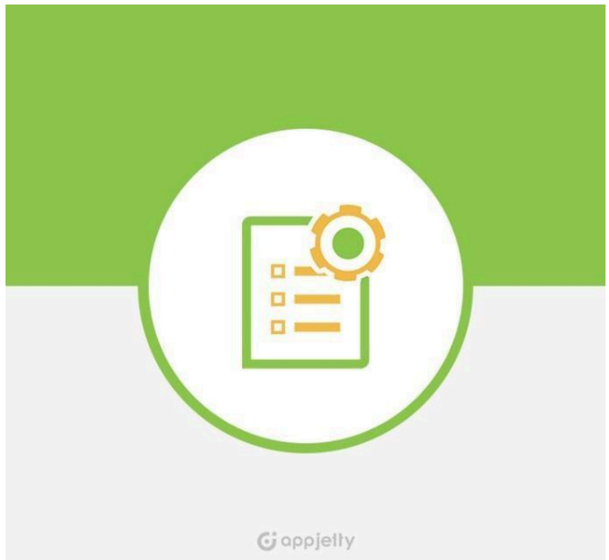
USER MANUAL



Stock Management For Dynamics 365 Sales

Version: 4.2

Compatibility:

Dynamics 365 Online

TABLE OF CONTENTS

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 D365 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:

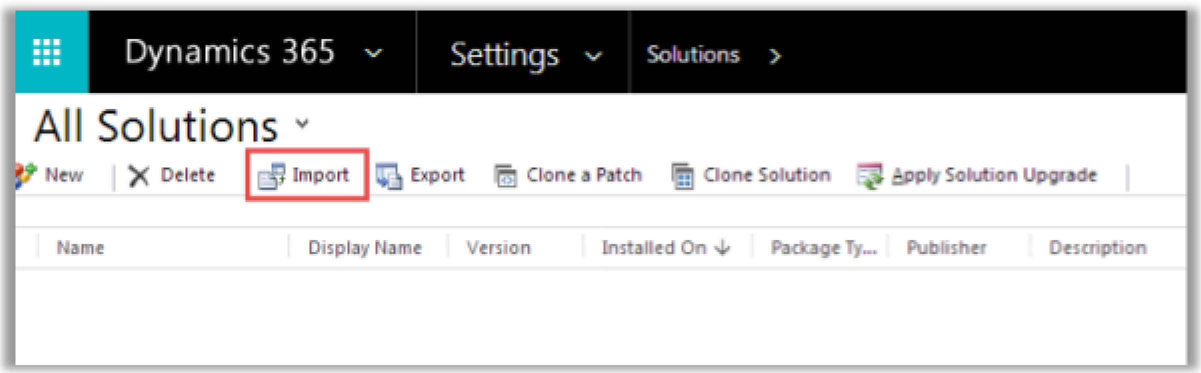
- You should be logged into Dynamics CRM or Dynamics 365, Online or On-Premise.

