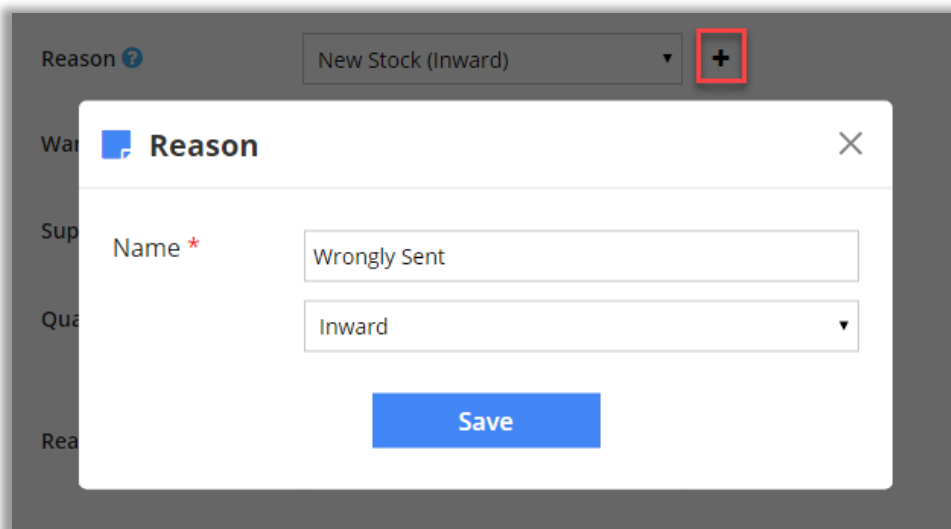
Create Warehouse

Warehouse Name*	<input type="text" value="Warehouse Name"/>	Main Phone	<input type="text" value="Main Phone"/>
Other Phone	<input type="text" value="Other Phone"/>	Street1	<input type="text" value="Street1"/>
Street2	<input type="text" value="Street2"/>	Street3	<input type="text" value="Street3"/>
City	<input type="text" value="City"/>	State/Province	<input type="text" value="State/Province"/>
Country/Region	<input type="text" value="Country/Region"/>	Zip/Postal Code	<input type="text" value="Zip/Postal Code"/>

- Along with creation of warehouse, you get to view list of warehouses where you can also edit or delete the warehouse by clicking on **'Edit'** and **'Delete'** icon respectively under the **'Actions'** column.



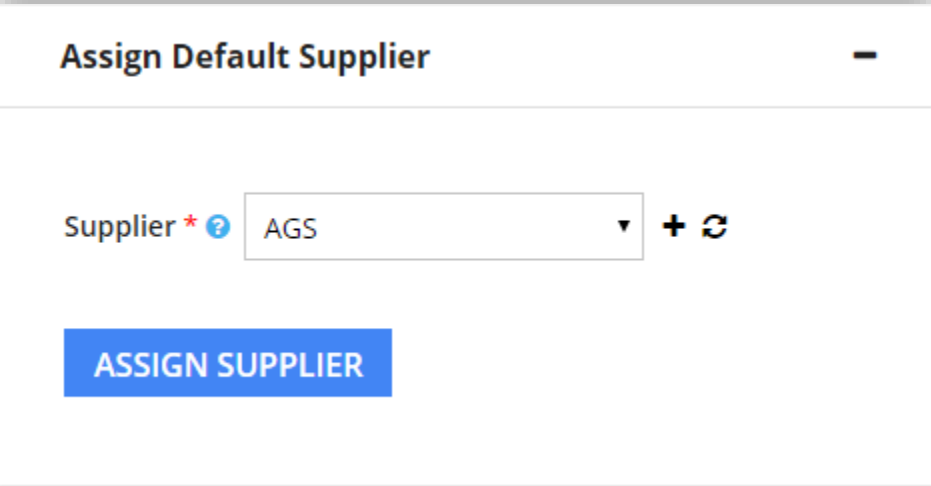
- Thereafter, to add a new warehouse, click on **'Add Warehouse'** button present on the top left corner. This will display **'Create Warehouse'** section.
- Now, enter the basic details of the warehouses and click on **'Save'** button. After clicking on **'Save'** button, the warehouse will be added in the dropdown list. If not added, click on the **'Refresh'** icon besides the **'Add Warehouse'** to refresh the warehouse list.
- The reason for stock update can be selected from the drop-down list or a new reason can be added by clicking on the **'Add Reason'** Button.



- You will see a pop-up wherein you need to enter the name of new reason and select whether it is an inward or outward transaction. Clicking on **'Save'** button will add the reason in the **'Reason'** dropdown list.
- Thereafter, enter the reason for stock management in **'Reason Description'** text field and click on **'Save'** button to manage the stock for the particular product.

Assign Supplier

- To assign a supplier to the product, select a supplier from the **'Supplier'** dropdown list and click on **'Assign Supplier'** button.

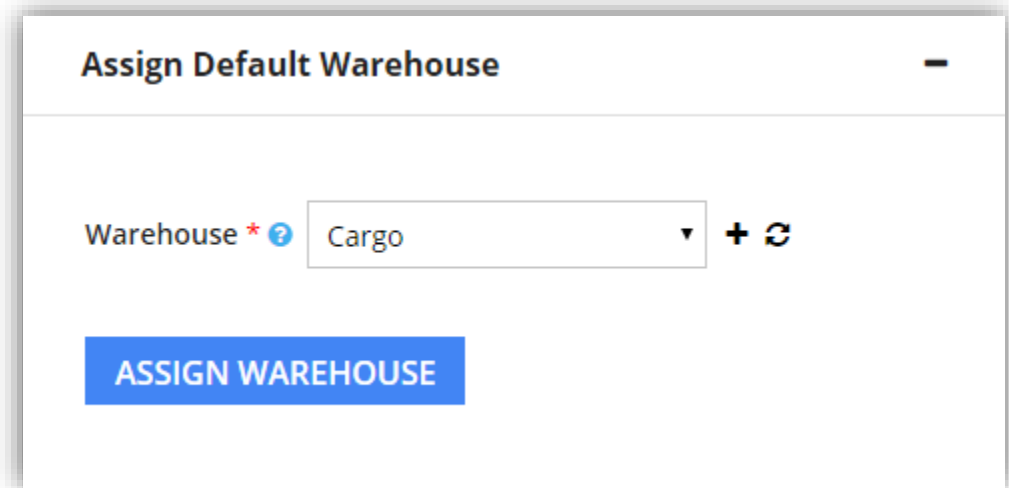


The screenshot shows a dialog box titled "Assign Default Supplier". Inside the dialog, there is a label "Supplier *" with a help icon. Next to it is a dropdown menu currently displaying "AGS". To the right of the dropdown are a plus sign and a refresh icon. Below these elements is a prominent blue button labeled "ASSIGN SUPPLIER".

- You can also add a new supplier for the product by clicking on **'Add Supplier'** button. This will open a new window where you can enter the details of supplier and add the supplier to the list.
- Click on **'Refresh'** icon to update the dropdown list.

Assign Warehouse

- To assign a warehouse to the product, select a warehouse from the **'Warehouse'** dropdown list and click on **'Assign Warehouse'** button.
- You can also add a new warehouse for the product by clicking on **'Add Warehouse'** button.



- Thereafter click on **'Assign Warehouse'** button to add the warehouse to the list.
- Additionally, you can also manage warehouses (Add, View or Delete) by clicking on **'Warehouses'** button from the **'MANAGE WAREHOUSES'** module on the Products listing page.

Note: You cannot delete the **'Main'** warehouse and the warehouses containing product stocks.

Low Stock Management

- To enable low stock management, check the **'Enable Low Stock'** checkbox under **'Low Stock Management'**. By defining low stock for a product, one can filter product as low stock product and purchase order is created of it when product goes below the defined mark.

Low Stock Management

- Enable Low Stock ?
- Enable Alerts ?
- Enable Reordering ?

Minimum Stock * ?

Reordering Stock * ?

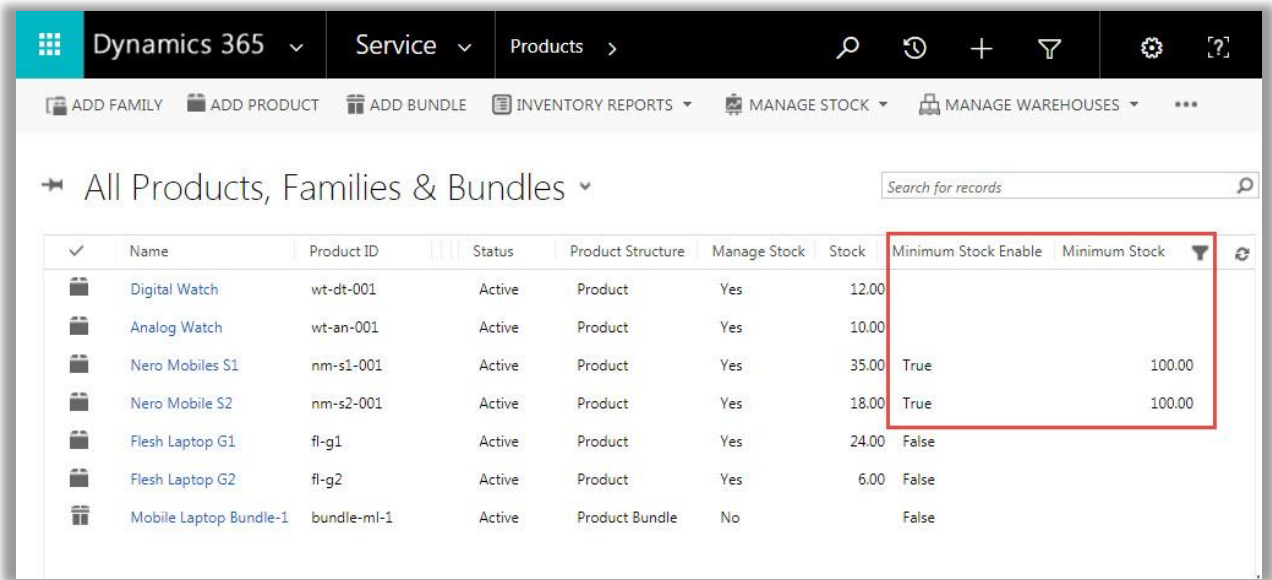
SAVE

- You can also enable alerts for low stock by checking the check box to 'Enable Alerts'. On enabling alerts, user gets message on opening the product detail page stating product to be in low stock.
- Product reordering can be also managed by enabling reordering option. By enabling this option, automatically PO is generated with assigned default supplier for the product.
- Mention low stock limit for that product in '**Minimum Stock**'.
- Mention reordering stock quantity for that product in '**Reordering Stock**'.
- Click on '**Save**' button.

Note: Reordering stock can be enabled only if product has price list associated with it and has default supplier assigned.

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- Once the low stock management is enabled for a product you will be able to filter out such products from the list view of products.

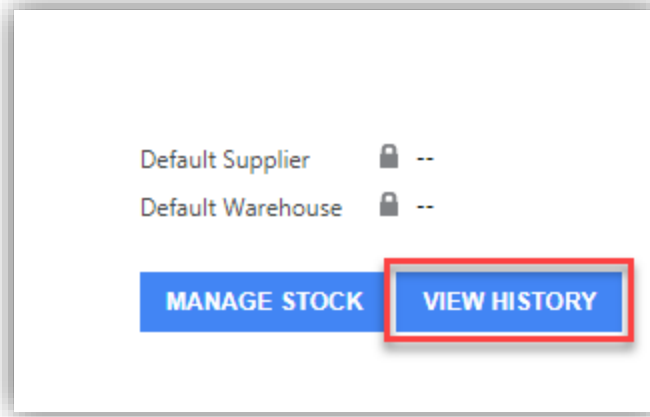


The screenshot displays the Dynamics 365 Sales interface for the 'Products' view. The table lists various products, including watches, mobile phones, and laptops. The columns 'Minimum Stock Enable' and 'Minimum Stock' are highlighted with a red box, indicating that these settings are used for filtering products based on low stock management.

Name	Product ID	Status	Product Structure	Manage Stock	Stock	Minimum Stock Enable	Minimum Stock
Digital Watch	wt-dt-001	Active	Product	Yes	12.00		
Analog Watch	wt-an-001	Active	Product	Yes	10.00		
Nero Mobiles S1	nm-s1-001	Active	Product	Yes	35.00	True	100.00
Nero Mobile S2	nm-s2-001	Active	Product	Yes	18.00	True	100.00
Flesh Laptop G1	fl-g1	Active	Product	Yes	24.00	False	
Flesh Laptop G2	fl-g2	Active	Product	Yes	6.00	False	
Mobile Laptop Bundle-1	bundle-ml-1	Active	Product Bundle	No		False	

View Stock History

- You can view the stock transaction history of the product by clicking on **'View History'** button from the Product Details page under Stock Management Panel.



- This will open a new window displaying the Stock Transaction History of the product with full information of incoming and outgoing stocks.
- For serial numbers enabled products, you can view detailed transaction list of products along with serial numbers by clicking on Detailed Stock History button.

View History Of Product : Asus Nvidia Geforce

Stock 1.00
Inwards 2.00
Outwards 1.00

Select User
 Select Reason
 Select Inward/Outward

All selected (6)
 Search:

Select	Inward	Outward	Reason	Supplier	Customer	Description	Transaction Date/Time	Order Id	User	View Serial Numbers	View Warehouses
<input type="checkbox"/>	2.00	-	New Stock (Inward)	Appjetty	-	-	2018-09-29 01:22 PM	-	Garry Mcwan	<input type="button" value=""/>	<input type="button" value=""/>
<input type="checkbox"/>	-	1.00	Damage Stock (Outward)	Appjetty	-	-	2018-09-29 01:23 PM	-	Garry Mcwan	<input type="button" value=""/>	<input type="button" value=""/>

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- Also, there are buttons available to view serial numbers and warehouses for transactions for serial number products.
- You can filter the Transaction history in the following ways:
 - Date-wise: Select the date range between which you wish to view transactions.
 - User-wise: Select multiple users to get transaction details user wise.
 - Reason-wise: Select multiple reasons to filter list based on reasons selected.
 - Transaction-wise: Filters list based on inward or outward flow of products.

View History Of Product : ABS Filament 3D Printer 4 inch

+ Stock 48.00
Inwards 60.00
Outwards 12.00

To

Select User
Select Reason
Select Inward/Outward

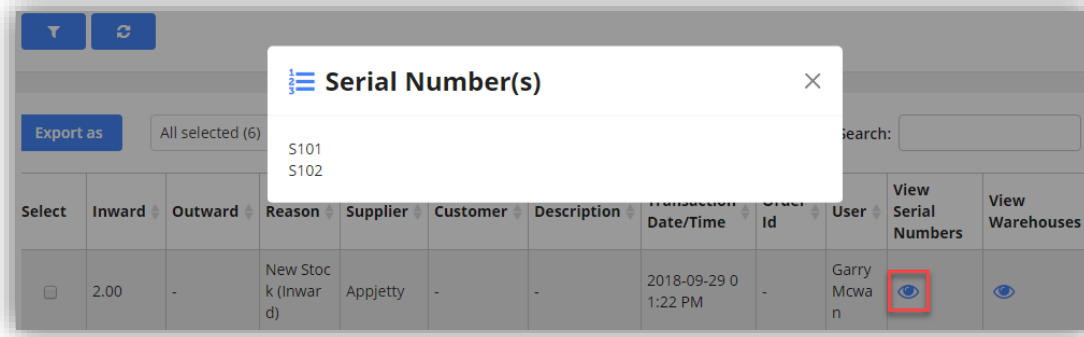
T
↻

Export as
All selected (6)
Search:

Select	Inward	Outward	Warehouse	Reason	Supplier	Customer	Description	Transaction Date/Time	Order Id	User
<input type="checkbox"/>	50.00	-	Biztech Inventory	New Stock (Inward)	A & E Corp	-	-	2018-09-24 10:45 AM	-	Garry Mcwan
<input type="checkbox"/>	-	5.00	Biztech Inventory	Damage Stock (Outward)	A & E Corp	-	-	2018-09-24 10:46 AM	-	Garry Mcwan
<input type="checkbox"/>	10.00	-	Main	Invoice Complete (Inward)	Appjetty	-	Invoice-5 Completed	2018-09-28 03:59 PM	-	Garry Mcwan
<input type="checkbox"/>	-	5.00	Main	RTS Items (Outward)	Appjetty	-	RTS Completed: Purchase Order Number-PO-8	2018-09-28 04:04 PM	-	Garry Mcwan
<input type="checkbox"/>	-	2.00	Main	Damage Stock (Outward)	Appjetty	-	-	2018-09-28 05:03 PM	-	Garry Mcwan

Showing 1 to 5 of 5 entries
Previous **1** Next

- To view the serial numbers of transaction, click on 'View' button under 'View Serial Number' column from the history of product. This will open a pop up containing a list of serial numbers of the products included in the transaction.

