



Sales Assortment accelerator for
Microsoft Dynamics 365 Business
Central
USER GUIDE



Change control

Date	Version	Prepared By:	Change
02-22-2019	1.0	Barry Teunissen	Update manual to the Dynamics 365 Business Central version & additional developments
09-05-2019	1.1	Fabrice Fulconis	Update to installation

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1 Introduction

1.1 Solution description

The Sales Assortment accelerator functionality is available in the following sales documents:

- > Quote
- > Order
- > Invoice

1.2 Goal of solution

Organizations lose productivity when processing sales orders when they need to manually cross-reference preferred items to make available to customers.

The accelerator helps by improving the sales order process. Sales Assortment can be used in quote, order and invoice functionality to either include or exclude items depending on your customer preferences and history.

This list is updated through a customary process of the shipping history per customer. You will be able to choose between selling items belonging to this list of assortments or to sell new items.

New items may be added to the customer's **assortment** by logging into the customer's assortment list from the sales document.

1.3 Application pack contents

The Sales Assortment package should contain the following files:

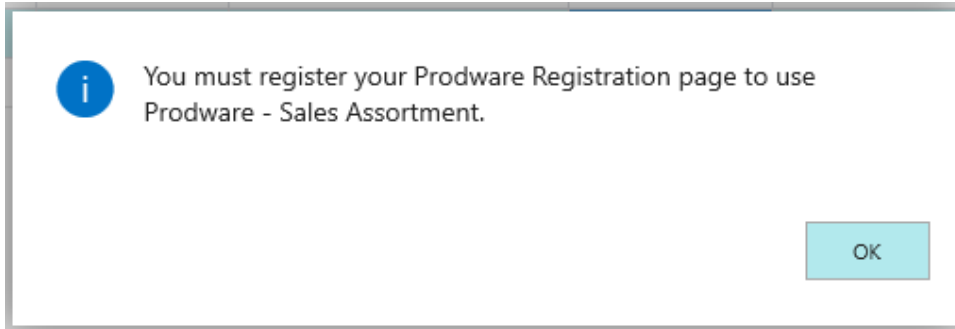
- > Binaries application package: Prodware_Sales_Assortment_x.x.x.x.app (where x.x.x.x represents accelerator version)
- > User Guide : This document

1.4 First launch

Important: All following actions that are needed to register to Prodware license system must be done using administrator level access. Connect to your Dynamics 365 Business Central system using a login with all necessary permissions (SUPER).

1.4.1 [Registration to the Prodware License system](#)

The first time you use some functionalities of this accelerator you may encounter a message like this one:



You must register and activate a trial license to continue testing the accelerator.

First, ensure that Prodware – Internal Library configuration allows httpClient connections.

From Extension management, configure the application.