Installation & Configuration

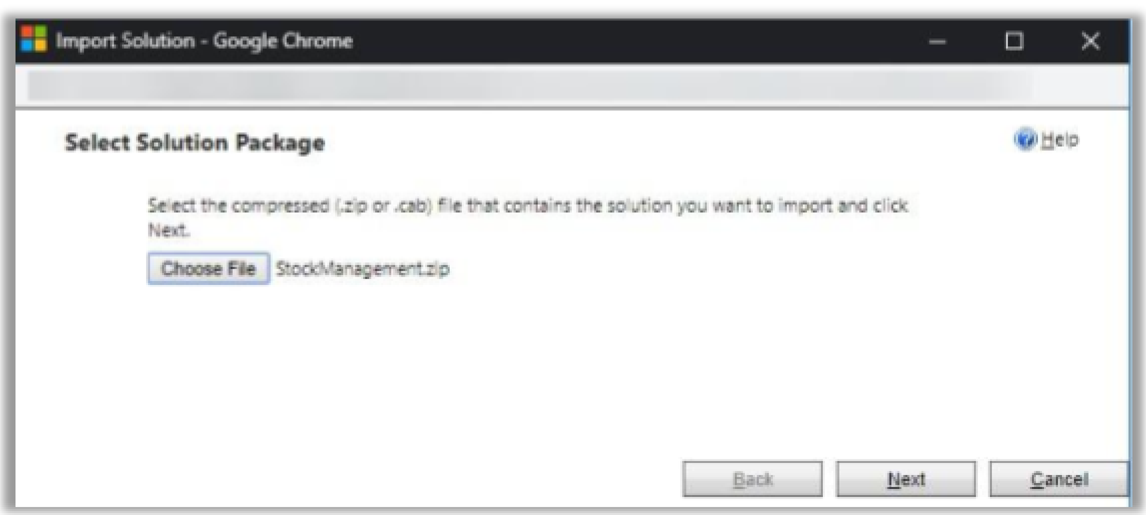
Installation Steps

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

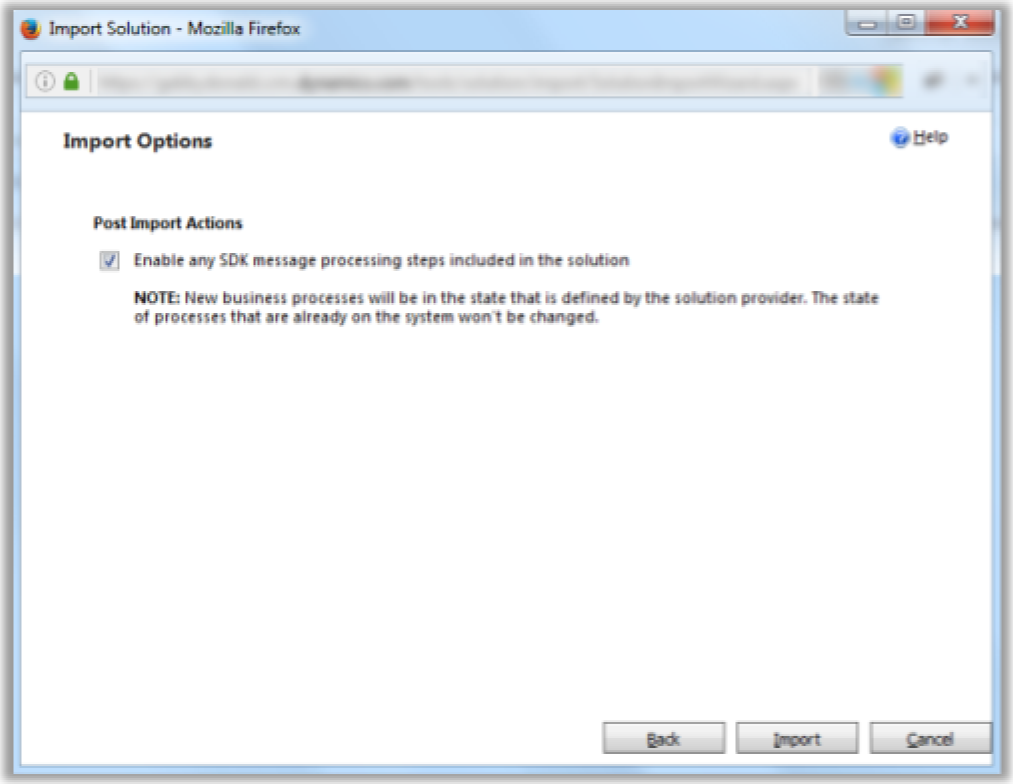
- On purchasing the plugin, you will get a zip file named StockManagement.zip.
- Login into your CRM Account and click on **Settings -> Solutions**



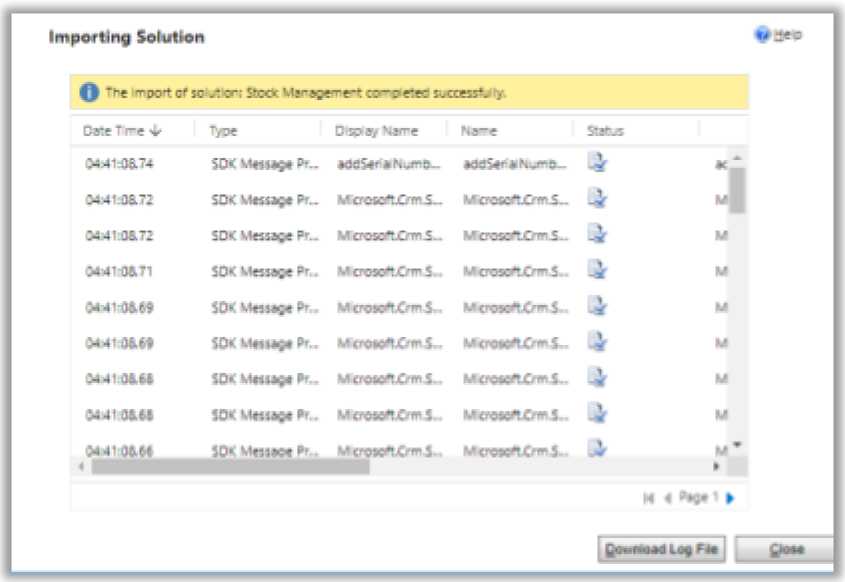
- Click on **'Import'** to upload and install the Solution.
- Click on **'Browse'** button and choose the Package Zip File for Stock Management from the Import Solution Window.