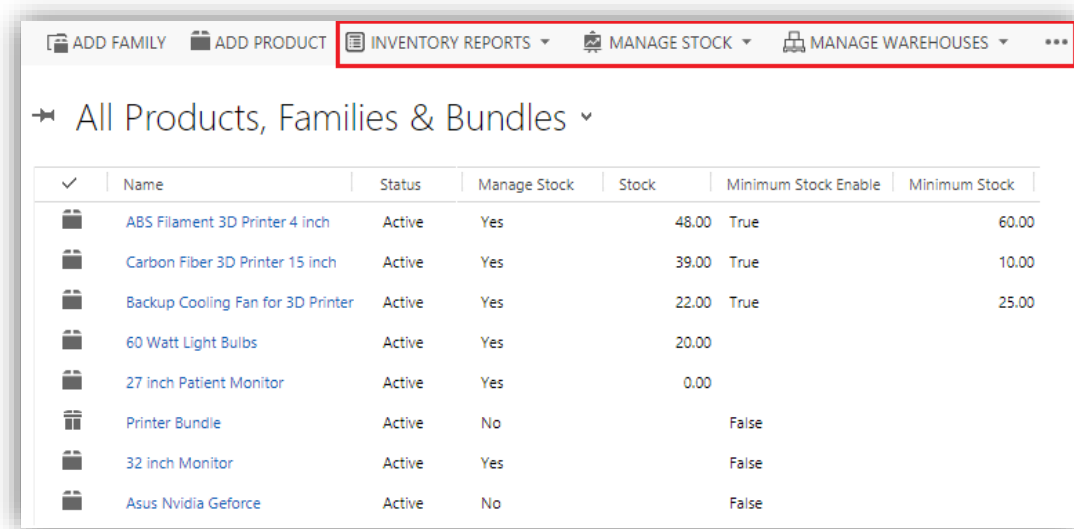


- You can view the Detailed Summary of product stock history by clicking on the '+' sign on the top-left corner.

- Stock 1.00		Inwards 2.00	Outwards 1.00	Detailed Stock History
Detailed Summary:				
New Stock (Inward)	2.00			
Order (Outward)	0.00			
Order Cancel (Inward)	0.00			
Damage Stock (Outward)	1.00			
Deleted By User (Outward)	0.00			
Warehouse Stock Transfer (Outward)	0.00			
Warehouse Stock Transfer (Inward)	0.00			
Invoice Complete (Inward)	0.00			
RMA Items (Inward)	0.00			
RTS Items (Outward)	0.00			
Duplicate (Inward)	0.00			

Product List Page

- On product list page, under product grid it displays whether manage stock and low stock is enabled for product or not. Also shows available stock and minimum stock level.



✓	Name	Status	Manage Stock	Stock	Minimum Stock Enable	Minimum Stock
	ABS Filament 3D Printer 4 inch	Active	Yes	48.00	True	60.00
	Carbon Fiber 3D Printer 15 inch	Active	Yes	39.00	True	10.00
	Backup Cooling Fan for 3D Printer	Active	Yes	22.00	True	25.00
	60 Watt Light Bulbs	Active	Yes	20.00		
	27 inch Patient Monitor	Active	Yes	0.00		
	Printer Bundle	Active	No		False	
	32 inch Monitor	Active	Yes		False	
	Asus Nvidia Geforce	Active	No		False	

- Inventory Reports fly out is available that contains Stock History and Inventory Status buttons.
- Manage Stock fly out has buttons for Transaction Reasons and Manage Stock.
- Manage Warehouses contains button warehouses and warehouses stock transfer.
- Charts: Warehouse Stock, Return Stock, and Available Stock.

Stock History

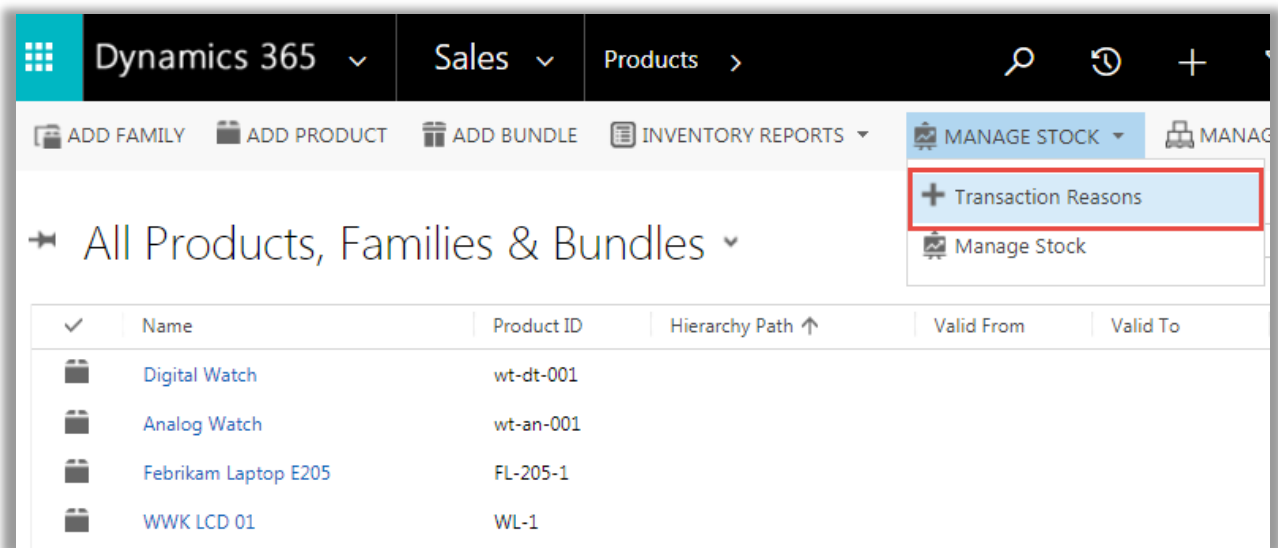
- Stock history will list the history of stock transactions for selected products.
- For products with serial numbers, it will provide button in Detail View column.
- For report generated, you can select columns that you wish to view. Certain columns are by default in the report and cannot be unselected.
- Report can be filtered, exported, searched and printed based on user need.

Inventory Status

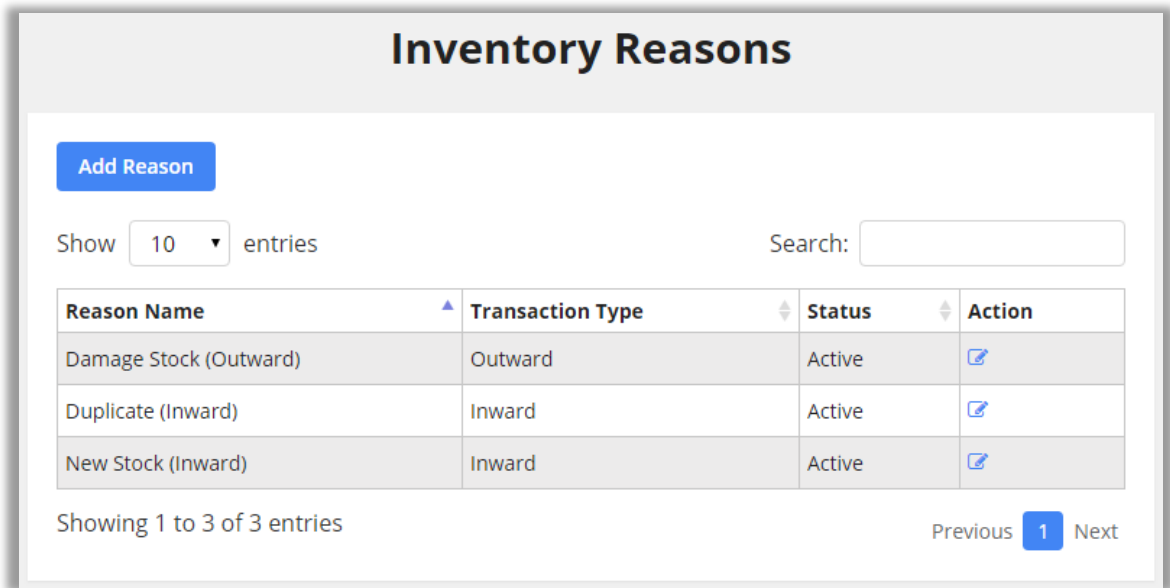
- Inventory Status option will show status of inventory for selected products.
- Under inventory status it shows Quantity on Hand, Quantity on Order, Total Quantity for the products.
- User can check detailed status for inventory containing list of serial numbers and its status along with reasons by clicking on Detail View button.

Transaction Reasons

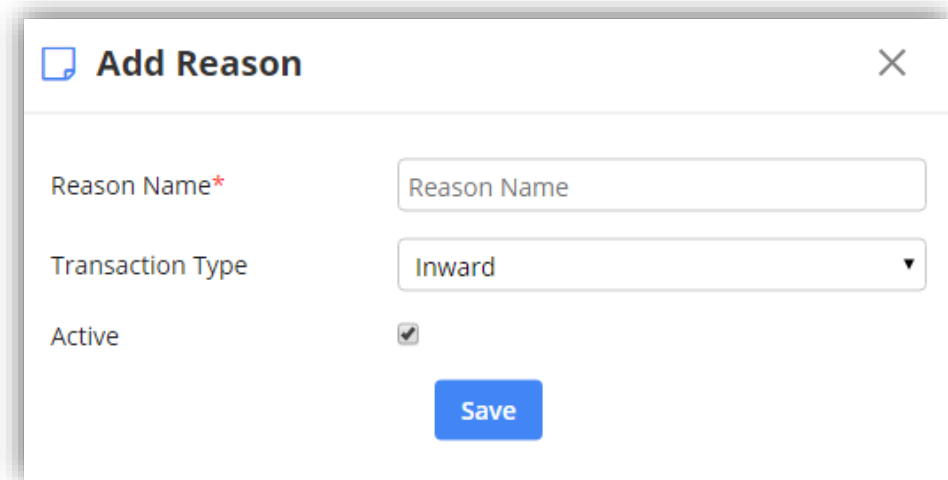
- To manage the reasons of transactions in your inventory, navigate to **'MANAGE STOCK'** from product listing page and click on **'Transaction Reasons'**.



- By clicking on **'Transaction Reasons'**, a new window screen will pop up containing a list of inventory reasons along with its details.



- Now to add an Inventory Reason click on **'Add Reason'** button, from top – left corner. After clicking on it a new section will be displayed above the Inventory Reasons section.
- Enter the name of reason in **'Reason Name'** text field; select the type of transaction from **'Transaction Type'** dropdown list and check the **'Active'** checkbox to activate the reason.



- Thereafter click on **'Save'** button to save the reason and by clicking on it, reason will be added to the list of Inventory Reasons and you will be notified with **'Reason added successfully'** message.
- You can also edit inventory reasons by clicking on **'Edit'** icon besides the particular inventory reason under **'Actions'** column.

Note: Transaction Reasons can also be added from ‘**Manage Stock**’ under ‘**MANAGE STOCK**’. In inventory reasons only, those reasons will be shown that are created by user itself.

Manage Stock

- To manage the stock of products, select the products from product listing page then go to ‘**MANAGE STOCK**’ and click on ‘**Manage Stock**’ button. By clicking on it, Manage Stock window will pop up on your screen.

<input checked="" type="checkbox"/>	Product Name	Stock	Inwards	Outwards	Stock Status	Warehouse	Supplier
<input checked="" type="checkbox"/>	ABS Filament 3D Printer 4 inch	47.00	60.00	13.00	InStock	Biztech Inventi ▾	Select ▾

Warehouse/Supplier Quantity	Quantity	Reason	Description	Action
0	<input type="text" value="0"/>	Damage Stock ▾	<input type="text"/>	Save

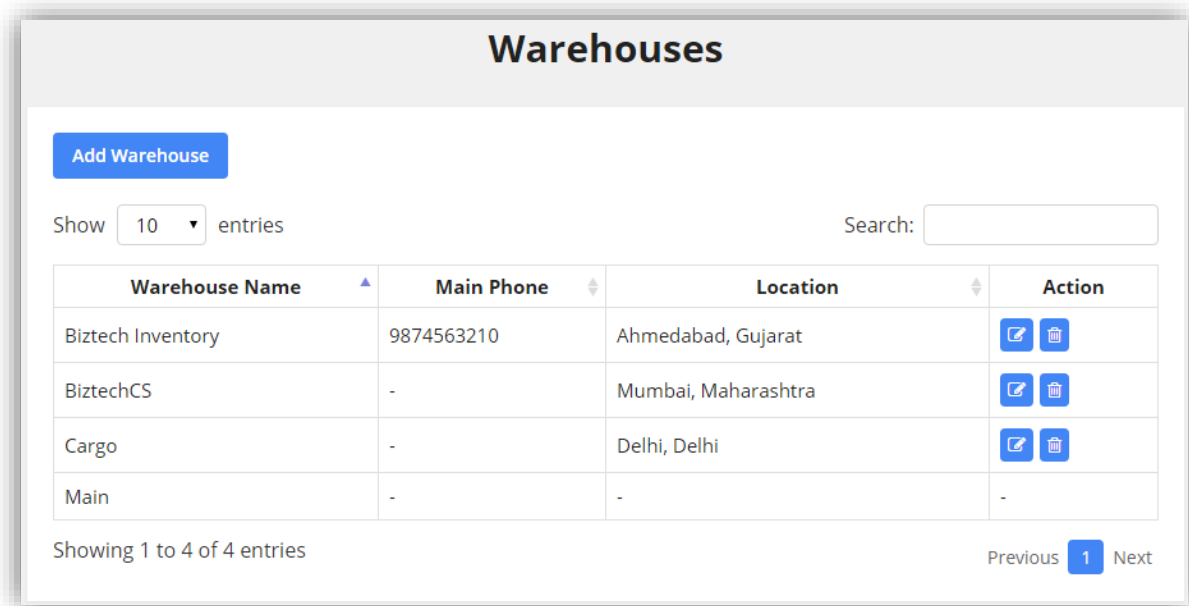
- Now you need to enter the quantity, select supplier, select warehouse, select the reason for the stock management and enter the description for managing the stock.
- Thereafter click on ‘**Save**’ button besides the stock to save the managed stock of only particular product and click on ‘**Save All**’ button to save the managed stocks of all the products.

Note:

- Stock cannot be managed for following:
 - i. Inactive or Family Products
 - ii. Products with Serial Number
- Warehouse column will only be displayed if ‘**Warehouse**’ module is enabled from Configuration Settings.

Warehouse

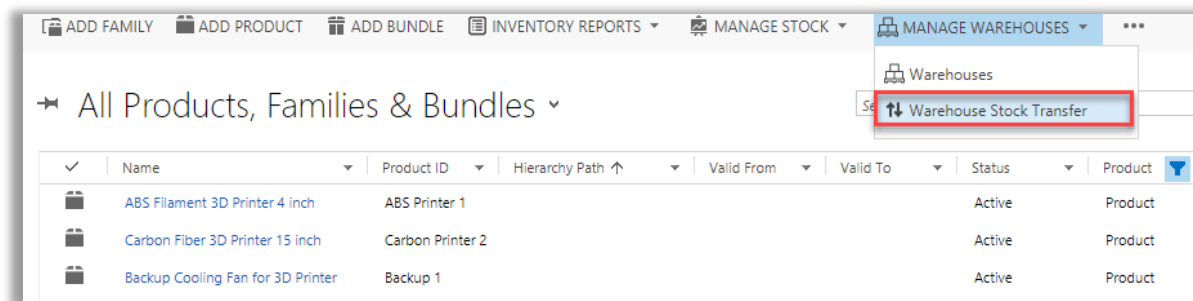
- Clicking on warehouse option under manage warehouse get list of warehouses. From the list itself user can add, edit, delete warehouse



Note: Main warehouse cannot be edited or deleted. Also, warehouse can't be deleted if it is having stock.

Warehouse Stock Transfer

- To transfer the stock of one warehouse into another click on **'Warehouse Stock Transfer'** button under **'MANAGE WAREHOUSES'** module in Products listing page after selecting products.



- By clicking on **'Warehouse Stock Transfer'** button you will be presented with the Warehouse Stock Transfer screen.

Transfer Serial Number Products

- To transfer the products with serial number, select the **'Serial Number Products'** option from **'Select Product Type'** dropdown list. A list of products with serial numbers will be displayed.

Warehouse Stock Transfer

Warehouse From: **Warehouse To:** **Select Product Type:** **Select Supplier:**

Product Name **Quantity**

<input type="checkbox"/>	Products	Serial Number	Available Quantity	Selected Quantity
<input checked="" type="checkbox"/>	Backup Cooling Fan for 3D Printer	P3D1502	1	<input type="text" value="1"/>
<input checked="" type="checkbox"/>	Backup Cooling Fan for 3D Printer	P3D1503	1	<input type="text" value="1"/>
<input type="checkbox"/>	Backup Cooling Fan for 3D Printer	P3D15010	1	<input type="text" value="1"/>

- For product with serial number, you can also enter quantity and click on select button to select that many products.
- After selection of the products to be transferred, choose the **'Warehouse From'** (Warehouse from which the product is to be transferred) and **'Warehouse To'** (Warehouse to which the product is to be transferred) along with supplier selection.
- Click on **'Transfer'** button. By clicking on it, your selected serial number products will be transferred to the respective warehouses.

Transfer Non-Serial Number Products

- To transfer the non-serial number products, select the **'Non-Serial Number Products'** option from **'Select Product Type'** dropdown list. A list of products without serial numbers will be displayed.