TELL ME WHAT YOU WANT TO DO



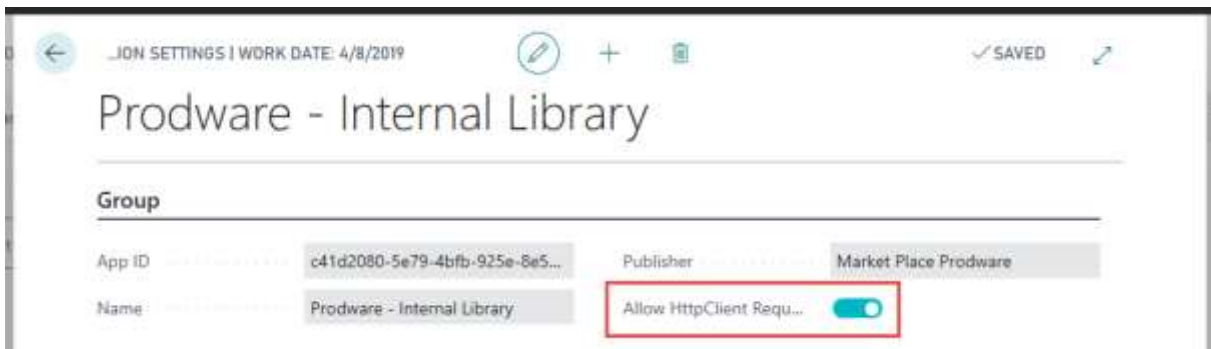
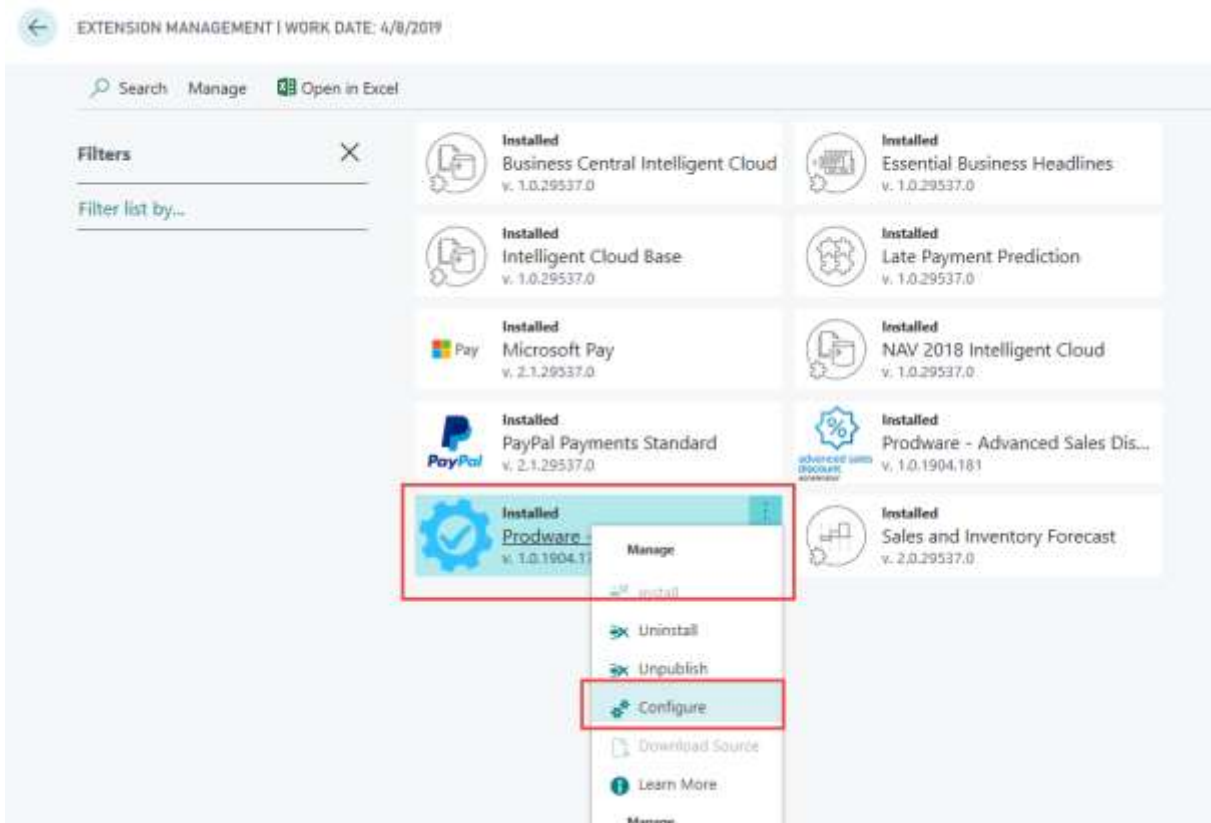
extension management



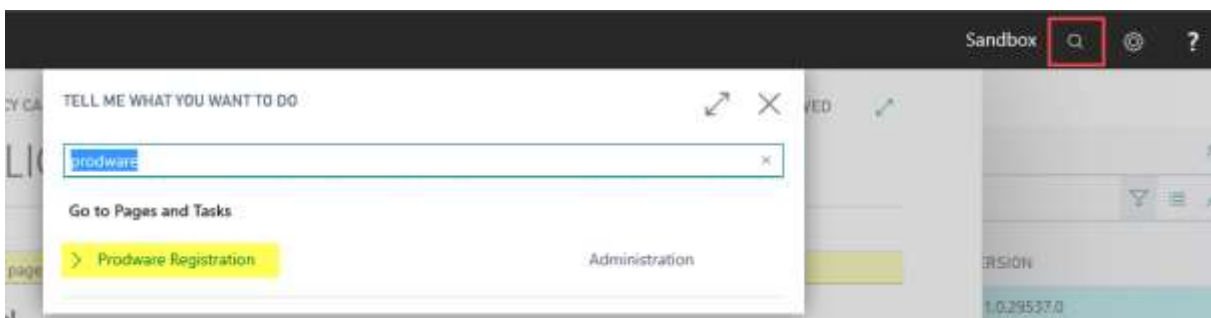
Go to Pages and Tasks

> Extension Management

Administration



Then search from “Tell me what you want...” Dynamics 365 Business Central functionality for Prodware Registration:



Then complete all mandatory information or copy it from your company information.

Use “Apply Company Information” to select a company and copy all corresponding information to registration page.

Use “Apply Administrator Information” to select a user and copy their full name and contact email to administrator’s information.

The screenshot shows the 'Prodware Registration' interface. At the top, there are navigation icons (back, edit, add, delete) and a 'SAVED' status indicator. Below the title, there are tabs for 'Registration', 'License', 'Actions', 'Navigate', and 'Fewer options'. Three main buttons are visible: 'Apply Company Information', 'Apply Administrator Information', and 'Register'. The 'Apply Company Information' button is highlighted in yellow.

Company Show more

Name	My Company	Contact Person	Adam Matteson
Address	5 The Ring	Phone No.	0666-666-6666
Post Code	W2 8HG	E-Mail	myaddress@mycompany.mail
City	London	VAT Registration No.	777777777
Country/Region Code	GB		

Administrator Show more

Name	Administrator	E-Mail	admin@mycompany.mail
------	---------------	--------	----------------------

Registration

Id	{00000000-0000-0000-0000-000000000000}
----	--

Then click on Register to register to the Prodware License System. A unique ID linked to your information will be granted and can be seen on this page.