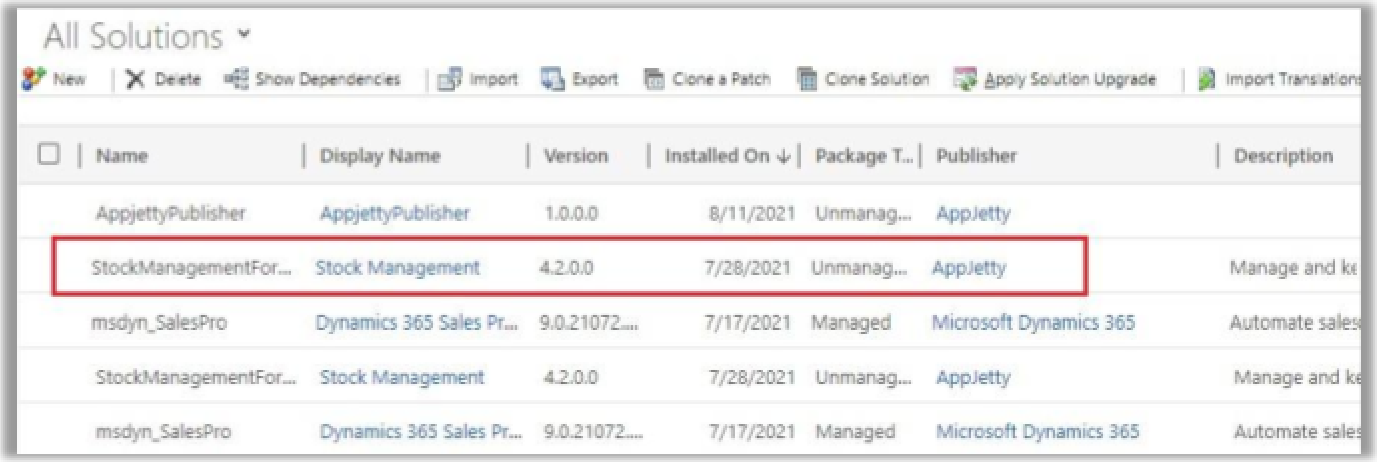
- Click on **'Next'** for further processing.



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



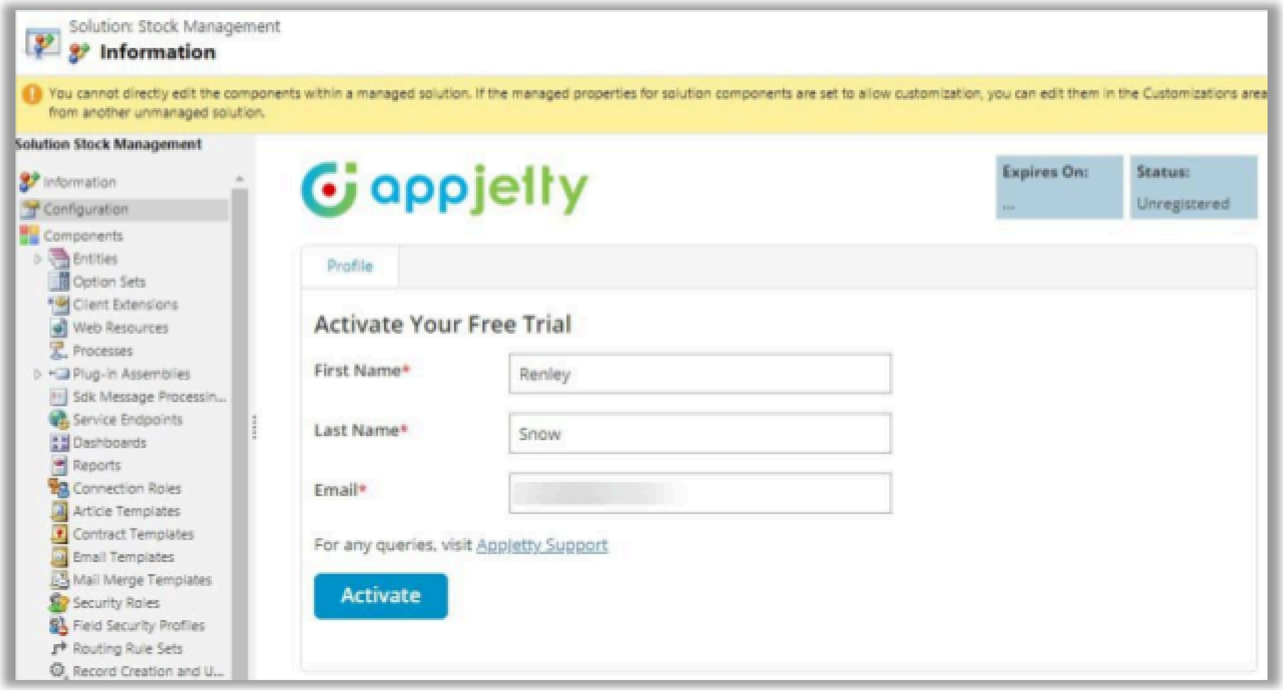
- Click on **'Close'** to complete the process.