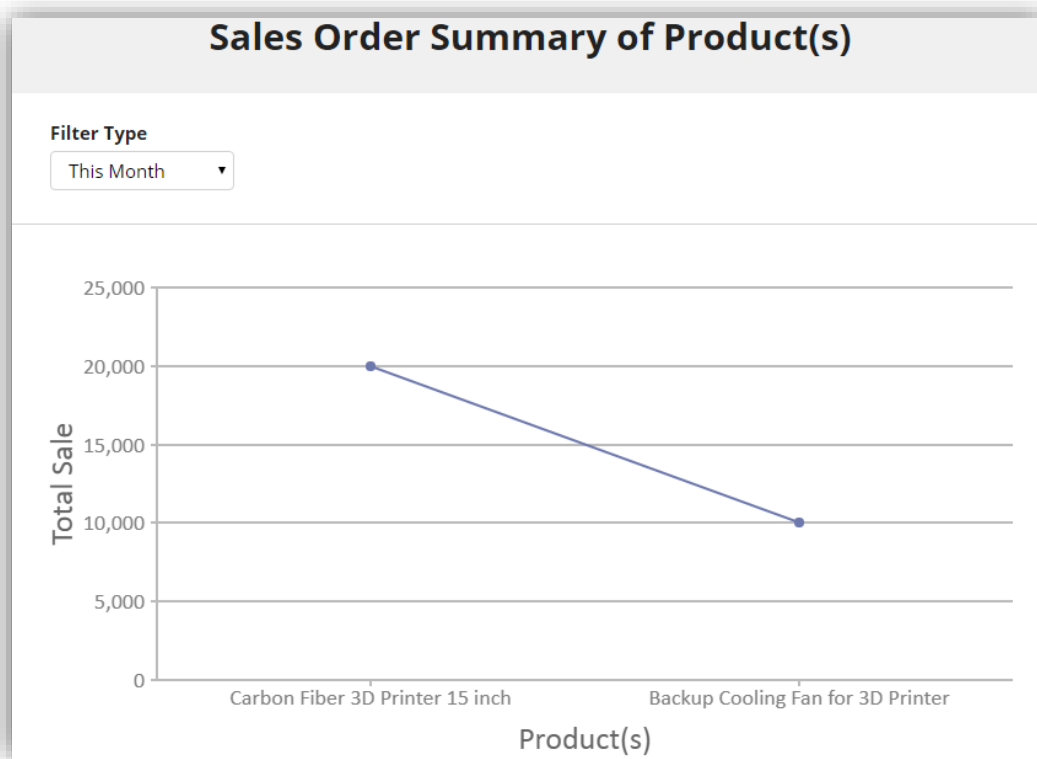
<input type="checkbox"/>	Products	Available Quantity	Selected Quantity
<input type="checkbox"/>	ABS Filament 3D Printer 4 inch	45	45

- Now select the products to be transferred and choose the **'Warehouse From'** (Warehouse from which the product is to be transferred) and **'Warehouse To'** (Warehouse to which the product is to be transferred) along with supplier selection.
- Click on **'Transfer'** button. By clicking on it, your selected non-serial number products will be transferred to the respective warehouses.

Note: List of products will be shown on basis of combination of warehouse and supplier selection.

Order Summary

- To get order summary of the products, select the products and click on View Order Summary.
- You get graphical representation (line chart) of product selling along with tabular data showing quantity sold and total sale amount.
- Users can also filter data based on period like: This month, This week, This year, Last month, Last week, Last year.



Show 10 entries

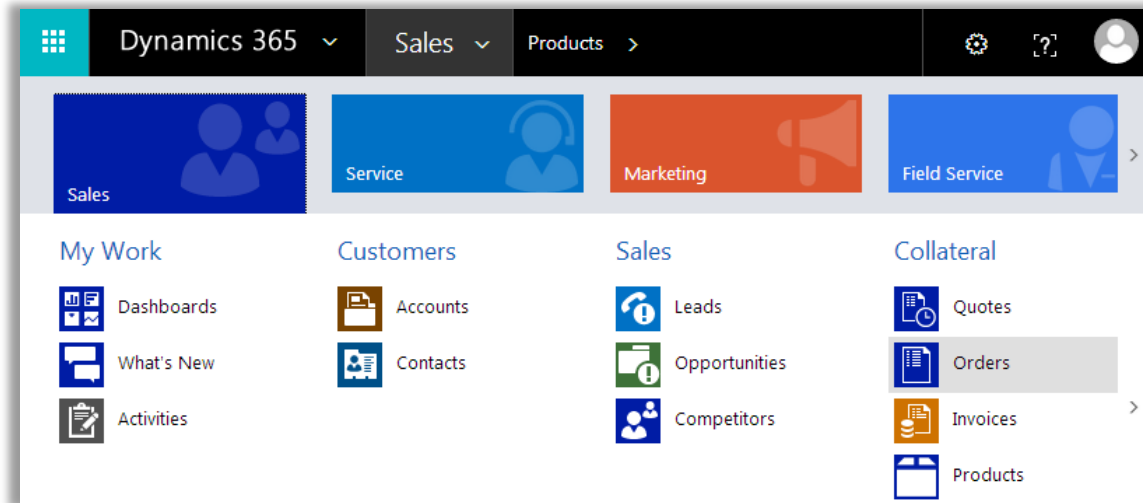
Product Name	Quantity Sold	Total Sale
Backup Cooling Fan for 3D Printer	20	\$10000
Carbon Fiber 3D Printer 15 inch	25	\$20000

Showing 1 to 2 of 2 entries

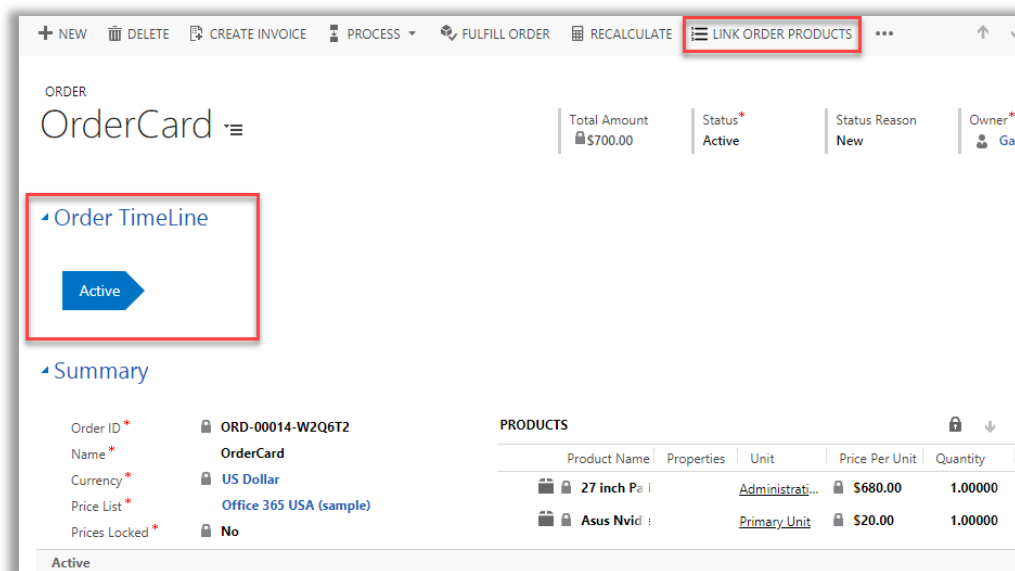
Previous 1 Next

Creating Sales Order

- To create a new Order, navigate to **Sales -> Orders**



- Now, click on **'New'** and enter details such as: Order Name, Currency, Value of Price List, Potential Customers etc.
- Once the order is created, select products with the help of look up and add them to the order. You can also add bundle (containing multiple product with multiple quantities) in your order. Also on order creation, order timeline is being maintained to let users know about their completed stages.
- Now in order to link serial numbers with the products and warehouses with the products without serial numbers, added in the order, click on **'LINK ORDER PRODUCTS'**.



- This will open a popup with the list of serial number products and list of non-serial number products.
- From **'LINK SERIAL NUMBERS PRODUCTS'**, select products which are to be linked and click on **'Link'** button.

Link Order Products

Link Serial Number Products -

<input type="checkbox"/> Name	Serial No	Warehouse	Supplier
<input type="checkbox"/> Asus Nvidia Geforce	S101	Biztech Inventory	Appjetty

Link Non Serial Number Products -

Name	Quantity	Select Warehouse	Warehouse/Supplier
27 inch Patient Monitor	1	Select	

- Thereafter select the quantity per warehouse from **'Select Warehouse'** column under **'LINK NON-SERIAL NUMBERS PRODUCTS'** section and click on **'Save'** button.

Select Warehouse✕

Product Name: 27 inch Patient Monitor
Required Qty: 1

Warehouse	Supplier	Available Quantity	Enter Quantity
Biztech Inventory	A & E Corp	0	<input style="width: 90%;" type="text" value="1"/>
Cargo	AGS	0	<input style="width: 90%;" type="text"/>

Selected Quantity: 1

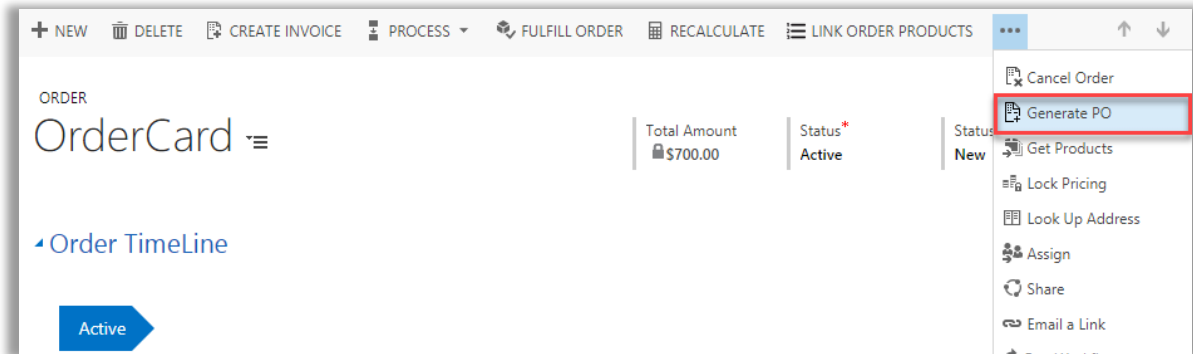
Save

Note:

- i. It will display products for which Serial Number is enabled under **LINK SERIAL NUMBER PRODUCTS** section and it will display products without Serial Number under **LINK NON-SERIAL NUMBER PRODUCTS** section.
- ii. Warehouse selection section will only be displayed if Warehouse module is enabled from the Configuration Settings.
- iii. For linking products, selection of products should be same as quantity entered.

Generating Purchase Order

- After adding the products, to generate the Purchase Order click on **'Generate PO'** which is available at more options on the CRM ribbon as shown below:



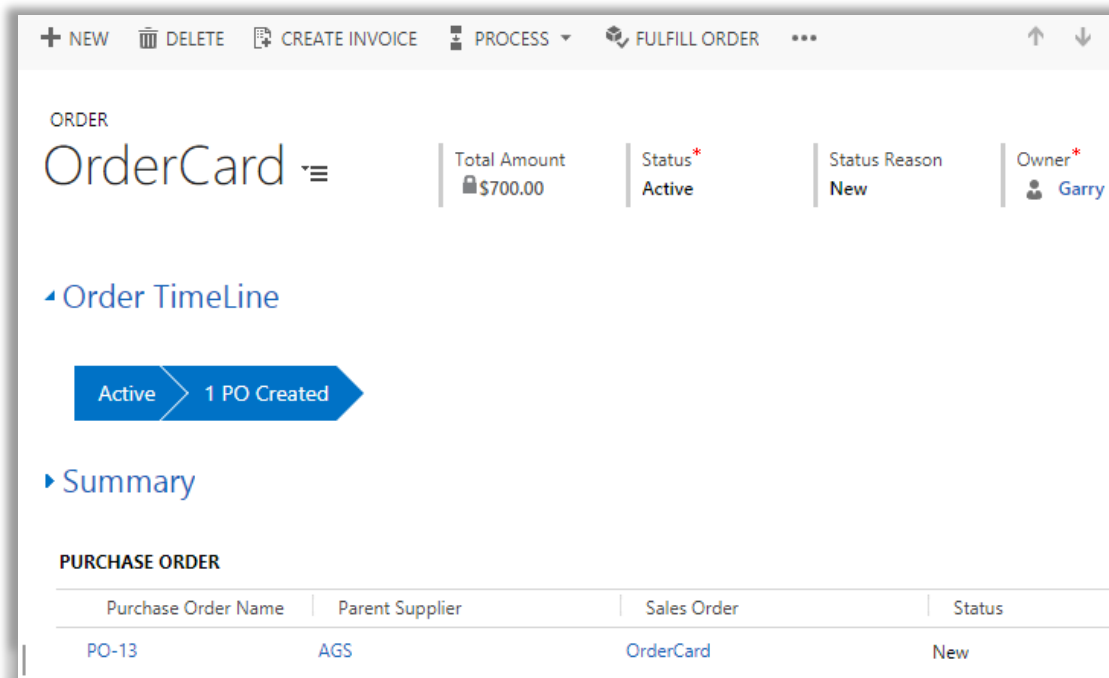
- Clicking on **'Generate PO'** will open a new window in which you can select supplier for each product.
- If you have already assigned a supplier to a product then that supplier will be selected by default and if you want to change the supplier, then you can select a supplier from the dropdown list.

Create Purchase Order

	Product Name	Price Per Unit	Quantity	Extended Amount	Supplier
<input type="checkbox"/>	27 inch Patient Monitor	680.00	1.00	680.00	AGS
<input type="checkbox"/>	Asus Nvidia Geforce	20.00	1.00	20.00	Select

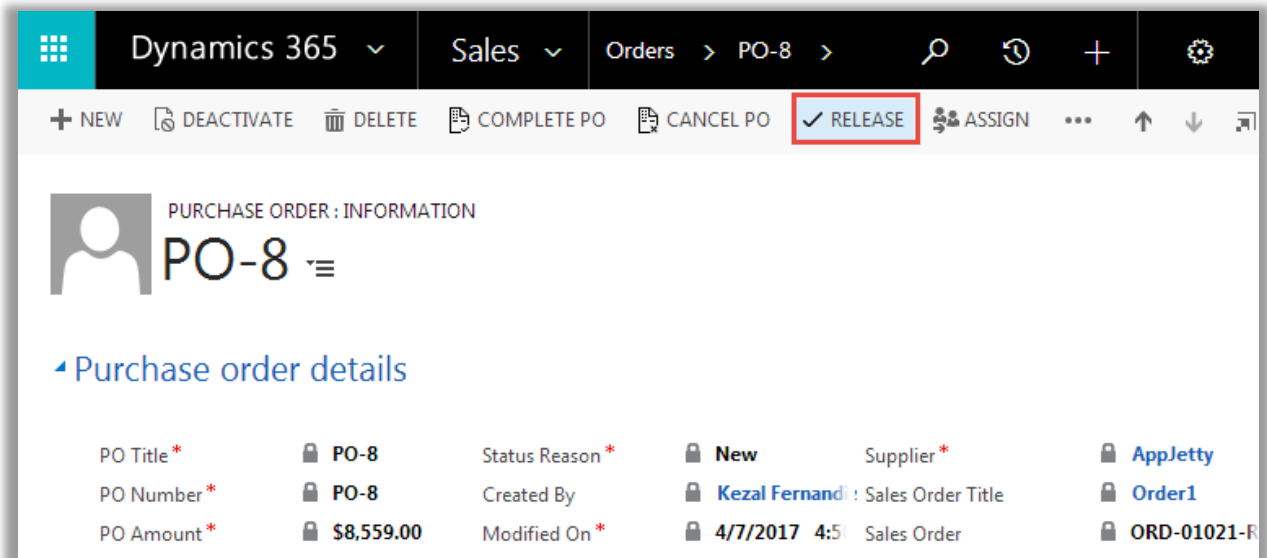
Create PO
Add Supplier

- You can also add a new supplier by clicking on **'Add Supplier'** button.
- Select the products and click on **'Create PO'** button. This will create a Purchase Order based on the selection of suppliers and a success message will appear. Click on **'OK'** button to continue
- Once a P.O is generated, it will be displayed on the order page as shown in reference screen below. Purchase Orders will be created, and visible as created PO's as shown below. Also order timeline will be updated.

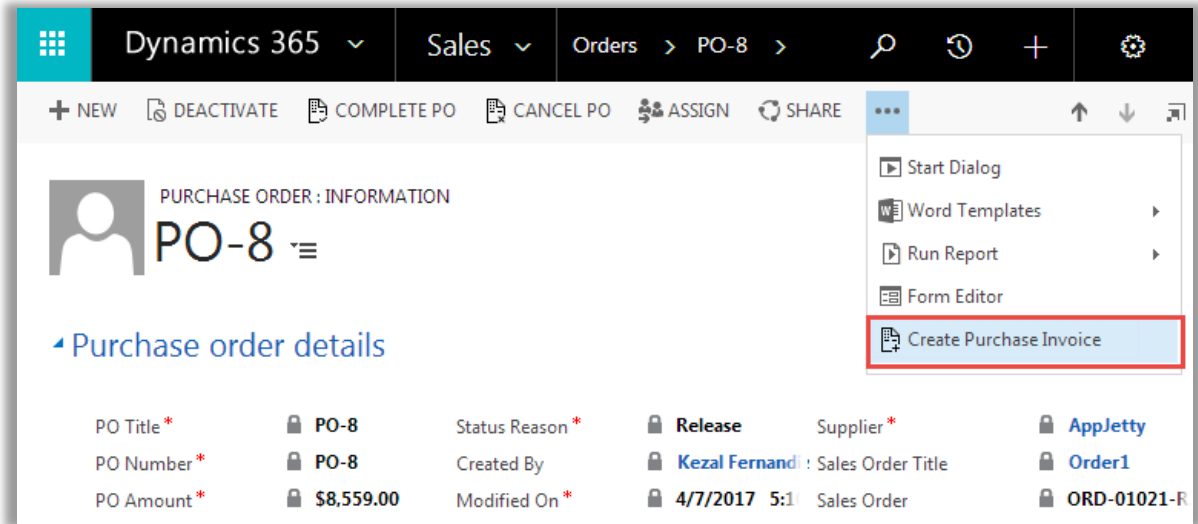


Creating Purchase Invoice

- To create a Purchase Invoice, go to the Purchase Order detail page and click on **'RELEASE'** to release the Purchase Order and enable Purchase Invoice Option



- Now, click on **'Create Purchase Invoice'** from more options as shown below.