Prodware Registration

Registration License Actions Navigate Fewer options

Apply Company Information Apply Administr...tor Information Register

Company Show more

Name My Company Contact Person Adam Matteson

Address 5 The Ring Phone No. 0666-666-6666

Post Code W2 8HG E-Mail myaddress@mycompany.mail

City London VAT Registration No. 77777777

Country/Region Code GB

Administrator Show more

Name Administrator E-Mail admin@mycompany.mail

Registration

Id 85f2...499

1.4.2 [Trial license activation](#)

While using this accelerator you may be asked to activate a trial license. Just click Yes to activate it, which will let you test some of the functionalities of the accelerator during a given time.

Subscribe to / update Prodware - Sales Assortment ?

Yes No

Once the trial has expired, the accelerator will not be usable in the production environment anymore and will need to un-installed.

1.4.3 [Update after purchase](#)

If you purchased this accelerator, you can update your license at any time from the Prodware Registration page.

Prodware Registration

Registration License Actions **Navigate** Fewer options

App. Licenses

Company Show more

Name: My Company Contact Person: Adam Matteson

Address: 5 The Ring Phone No.: 0666-666-6666

Use the Subscribe / Update action button.

PRODWARE APP. LICENSES | WORK DATE: 4/11/2019

APP. NAME	APP. VERSION	APP. DATA VERSION	LICENSE LEVEL	ACTIVATION DATE	EXPIRATION DATE
Prodware - Sales Assortment	1.1.1903.166	1.1.1903.166	Trial	5/16/2019	6/15/2019

2 Set up & Installation guide

2.1 System requirements

Sales Assortment can be installed on Microsoft Dynamics 365 Business Central.

A license is required to execute complete functionalities. Contact Prodware to obtain your license.

2.2 Installation

Important: Before any installation and/or modification, you must create a backup of your solution so that you can restore it if you encounter any issue with your set-up.

Refer to Microsoft documentation to install your accelerator as with any Dynamics 365 Business Central extension.

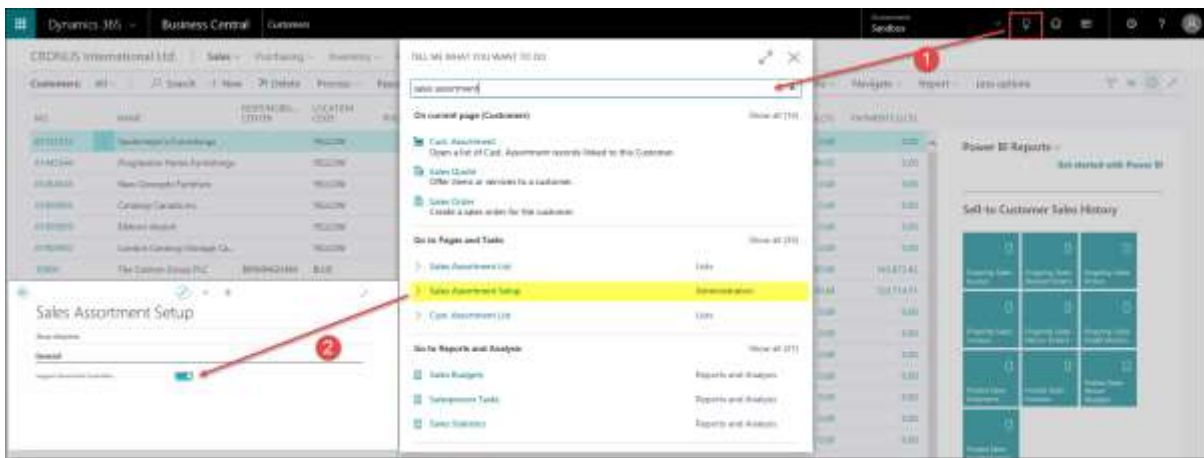
From App Source: <https://docs.microsoft.com/en-us/dynamics365/business-central/ui-extensions>

For On premise environment: <https://docs.microsoft.com/en-us/dynamics365/business-central/dev-itpro/developer/devenv-how-publish-and-install-an-extension-v2>

3 Getting started with the Sales Assortment accelerator

3.1 Sales Assortment settings

After the installation of the accelerator, you can show the assortment list with the Quantity completed in the Item line. To do this, the check mark in the Sales assortment setup must be turned on. If this checkmark is not checked, the assortment list will always show a "0" when recalling the item lines in the "number" field.



3.2 Customer card

Set up the "Sales Assortment" in the customer card of the customers you wish to manage via an items list in an assortment.

If the "Sales Assortment" field is active, you will be able to open the page of customer selections from the customer card and to use the assortment in the sales orders.

There are three possible choices:

- Blank: Sales Assortment is not active.
- Mandatory: you will only be able to sell the items that are part of the customer's assortment list.
- Enabled: you will be able to sell any items, present or not in the customer's assortment list.