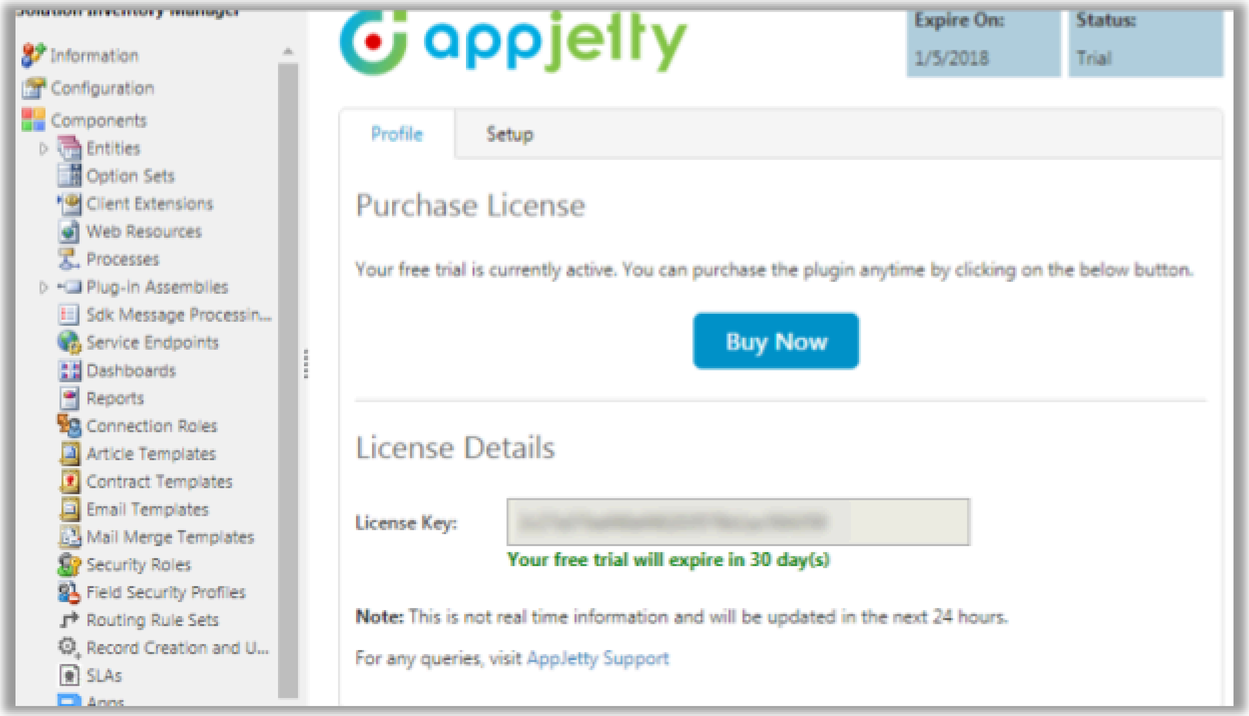
- Once you import the solution, it will be displayed in the solutions grid view.