- This will open up a new window in which you can enter the quantity received from your supplier or change price if it is different.

Create Purchase Invoice

Product Name	Price	Quantity	Received Quantity	Invoice Quantity	Amount
27 inch Patient Monitor	680.00	1.00	0.00	1.00	680.00

Detail Amount	680.00
(-)Discount(%)	{--}
(-)Discount	{--}
Pre-Freight Amount	680.00
(+)Freight Amount	{--}
Tax	{--}
Total Amount	680.00

[Create Invoice](#)

- Click on 'Create Invoice' button to create the purchase invoice.
- This will create a Purchase Invoice and a success message will appear. Click on 'OK' button to continue

USER MANUAL: Stock Management for Dynamics 365 Sales

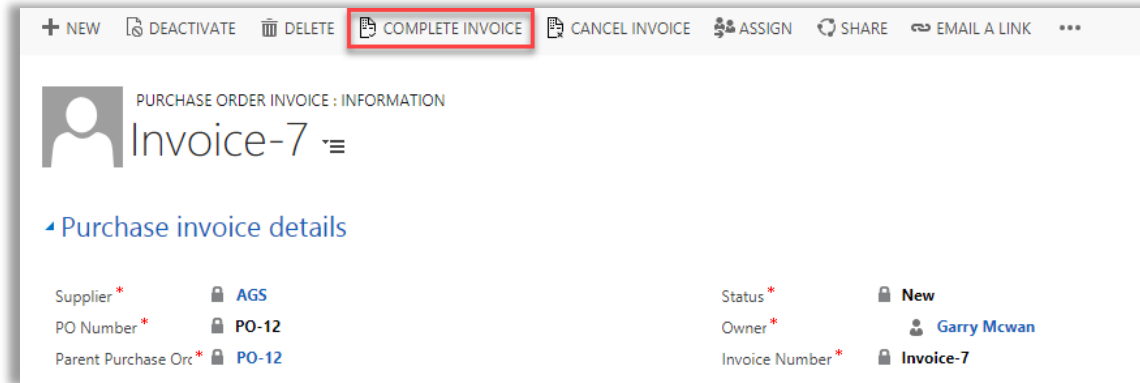
- Once a Purchase Invoice is generated, it will be displayed on the Purchase Order page as shown in reference screen below. Invoice will be created and visible as shown below.

The screenshot displays the Dynamics 365 user interface for a Purchase Order. The top navigation bar shows 'Dynamics 365' and 'PO-8'. Below the navigation bar, there is a toolbar with actions: '+ NEW', 'DEACTIVATE', 'COMPLETE PO', 'CANCEL PO', 'ASSIGN', 'SHARE', and a menu icon. The main content area is titled 'PURCHASE ORDER : INFORMATION' and shows 'PO-8'. Below this, there is a section for 'INVOICE' with a table listing the invoice details.

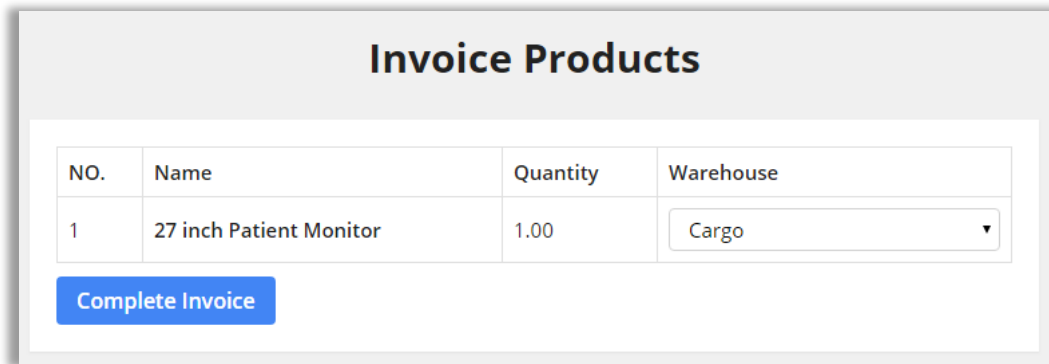
Invoice Number	Purchase Order Id	Supplier	Invoice Amount ↑	Status
Invoice-7	PO-8	AppJetty	\$8,559.00	New

Completing Invoice

- To complete an invoice, go to the detail view of an invoice and click on **'COMPLETE INVOICE'** as shown in the reference screen below.



- By clicking on **'COMPLETE INVOICE'** a pop up will appear displaying the Invoice Products along with its quantity.
- Select warehouse and click on **'Complete Invoice'**



Note: Warehouse selection from Warehouse Column will only be possible if Warehouse is enabled from Configuration Settings

- On completing the invoice, the quantity mentioned in the purchase order will be added in to the stock and the current stock gets updated automatically. Thereafter if you have enabled the Credit – Debit Module from Configuration Settings, it will track the financial transactions and inward or outward of the amount.

Stock Update on Order Fulfillment

- When you fulfill an Order from the Order Module, the stock for products included in that order will be automatically updated.

The screenshot shows the Dynamics 365 Order Form interface. At the top, a navigation bar includes buttons for '+ NEW', 'DELETE', 'CREATE INVOICE', 'PROCESS', 'FULFILL ORDER' (highlighted with a red box), 'RECALCULATE', and 'LINK ORDER PRODUCTS'. Below this, the order details for 'Product Order' are shown, including 'Total Amount' (\$680.00), 'Status' (Active), 'Status Reason' (New), and 'Owner' (Garry). The 'Order TimeLine' section displays a sequence of steps: Active, 1 PO Created, 1 PO Invoice Created, 1 PO Invoice Completed, and 1 PO Completed. The 'Summary' section provides key information: Order ID (ORD-00013-X0C5F9), Name (Product Order), and Currency (US Dollar). The 'PRODUCTS' table lists the following item:

Product Name	Properties	Unit	Price Per Unit	Quantity
Asus Nvid		Primary Unit	\$20.00	1.00000

- Similarly, when you cancel a Fulfilled Order for products which you have enabled stock management, the stock for that product will be updated automatically and the same will be displayed in the Stock Transaction History as well.
- Thereafter if you have enabled the Credit - Debit Module from Configuration Settings, it will track the financial transactions and inward or outward of the amount.

Generating RMA

- Once you have fulfilled the order you can create an RMA for the same. To create an RMA, go to the detail view of the order and click on 'Create RMA' button.

ORDER

Product Order

Total Amount: \$680.00 | Status: Fulfilled | Status Reason: Complete | Owner: Garry

Order Timeline: Active → 1 PO Created → 1 PO Invoice Created → 1 PO Invoice Completed → 1 PO Completed → Order Completed

Summary

Order ID: ORD-00013-X0C5F9

Name: Product Order

Currency: US Dollar

Product Name	Properties	Unit	Price Per Unit	Quantity
Asus Nvidia		Primary Unit	\$20.00	1.0000

- A new window will open up with a list of products which were included in the order.
- Now, select the products which are to be included in the RMA and enter the returned quantity.
- For serial number products, you can enter quantity and reason such that that many products are selected automatically with reason.

RMA Products

Product Name: Asus Nvidia Geforce | Quantity: 1 | Reason: Defective

Search:

<input type="checkbox"/>	Product Name	Serial Number	Warehouse	Supplier	Return Quantity	Unit Price	Total Amount	Reason
<input type="checkbox"/>	27 inch Patient Monitor	-	Biztech Inventory	A & E Corp	<input type="text" value="1.00"/>	680	680.00	<input type="text" value="Defective"/>
<input checked="" type="checkbox"/>	Asus Nvidia Geforce	S101	Biztech Inventory	Appjetty	<input type="text" value="1.00"/>	20	20.00	<input type="text" value="Defective"/>

Showing 1 to 2 of 2 entries

USER MANUAL: Stock Management for Dynamics 365 Sales

- Click on 'CREATE RMA', it will redirect you to RMA detail page. It will provide details of Sales Order, Shipping Details, Customer Name, Status etc.

Dynamics 365 RMA - Order - 1

DEACTIVATE DELETE COMPLETE ASSIGN SHARE EMAIL A LINK RUN WORKFLOW

RMA : INFORMATION

RMA - Order - 1

General

Name *	RMA - Order - 1	RMA Status	In Progress
Customer Name	AppJetty	RMA Amount	\$150.00
RMA Number	RMA-4		
Sales Order Number	ORD-01004-F3B7Y1		
Order Date	7/10/2017		
Owner *	Nil Gerry		

Ship To Address		Warehouse Address	
Name	Nil Garry	Name	Mark Spectere
Street1	C - 30011 Manhattan Towers	Street1	D 3001 Central Park
Street2	Near Iconic Towers	Street2	Near WB Bros.
Street3	--	Street3	--
City	Manhattan	City	Manhattan
Zip/PostalCode	985200	Zip/PostalCode	985200
State	New York	State	New York
Country	United States Of America	Country	United States Of America

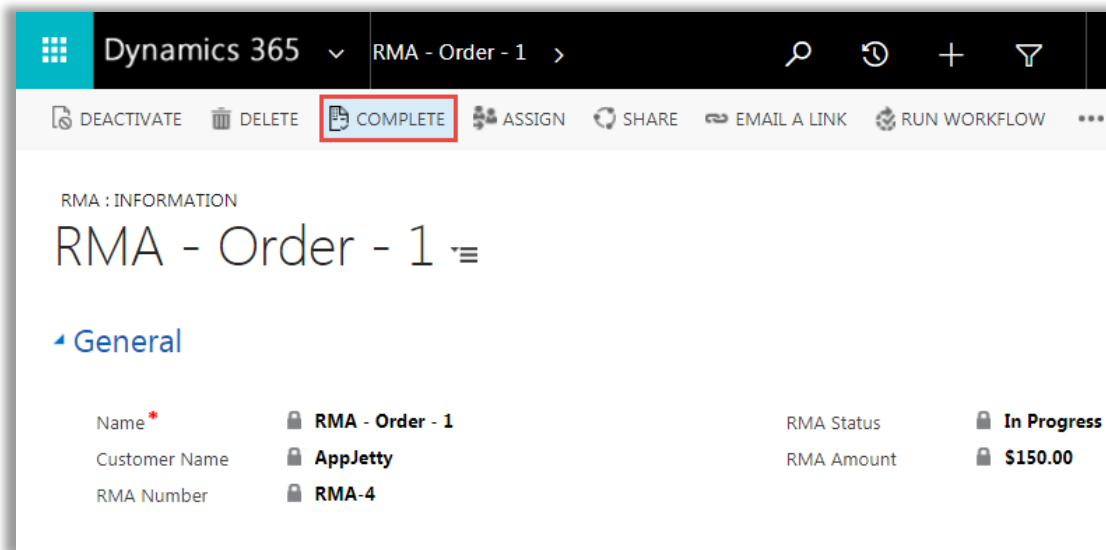
Products

Name	SerialNumber	Qty	Price	Return Amount	Description ↓
Product-11 prsr	prsr-11-11	1.00	\$30.00	\$30.00	Product is defective
Product-11 prsd		2.00	\$60.00	\$120.00	Wrong Product Sent

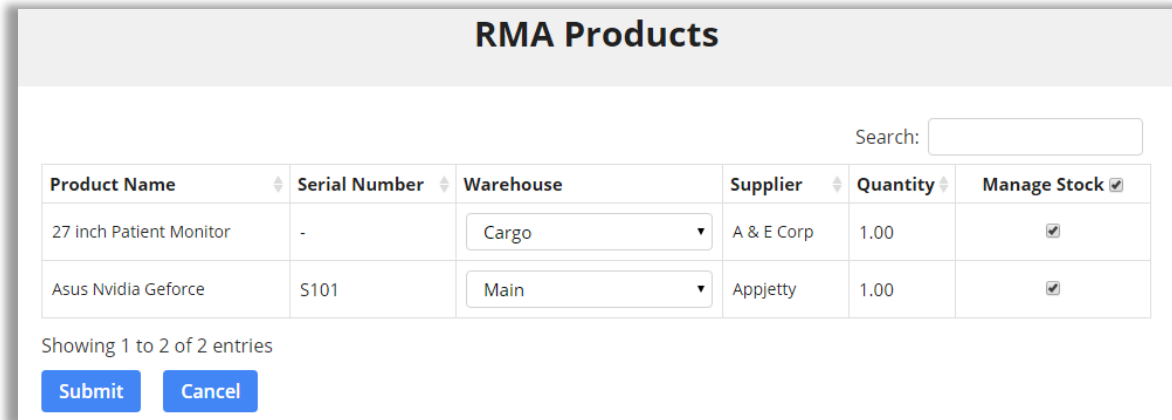
Active

Note: Shipping Address will be inherited from the Sales Order and you need to provide the Warehouse Address.

- To complete the RMA, click on '**COMPLETE**'. This will open a pop up containing the products selected for the RMA.



- Now to manage the stock of products included in RMA, select '**Managed Stock**' checkbox besides a product and click on '**Submit**' button to submit the RMA.

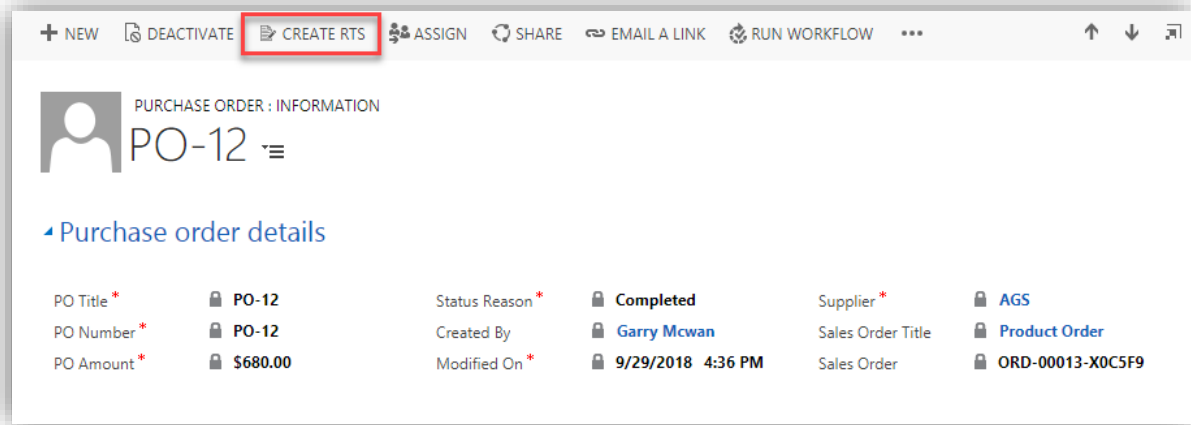


Note:

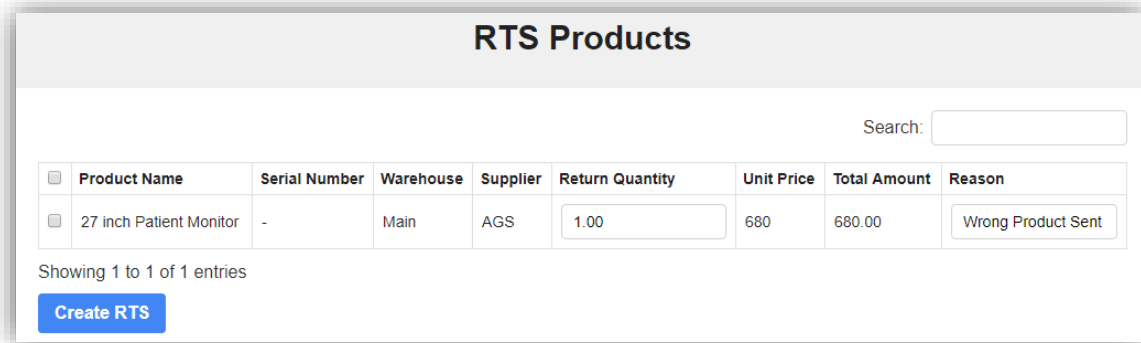
- Warehouse column will only be displayed if Warehouse module is enabled from Default Configuration Settings
 - Once the RMA is submitted you will not be able to manage the stock for products included in it.
- Thereafter the RMA will be listed in the particular order and can be viewed from the Order Detail Page. Also, If the Credit - Debit Module is enabled from Configuration Settings it will track the financial transactions and inward or outward of the product amounts.