Configuration Steps

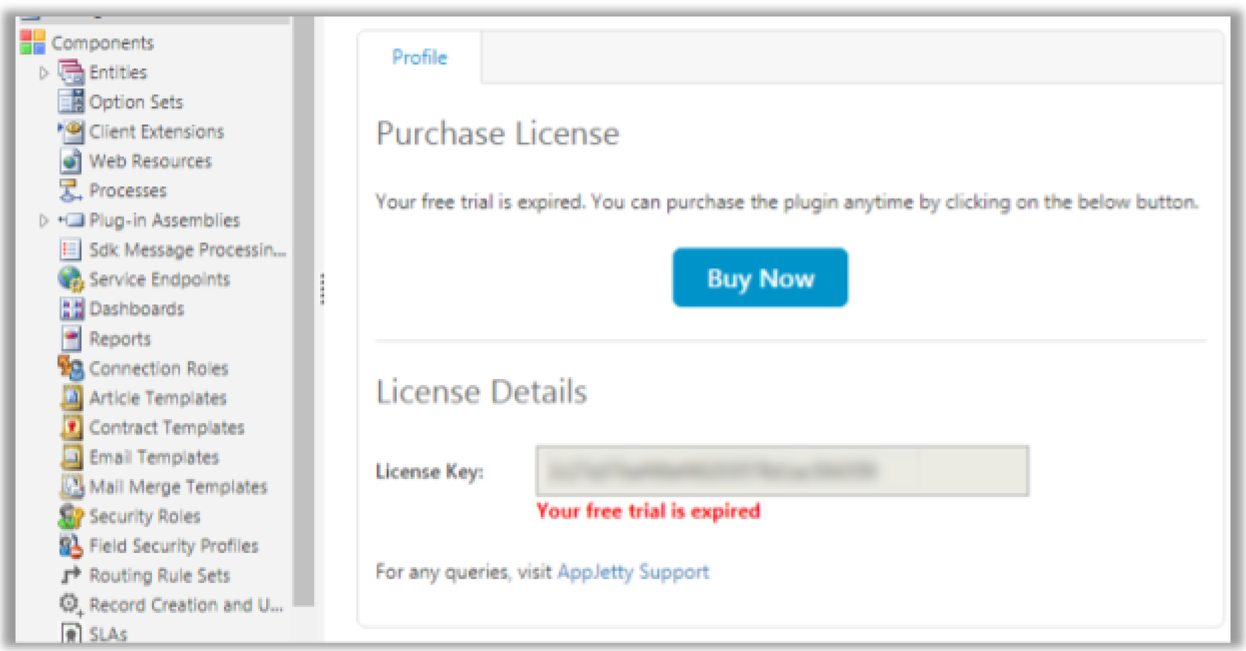
- Double-click on the **'Stock Management'** solution to configure the plugin with your license key.
- This will open up a new window. Click on **'Configuration'** from the options provided on the left side.



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

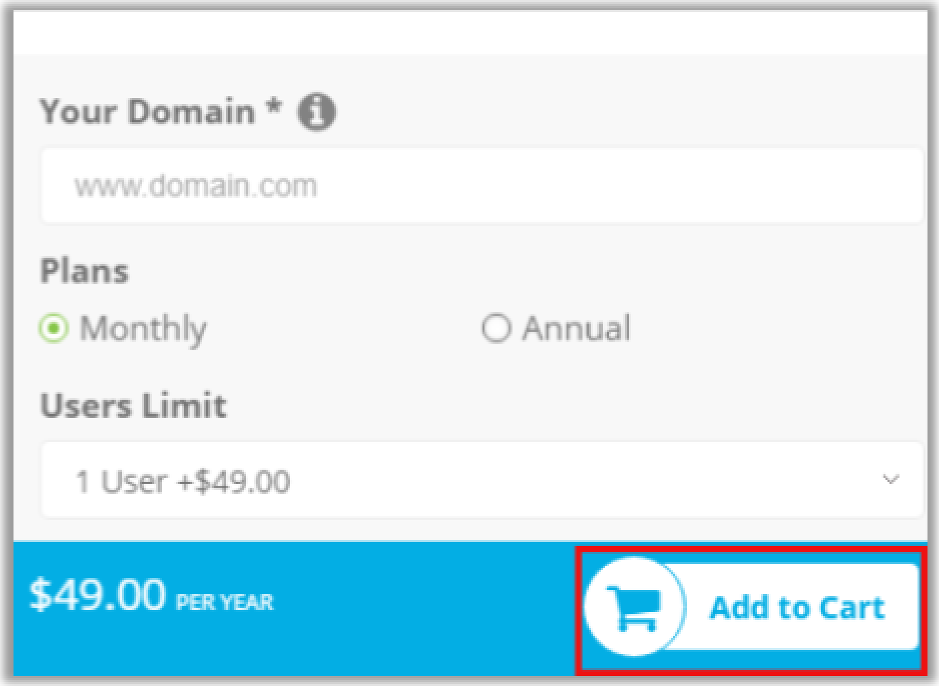


- You can purchase the licensed version at any time. To purchase the license, click on the **'Buy Now'** button.



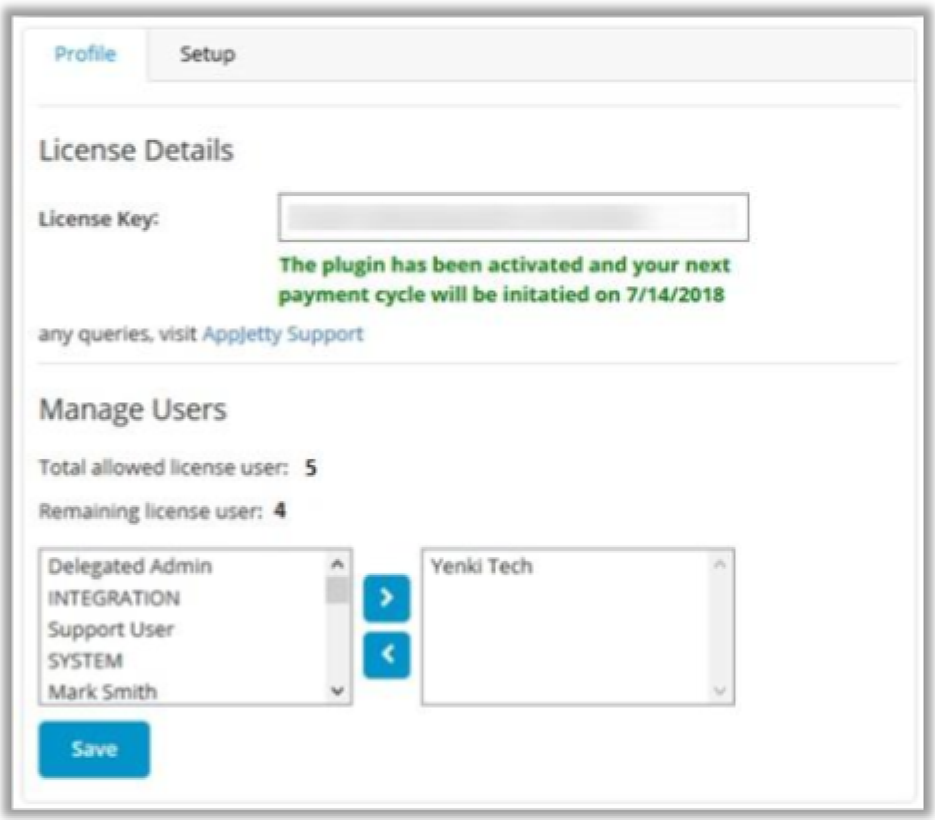
- On the expiration of the Trial, a message will appear that the trial has expired. Now to purchase the license click on the **'Buy Now'** button.

- This will redirect you to our product page and a pop-up will appear to request a quote. Click on the **'Add to Cart'** button and complete the purchase process.