Generating RTS

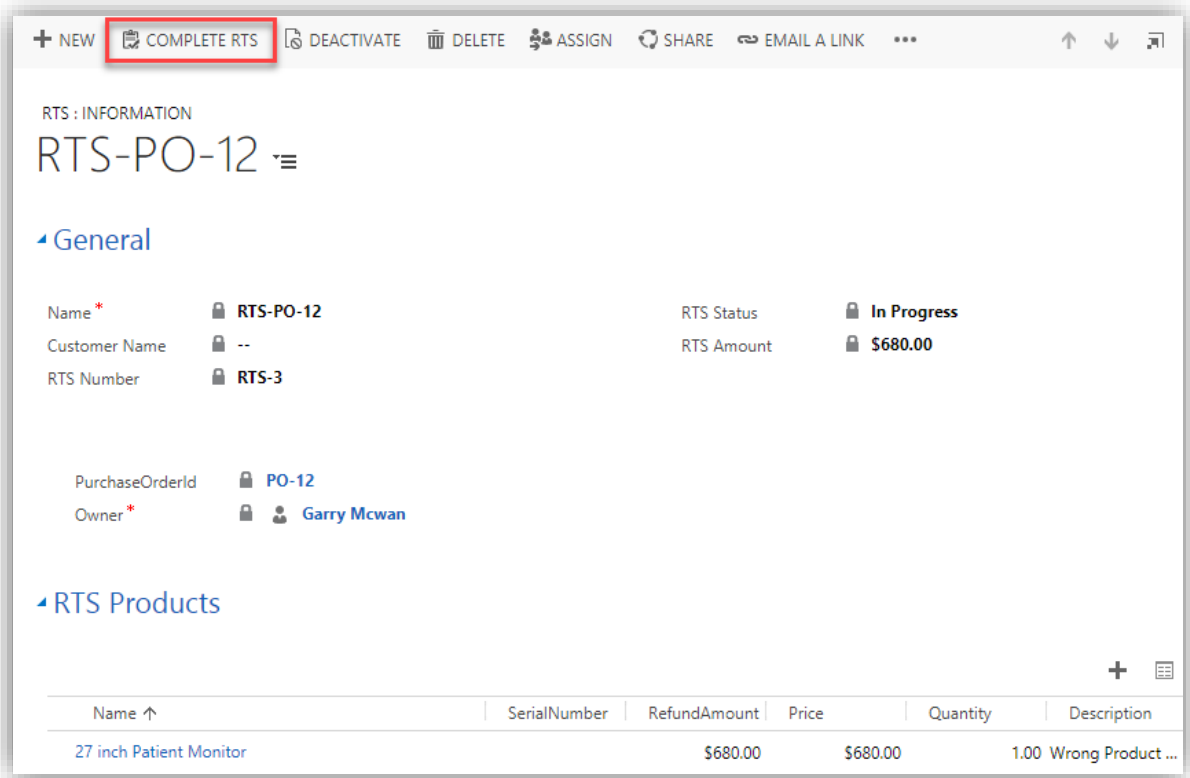
- Once purchase order has been fulfilled, you can create RTS for the same. To create RTS go to the detail page of Purchase Order and click on 'Create RTS' button.



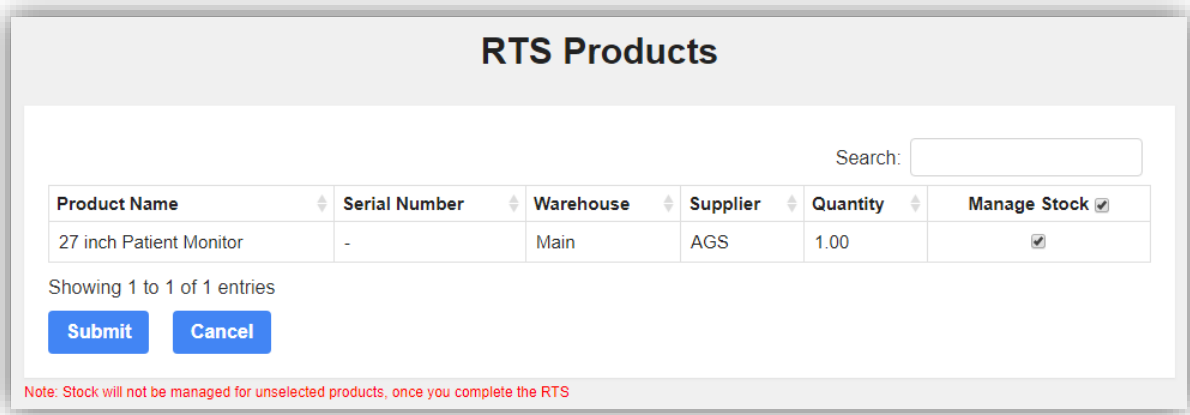
- New window will open with the listing of products included in purchase order. Select the products and enter reason for product return and click on 'Create RTS'.



- Upon RTS Creation, you are redirected to detail page of RTS where you can view products that are included in the RTS.



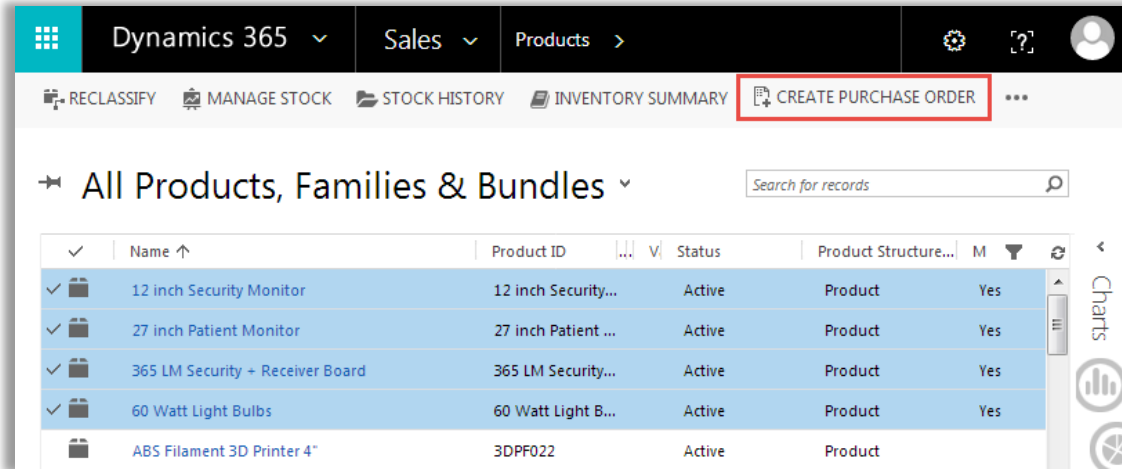
- Click on Complete RTS option to complete RTS. On completion of RTS and selection of manage stock option, stock will be outwarded from the inventory.



- Click on Submit button to complete the RTS process and view the RTS from the detail page of Purchase Order. Also If the Credit - Debit Module is enabled from Configuration Settings it will track the financial transactions and inward or outward of the product amounts.

Creating Manual Purchase Order

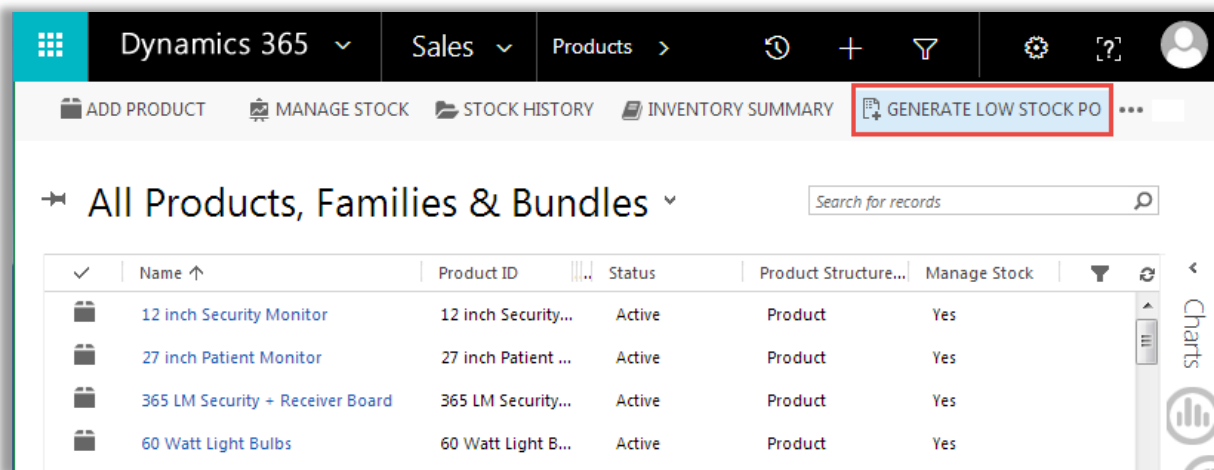
- You can also create purchase orders from the products grid view, using the **'CREATE PURCHASE ORDER'** option for the selected products.



Note: After generating the Purchase Order you can also create Purchase Order Invoice for the same.

Creating PO for Low Stock Products

- Purchase orders for low stock products will only include products in which Low Stock Management is enabled and products have reached their minimum quantity.



- To generate PO for low stock products, click on **'GENERATE LOW STOCK PO'** as shown in the reference screen.
- Clicking on **'GENERATE LOW STOCK PO'** will open up a new window in which you can select supplier for each product.

Create Purchase Order of Low Stock Products

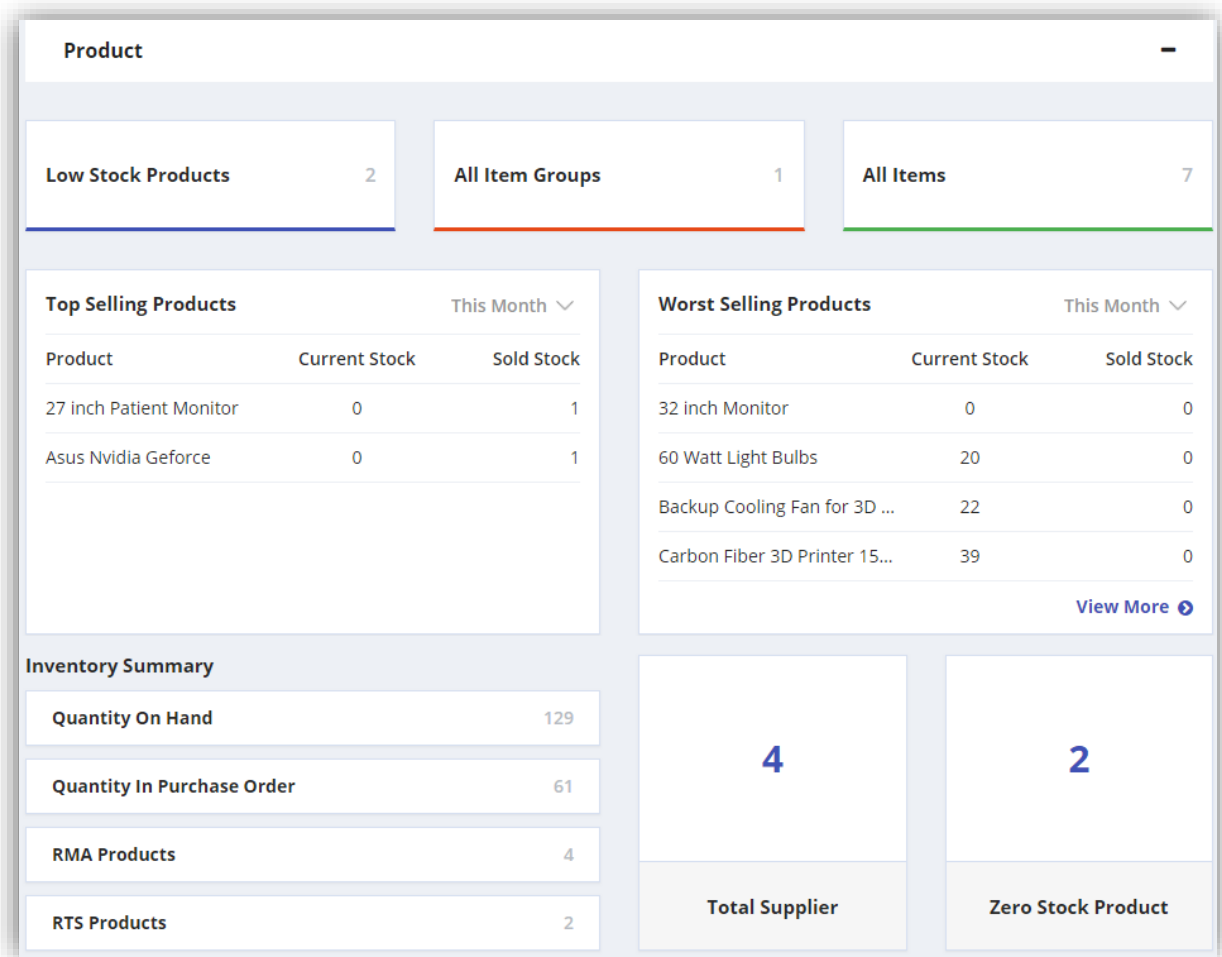
<input type="checkbox"/>	Product Name	Price Per Unit	Current Stock	Quantity	Minimum Quantity	Extended Amount	Supplier
<input type="checkbox"/>	ABS Filament 3D Printer 4 inch	<input type="text" value="950.00"/>	48.00	<input type="text" value="0"/>	60.00	0	Appjetty ▼
<input type="checkbox"/>	Backup Cooling Fan for 3D Printer	<input type="text" value="500.00"/>	22.00	<input type="text" value="0"/>	25.00	0	Appjetty ▼

- If you have already assigned a supplier to a product then that supplier will be selected by default and if you want to change the supplier then you can select from dropdown list.
- Clicking on '**Create PO**' button will create Purchase Orders based on the selection of suppliers and a success message will appear. Click on '**OK**' button to continue
- Follow the similar steps as above to create an invoice and complete the PO.
- On completing the Purchase Invoice, stock will be updated automatically.

Dashboard

- To access dashboard, navigate to Dynamics CRM -> AppJetty -> Dashboard
- Dashboard has been divided into three sections based on data shown in the dashlet.

Product



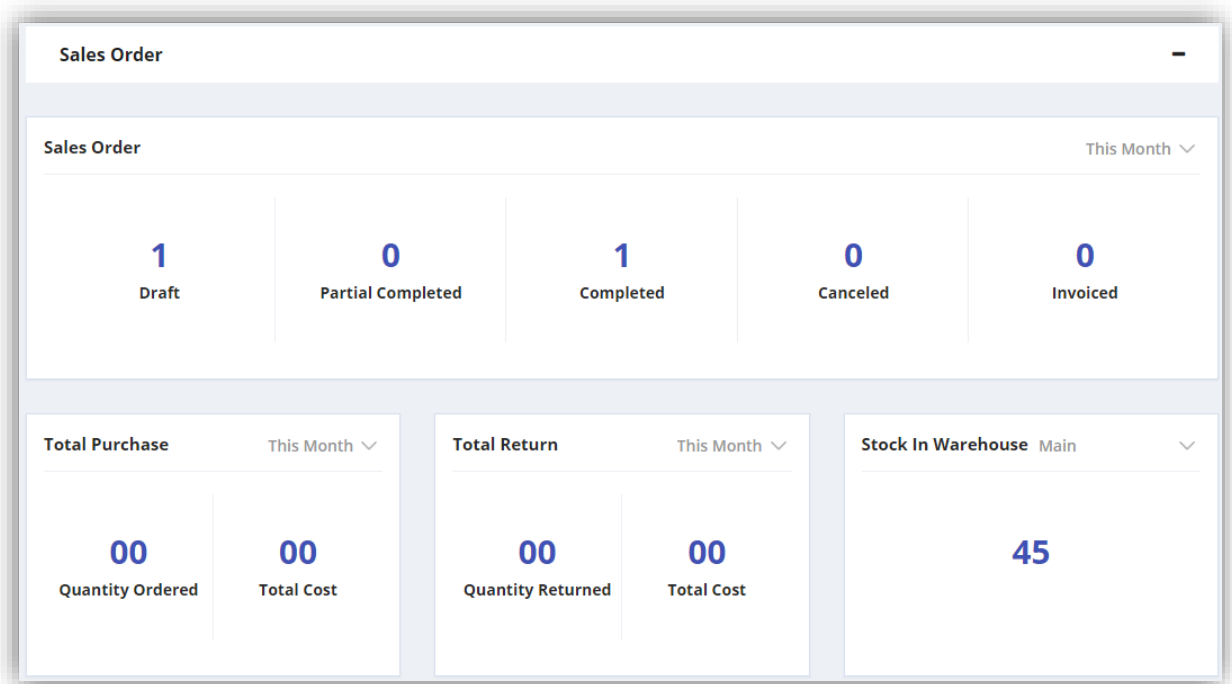
- Product dashboard displays summarized count and listing related to products.
- **Low stock products:** Get count of low stock products. On clicking count number get redirected to list of low stock products.

Product Name	Current Stock	Minimum Stock
ABS Filament 3D Printer 4 inch	48	60
Backup Cooling Fan for 3D Printer	22	25

- **All Item Groups:** This dashlet shows count of product bundles present in the inventory. On click of count, redirects to product bundles listing.
- **All Items:** This dashlet shows count of all products in the inventory. On click of count, redirects to product listing page.
- On dashboard you can also get to know top selling and worst selling products from the inventory based on product sales. This product list can be filtered on basis of period like this week, previous week, this month, previous month, this year and previous year.
- **Inventory Summary:** As part of inventory summary get count of your RMA products, RTS products, Quantity on Hand, Quantity in Purchase Order. Quantity in purchase order is count of products that are in order and are yet to be received.
- **Total Suppliers:** Get count and list of suppliers.
- **Zero Stock Product:** Get count of zero stock product and on click get redirected to data table listing all zero stock products.

Sales Order

- Sales Order dashboard provides summarized count related to sales order stages. This count can be viewed based on period selected.