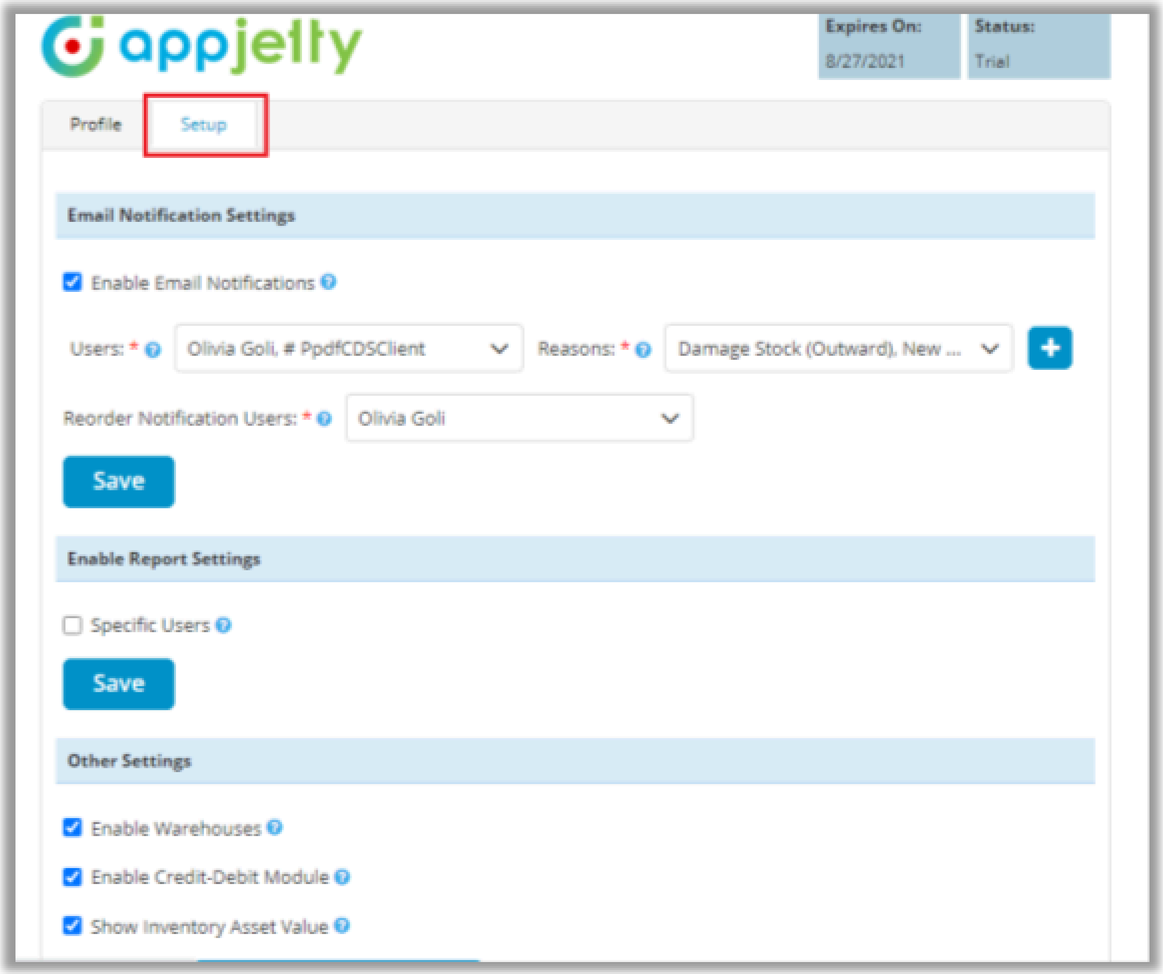


- On successfully completing the process and once you have purchased the plugin, you will receive your license key via email along with steps to complete the license configuration.

- Click on the '**Activate**' button to activate your license.



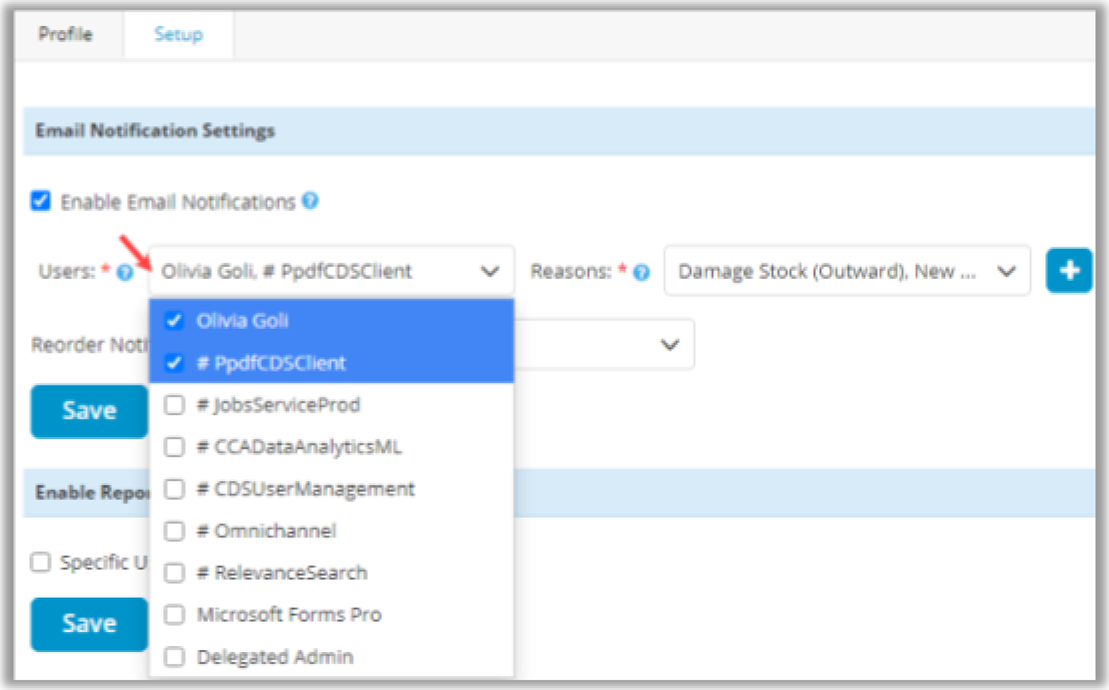
- After submitting the valid license key, you will be navigated to the **'Setup'** tab.