- **Total Purchase:** Get count of total number of products that were purchased along with amount. This list can be filtered on basis of period like this week, previous week, this month, previous month, this year and previous year.
- **Total Return:** Get count of total number of products that were returned along with amount. This list can be filtered on basis of period like this week, previous week, this month, previous month, this year and previous year.
- **Stock in warehouse:** Get count of present stock in warehouse based on warehouse selected from the dropdown. On click of count get redirected to warehouse – inventory report.

Warehouse Product Details

Select Warehouse: Product Type:

[Export as](#) Search:

Select	Product Name	Total Inward	Total Outward	Quantity In Order	Quantity On Hand
<input type="checkbox"/>	ABS Filament 3D Printer 4 inch	10	7	0	3
<input type="checkbox"/>	Carbon Fiber 3D Printer 15 inch	11	0	0	11
<input type="checkbox"/>	27 inch Patient Monitor	1	0	0	1

Showing 1 to 3 of 3 entries Previous **1** Next

Purchase Order

- Purchase Order dashboard provides summarized count related to purchase orders and invoices.

Purchase Order

Recent Purchase Orders Invoices

- Invoice-8
- Invoice-7
- Invoice-6
- Invoice-5
- Invoice-4

[View More](#)

Recent Purchase Orders

- PO-13
- PO-12
- PO-11
- PO-10
- PO-9

[View More](#)

3

Active PO Invoices

4

Completed PO Invoices

1

Canceled PO Invoices

4

Total Product in Order

4

Completed Purchase Orders

1

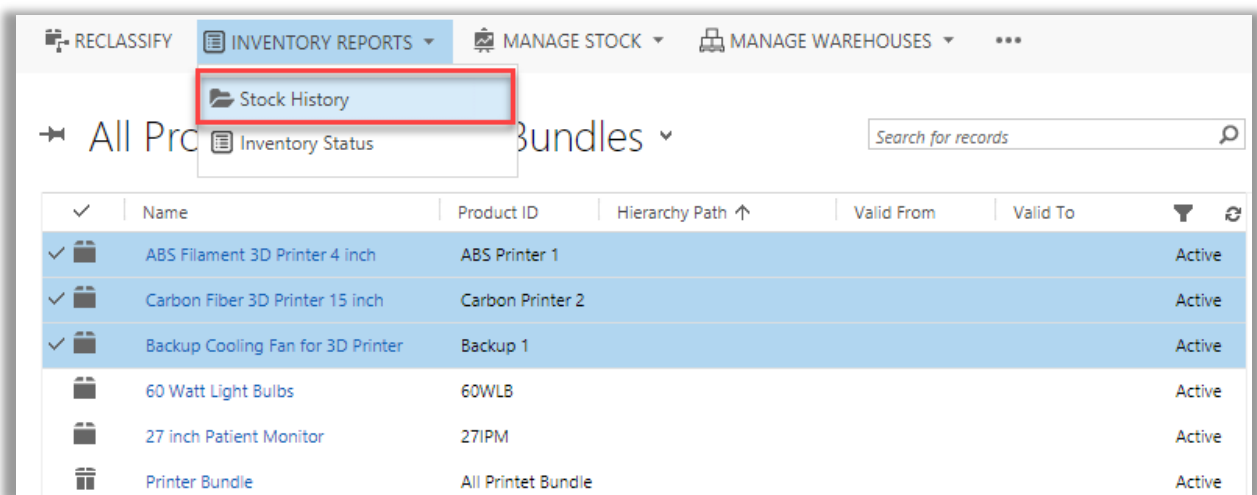
Canceled Purchase Orders

- Get listing of recent Purchase Orders Invoices and Recent Purchase Orders.
- Get count of Active PO Invoices, Completed PO Invoices and Canceled PO Invoices.
- **Total Product in Order:** This dashlet provides count of products for which purchase order has been created.
- Get count of Completed Purchase Orders and Canceled Purchase Orders.

Inventory Reports

Multiple Products Stock History

- **Stock History** allows users to view stock transaction history of multiple products with a single click. To generate multiple products Stock History, select products from the list and click on **'Stock History'** button from **'INVENTORY REPORTS'** in the Products listing page.



- This will open up a new window displaying Stock Transaction History for the selected products with full information of incoming and outgoing stocks along with their warehouses.
- You can filter the Stock Transaction History in the following ways:
 - Date-wise
 - User-wise
 - Reason-wise
 - Transaction-wise
 - Warehouse-wise
- You can also take a print out of the whole or selected records of stock history, export it to an excel sheet or csv file, copy records, print and download it as a PDF.

Stock History

From To

Select User

Select Warehouse

Select Reason

Select Inward/Outward

Filter Refresh

Export as
All selected (5)
Search:

Select	Product Name	Inward	Outward	Warehouse	Reason	Description	Transaction Date/Time	Order Id	User	Detail View
<input type="checkbox"/>	ABS Filament 3D Printer 4 inch	10.00	-	Main	Invoice Complete (Inward)	Invoice-5 Completed	2018-09-28 03:59 PM	-	Garry Mcwan	-
<input type="checkbox"/>	Carbon Fiber 3D Printer 15 inch	-	10.00	-	Order (Outward)	Order Fulfill - ORD-00002-H2T3W7	2018-09-24 11:54 AM	ORD-00002-H2T3W7	Garry Mcwan	-

Previous 1 2 3 4 5 6 Next

Note: Warehouse of serial number product for outward transaction won't be displayed as there can be multiple warehouse for different serial number product in single transaction.

- **Detailed View** allows users to view the detail history of the selected products including their inward / outward transaction history along with the serial number of each product. It also includes history of stocks along with the Transaction Date / Time and name of Supplier and Customer of the stocks.
- This will open a new window displaying Detailed Stock Transaction History for the selected products with detailed information of each inward and outward transaction.
- This report can be exported as pdf, csv or excel file. You can also copy and take print of selected or all records.

Detailed Stock History

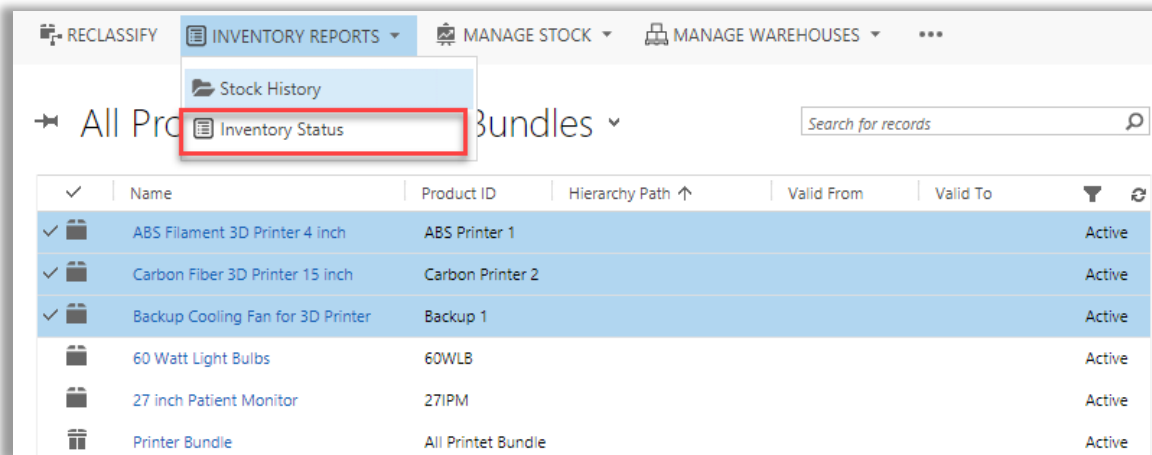
Export as
None selected ▼
Search:

Select	Product Name	Serial Number	Inward	Outward	Warehouse
<input type="checkbox"/>	Backup Cooling Fan for 3D Printer	P3D1501	1.00	-	Cargo
<input type="checkbox"/>	Backup Cooling Fan for 3D Printer	P3D1502	1.00	-	Cargo
<input type="checkbox"/>	Backup Cooling Fan for 3D Printer	P3D1503	1.00	-	Cargo
<input type="checkbox"/>	Backup Cooling Fan for 3D Printer	P3D1504	1.00	-	Cargo
<input type="checkbox"/>	Backup Cooling Fan for 3D Printer	P3D1505	1.00	-	Cargo
<input type="checkbox"/>	Backup Cooling Fan for 3D Printer	P3D1506	1.00	-	Cargo
<input type="checkbox"/>	Backup Cooling Fan for 3D Printer	P3D1507	1.00	-	Cargo
<input type="checkbox"/>	Backup Cooling Fan for 3D Printer	P3D1508	1.00	-	Cargo
<input type="checkbox"/>	Backup Cooling Fan for 3D Printer	P3D1509	1.00	-	Cargo
<input type="checkbox"/>	Backup Cooling Fan for 3D Printer	P3D15010	1.00	-	Cargo

Showing 1 to 10 of 10 entries
Previous 1 Next

Inventory Status

- **Inventory Status** allows users to view status of the Inventory with a single click. To generate Inventory Status report, select products from the list and click on **'Inventory Status'** button from **'INVENTORY REPORTS'** in the Products listing page.



- This will open up a new window displaying Inventory Status for the selected products with information like quantity on hand; quantity on order and total quantity and other details of each product.

Inventory Status

Export as
Search:

Select	Product Name	Quantity On Hand	Quantity On Order	Total Quantity	Detail View
<input type="checkbox"/>	ABS Filament 3D Printer 4 inch	48	0	48	-
<input type="checkbox"/>	Carbon Fiber 3D Printer 15 inch	64	0	64	-
<input type="checkbox"/>	27 inch Patient Monitor	1	0	1	-
<input type="checkbox"/>	32 inch Monitor	0	0	0	-
<input type="checkbox"/>	Backup Cooling Fan for 3D Printer	21	0	21	
<input type="checkbox"/>	60 Watt Light Bulbs	19	0	19	
<input type="checkbox"/>	Asus Nvidia Geforce	9	0	9	

Showing 1 to 7 of 7 entries Previous **1** Next

- To view the Detailed Inventory Status, click on 'Detailed View' button within the selected row.

Detailed Inventory Status

Export as
Search:

Select	Product Name	Serial Number	Status	Transaction Date/Time
<input type="checkbox"/>	Backup Cooling Fan for 3D Printer	P3DN1601	Available	2018-09-28 05:05 PM
<input type="checkbox"/>	Backup Cooling Fan for 3D Printer	P3DN1602	Available	2018-09-28 05:05 PM
<input type="checkbox"/>	Backup Cooling Fan for 3D Printer	P3DN1603	Available	2018-09-24 10:50 AM
<input type="checkbox"/>	Backup Cooling Fan for 3D Printer	P3DN1604	Available	2018-09-24 10:50 AM
<input type="checkbox"/>	Backup Cooling Fan for 3D Printer	P3DN1605	Available	2018-09-24 10:50 AM
<input type="checkbox"/>	Backup Cooling Fan for 3D Printer	P3DN1606	Available	2018-09-24 10:50 AM
<input type="checkbox"/>	Backup Cooling Fan for 3D Printer	P3DN1607	Available	2018-09-24 10:50 AM
<input type="checkbox"/>	Backup Cooling Fan for 3D Printer	P3DN1608	Available	2018-09-24 10:50 AM
<input type="checkbox"/>	Backup Cooling Fan for 3D Printer	P3DN1609	Available	2018-09-24 10:50 AM
<input type="checkbox"/>	Backup Cooling Fan for 3D Printer	P3DN16010	Available	2018-09-24 10:50 AM

Showing 11 to 20 of 53 entries
Previous 1 2 3 4 5 6 Next

- You can also take a print out of the whole or selected records of stock history, export it to an excel sheet or csv file, copy records, print and download it as a PDF.

Warehouse-Inventory Report

- To generate a Warehouse-Inventory Report, navigate to AppJetty > Warehouses under Stock Management section.
- Accessing this report, get warehouse wise stock details. Based on warehouse selection and product type user gets product detail along with Total Inward number, Total Outward number and Quantity on Hand for products.

Warehouse Product Details

Select Warehouse: Product Type:

[Export as](#) Search:

Select	Product Name	Total Inward	Total Outward	Quantity In Order	Quantity On Hand
<input type="checkbox"/>	Backup Cooling Fan for 3D Printer	31	12	18	19
<input type="checkbox"/>	Asus Nvidia Geforce	10	0	1	10

Showing 1 to 2 of 2 entries Previous **1** Next

- Report generated can be exported as csv, excel or pdf file, can be printed and copied as well.

Supplier-Inventory Report

- To generate a Suppliers-Inventory Report, navigate to AppJetty > Suppliers under Stock Management section.
- Through this report, get supplier wise stock details. Based on supplier selection and product type user gets product detail along with Total Inward number, Total Outward number and Quantity on Hand for products.

Supplier Product Details

Supplier: Product Type:

[Export as](#) Search:

Select	Product Name	Total Inward	Total Outward	Quantity In Order	Quantity On Hand
<input type="checkbox"/>	Backup Cooling Fan for 3D Printer	22	2	10	20
<input type="checkbox"/>	60 Watt Light Bulbs	20	0	1	20
<input type="checkbox"/>	Asus Nvidia Geforce	10	0	1	10

Showing 1 to 3 of 3 entries Previous **1** Next

- Report generated can be exported as csv, excel or pdf file, can be printed and copied as well.

Account Report

- **Account Report** allows you to view the complete summary of your Inventory account with the complete details of multiple modules like Order, Purchase Invoices, RMA, RTS, etc. It will also provide basic summary like Total Sales, Total Return, Total Purchase and Difference.
- To generate Account Report, navigate to **'Orders'** module and click on **'Account Report'** button from the Order Listing page.

Account Report

Total Sales	32300.00	Total Return	13400.00	Total Purchase	27780.00	Difference	-8880.00
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To

▼

↻

Export as

None selected ▼

Search:

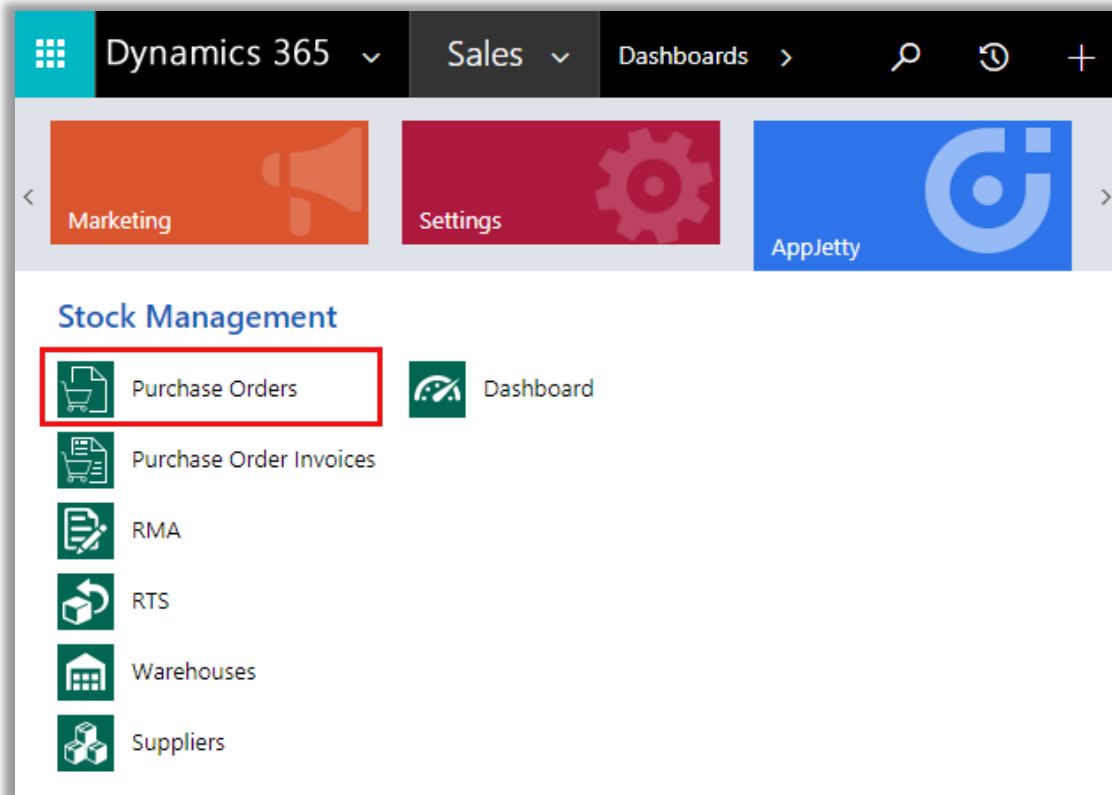
Select	Module	Module Id	Credit/Debit	Amount	View Detail
<input type="checkbox"/>	Purchase Invoice	Invoice-1	Debit	11800.00	View
<input type="checkbox"/>	Order	ORD-00000-Z0M2P1	Credit	13000.00	View
<input type="checkbox"/>	Order	ORD-00002-H2T3W7	Credit	10500.00	View
<input type="checkbox"/>	RTS	RTS-2	Credit	7250.00	View

Previous 1 2 Next

- You can view the details of any particular module from the Account Report by clicking on **'View'** button besides the particular module under the **'View Detail'** column.
- You can also do the column selection if you wish to view only certain selected columns in the list.
- Additionally, you can filter the account report date wise and along with that take a print out, export it to an excel sheet or csv, download it as a PDF, print as well as copy.

Generating Purchase Order Report

- To generate a Purchase Order Report, navigate to AppJetty > Purchase Order under 'Stock Management' section.

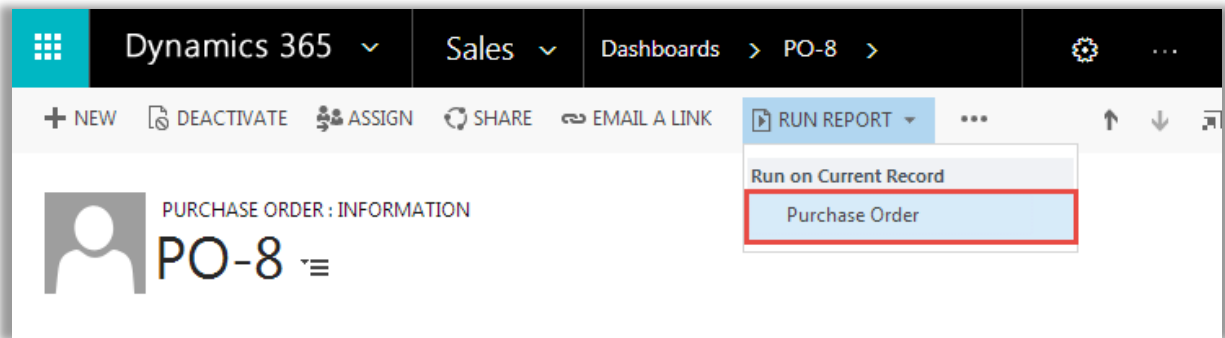


- A list of created purchase orders will be displayed.

The screenshot shows the 'Purchase Order' list view. The table displays the following data:

Purchase Order Number ↑	Parent Supplier	Sales Order	Status
PO-1	AppJetty		Complete
PO-2	AppJetty		Complete
PO-3	AppJetty	AppJetty Laptop Order	Complete
PO-8	AppJetty	Order1	Complete

- Go to Detail view of a Purchase Order to generate the report.
- Click on Run Report and select 'Purchase Order'.

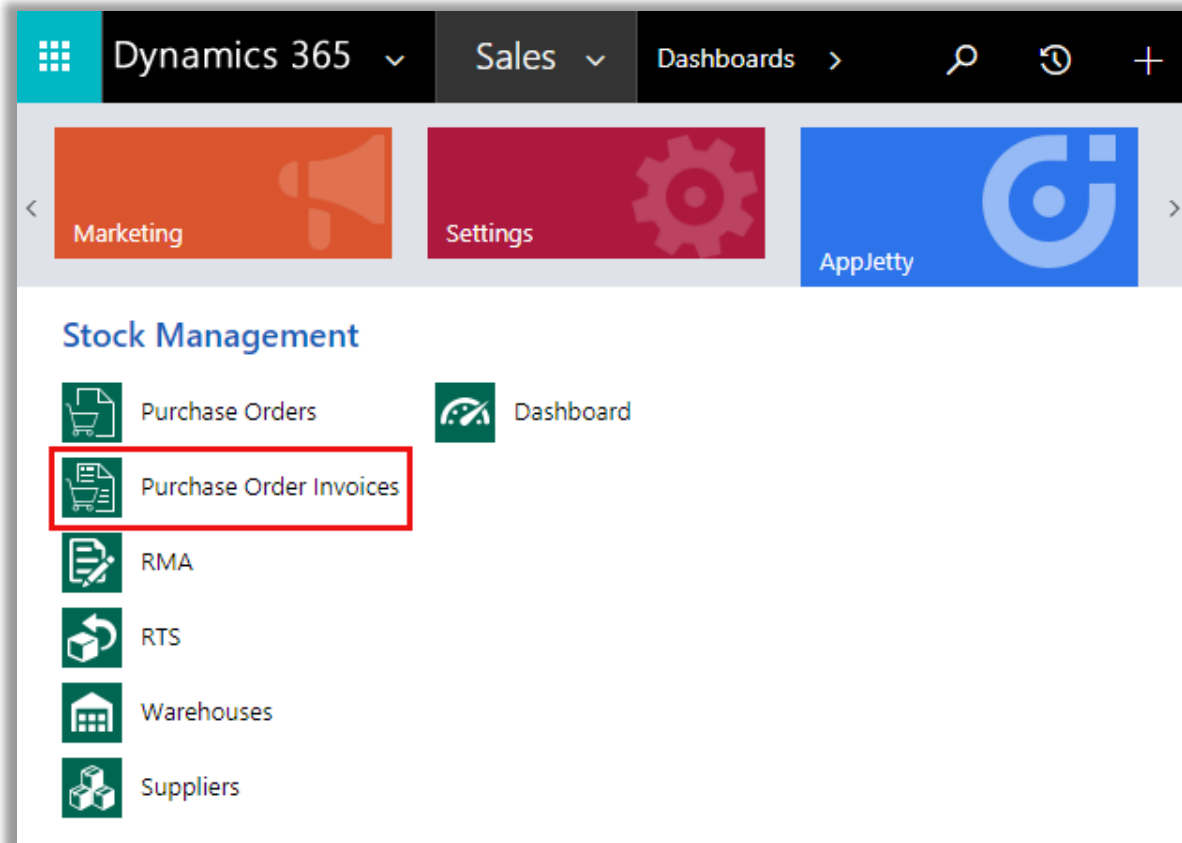


- You can also save the Reports in the following formats: XML, CSV, PDF, TIFF, Excel and Word.

Purchase Order : PO-8			
Summary			
Name:	PO-8	Status:	Complete
Purchase Order No:	PO-8	Order ID:	ORD-01021-R2R3J8
Supplier:	AppJetty	Sales Order:	Order1
Shipping Information			
Bill To:		Ship To:	
49 Logan Street		678 Land Gardens	
West Dockyard			
Gordens			
USA			
Details			
Product Name	Product Quantity	Product Price	Sub Total
ABS Filament 3D Printer 4"	1.00	\$500.00	\$500.00
Backup Cooling Fan for 3D printer	1.00	\$59.00	\$59.00
Carbon Fiber 3D Printer 15"	1.00	\$8,000.00	\$8,000.00
Total			\$8,559.00

Generating Purchase Order Invoice Report

- To generate a Purchase Order Invoice Report, navigate to AppJetty > Purchase Order Invoices under 'Stock Management' section.

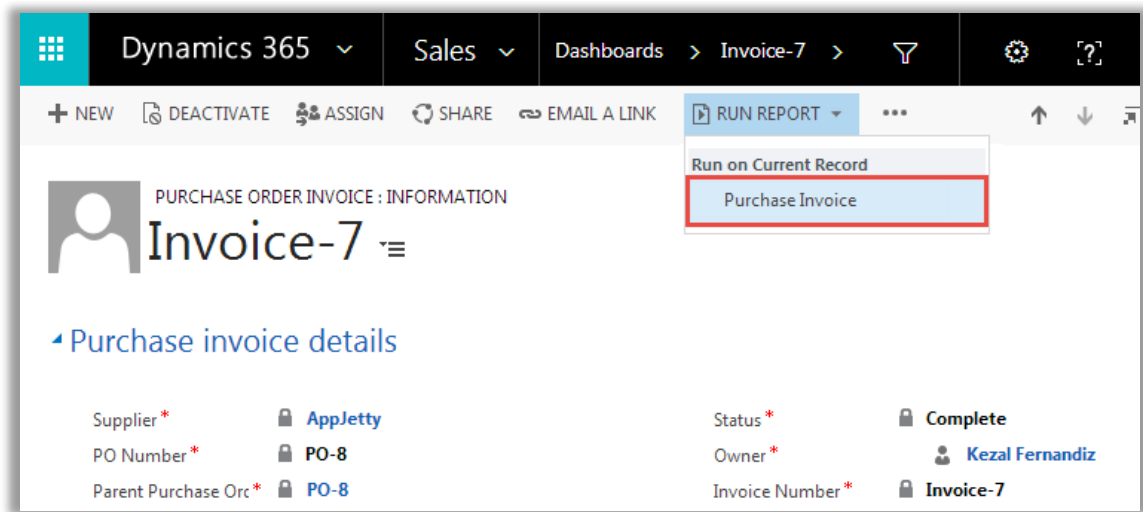


The screenshot shows the 'Active POInvoice' report in Dynamics 365. The report title is 'Active POInvoice' with a search bar to its right. Below the title is a toolbar with options: '+ NEW', 'DELETE', 'EMAIL A LINK', 'RUN REPORT', and 'EXCEL TEMPLATES'. The report data is presented in a table with the following columns: Invoice Number, Purchase Order Id, Supplier, Invoice Amount, and Status. The table contains four rows of data, with the last row highlighted in blue.

Invoice Number	Purchase Order Id	Supplier	Invoice Amount	Status
Invoice-1	PO-1	AppJetty	\$8,750.00	Complete
Invoice-2	PO-2	AppJetty	\$182,500.00	Complete
Invoice-3	PO-3	AppJetty	\$10,790.00	Complete
Invoice-7	PO-8	AppJetty	\$8,559.00	Complete

- Go to Detail view of a Purchase Order Invoice

- Click on Run Report and select 'Purchase Invoice'.

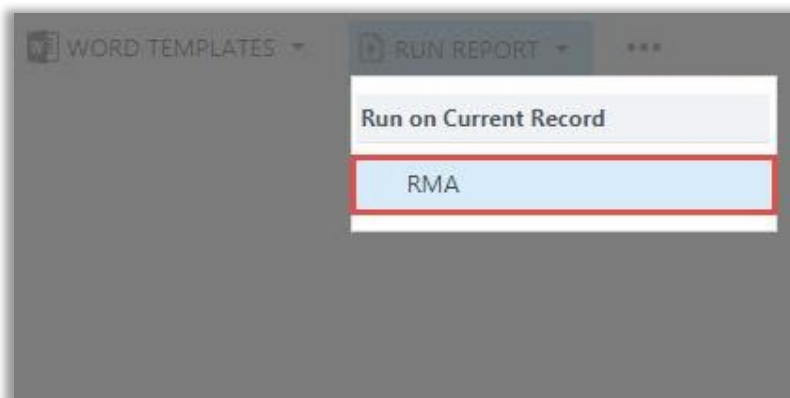


- This will open up a New Window with the 'Purchase Order Report'.
- You can save the Reports in the following formats: XML, CSV, PDF, TIFF, Excel and Word.

Invoice : Invoice-7			
Summary			
Name :	Invoice-7	Status :	Complete
Invoice No :	Invoice-7	Purchase Order No :	PO-8
Supplier :	AppJetty	Purchase Order :	PO-8
Shipping Information			
Bill To:		Ship To:	
843 New Fenway Park		981 Church Street	
		Burlington	
Boston Massachusetts USA		Vermont USA	
Details			
Product Name	Product Quantity	Product Price	Sub Total
ABS Filament 3D Printer 4"	1.00	\$500.00	\$500.00
Backup Cooling Fan for 3D printer	1.00	\$59.00	\$59.00
Carbon Fiber 3D Printer 15"	1.00	\$8,000.00	\$8,000.00
		Sub Total	\$8,559.00
		Discount(%)	0.00
		Discount	0.00
		Total Frieght Amount	\$8,559.00
		Frieght Amount	0.00
		Total Tax	0.00
		Total Amount	\$8,559.00

Generating RMA Report

- To generate a report for the RMA, navigate to the detail page of the RMA. Now click on 'Run Report' and select 'RMA'.



- You can also save the Reports in the following formats: XML, CSV, PDF, TIFF, Excel and Word.

RMA : RMA-1				
Summary				
RMA Number:	RMA-1			
Order Number:	ORD-00000-Z0M2P1			
Order Date:	9/24/2018			
Customer Name:	John Wick			
Shipping Information				
Shipped From:		Shipped To:		
RMA Products				
Product Name	Serial Number	Price	Quantity	Amount
Backup Colling Fan for 3D Printer	CoolB1966	\$500.00	1.00	\$500.00
Backup Colling Fan for 3D Printer	CoolB1967	\$500.00	1.00	\$500.00
Backup Colling Fan for 3D Printer	CoolB1968	\$500.00	1.00	\$500.00

Inventory Charts

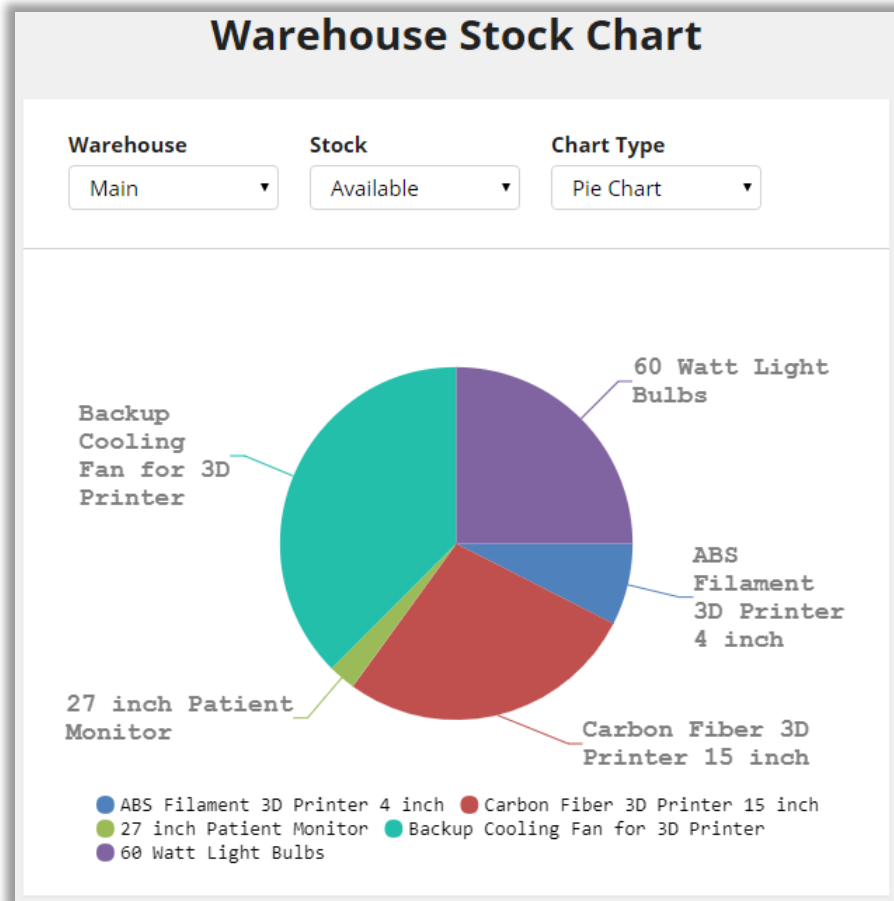
Warehouse Stock

- **Warehouse Stock** Chart displays a Bar Chart, Pie Chart and Line Chart for the stocks available and number of stocks sold from the warehouses of the selected products. A table is also displayed besides the Charts displaying the list of products along with their quantity (stock).
- User can also choose the Warehouse for which he/she wants to view the stock from **'Warehouse'** dropdown list.

Bar Chart



Pie Chart

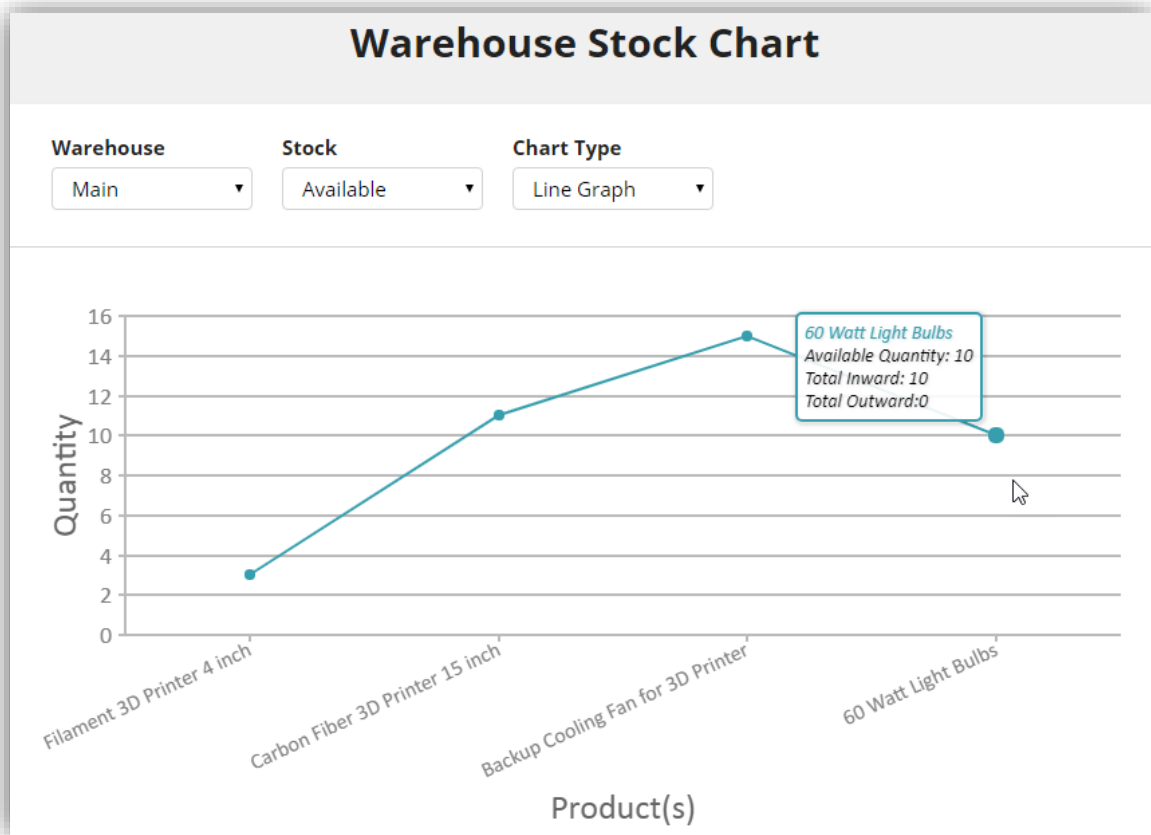


Show entries

Products	Stock
27 inch Patient Monitor	1
60 Watt Light Bulbs	10
ABS Filament 3D Printer 4 inch	3
Backup Cooling Fan for 3D Printer	15
Carbon Fiber 3D Printer 15 inch	11

Previous 1 Next

Line Chart



Show entries

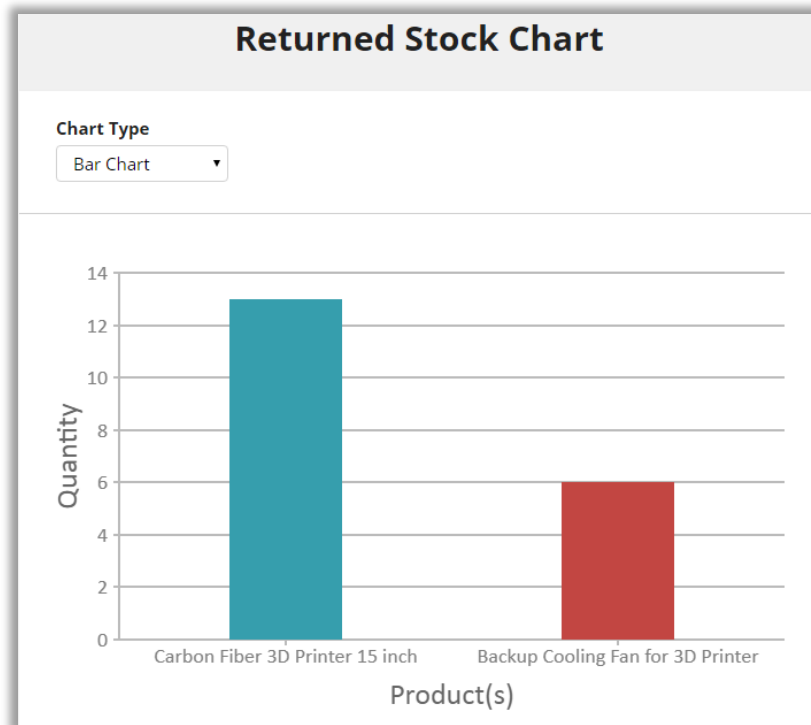
Products	Stock
60 Watt Light Bulbs	10
ABS Filament 3D Printer 4 inch	3
Backup Cooling Fan for 3D Printer	15
Carbon Fiber 3D Printer 15 inch	11

Previous **1** Next

Returned Stock

- **Returned Stock** Chart displays a Bar Chart, Pie Chart and Line Chart for the stocks returned of the selected products. A table is also displayed besides the Charts displaying the list of products along with their quantity (stock).

Bar Chart

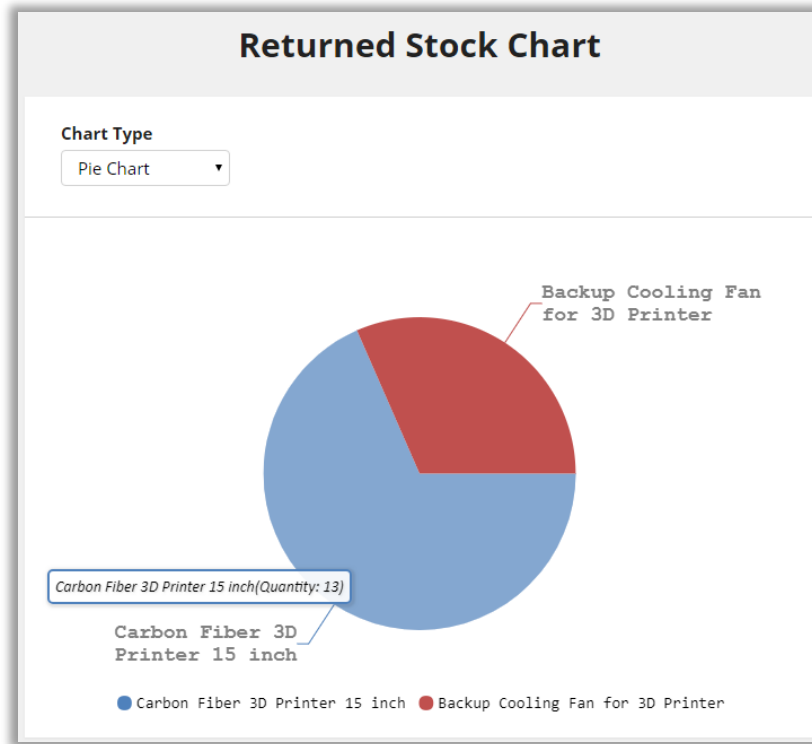


Show 10 entries

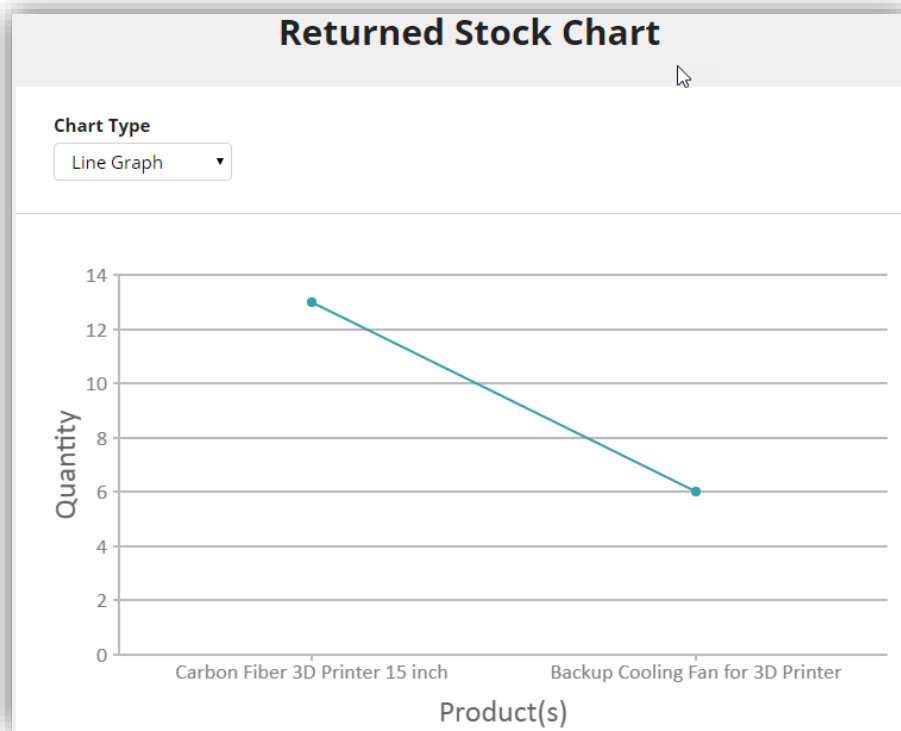
Products	Stock
Backup Cooling Fan for 3D Printer	6
Carbon Fiber 3D Printer 15 inch	13

Previous 1 Next

Pie Chart



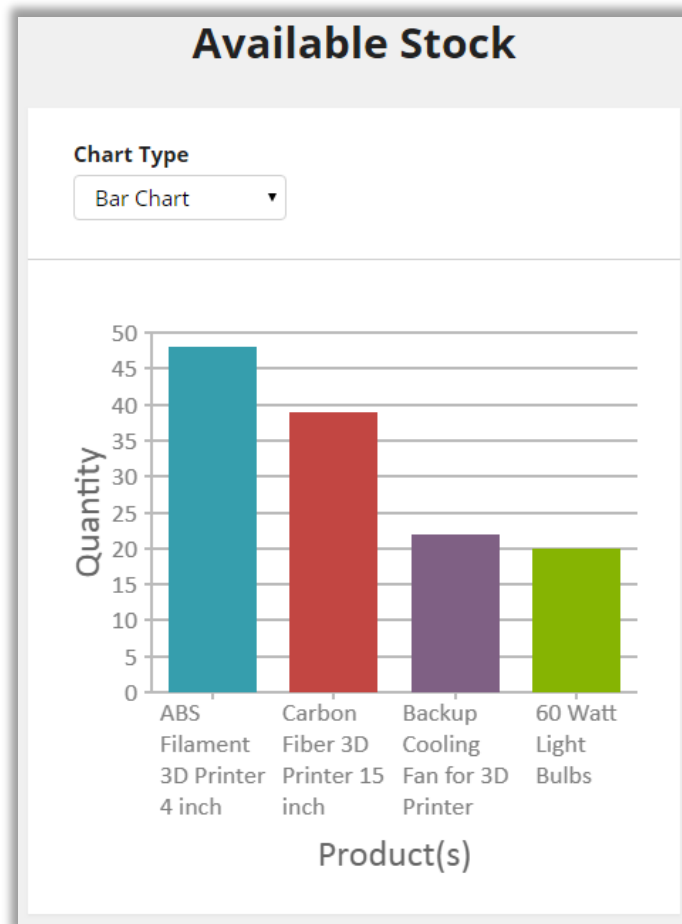
Line Chart



Available Stock

- **Available Stock** Chart displays a Bar Chart, Pie Chart and Line Chart for the total stocks available of the selected products. A table is also displayed besides the Charts displaying the list of products along with their quantity (stock).

Bar Chart

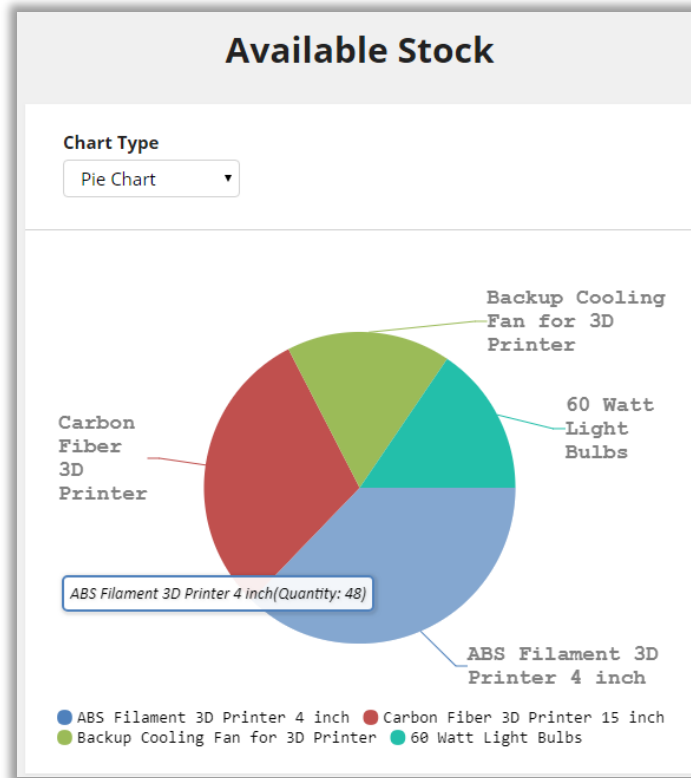


Show 10 entries

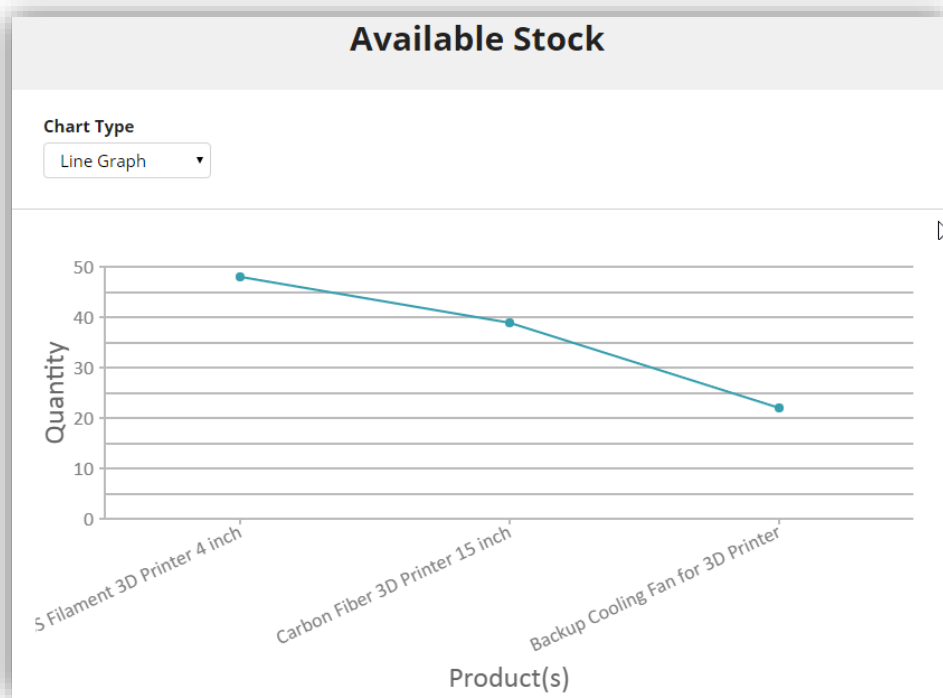
Product	Stock
60 Watt Light Bulbs	20
ABS Filament 3D Printer 4 inch	48
Backup Cooling Fan for 3D Printer	22
Carbon Fiber 3D Printer 15 inch	39

Previous 1 Next

Pie Chart

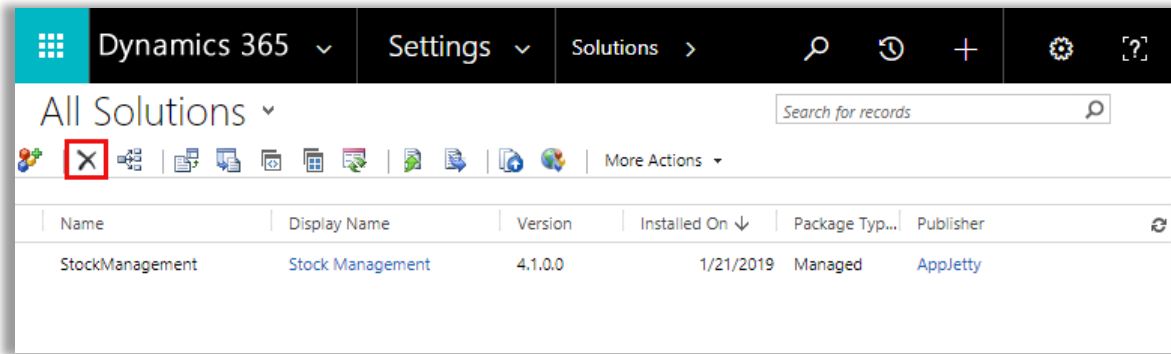


Line Chart

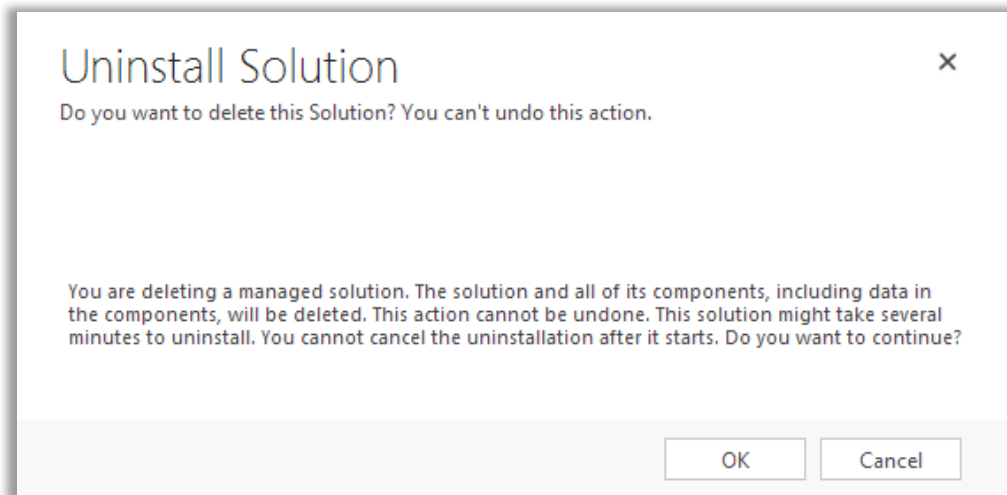


Uninstallation Steps

- To uninstall the Solution, navigate to **Settings - > Solutions**.
- Check on the Plugin Name and click on **'Delete'**.



- Click on **'OK'** to Delete and uninstall the solution from CRM.



Contact Us

We simplify your business, offer unique business solution in digital web and IT landscapes.



Live Chat

- Get instant support with our Live Chat.
- Visit our product page at: <https://www.appjetty.com/dynamicscrm-stock-management.htm> and click on the Live Chat button for instant support.



Tickets

- Raise tickets for your specific question!
- Send an email to support@appjetty.com or you can login to your account @ www.appjetty.com and click on My Support Tickets on your account dashboard, to get answers to your specific questions.

Customization:

If you would like to customize or discuss about additional features for **Stock Management For Dynamics 365 Sales**, please write to sales@appjetty.com