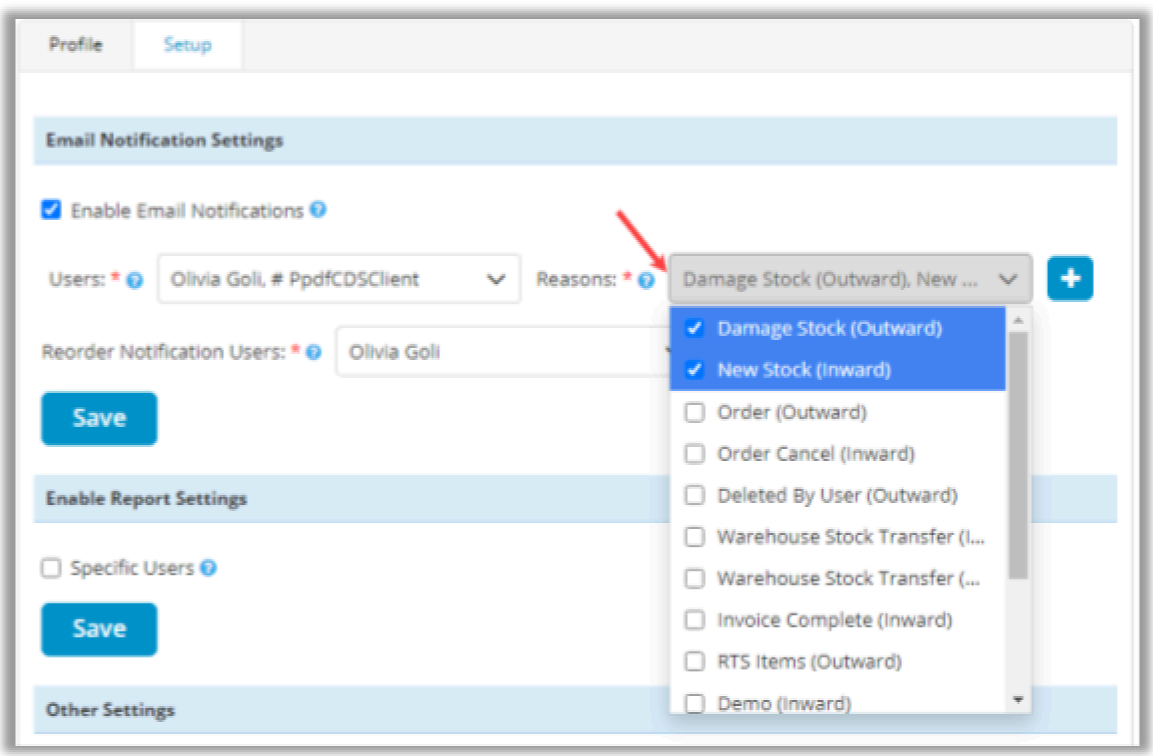
- From the **'Setup'** tab, you can enable/disable "Email Notification Settings", "Enable Report Settings" "Warehouses", "Credit and Debit Module", and "Inventory Asset Value".
- By ticking the **'Enable Email Notification'** checkbox, **'Users',** 'Reasons', and **'Reorder Notification Users'** options will appear below the Enable Email Notification.
- Ex. The CRM user who is handling the stocks of the product will be notified when there's a change in the stocks. So, here, you need to select the user(s) who is handling the stocks in the "Users" and stocks related "Reasons" when the specific action occurs.

Enable Email Notifications

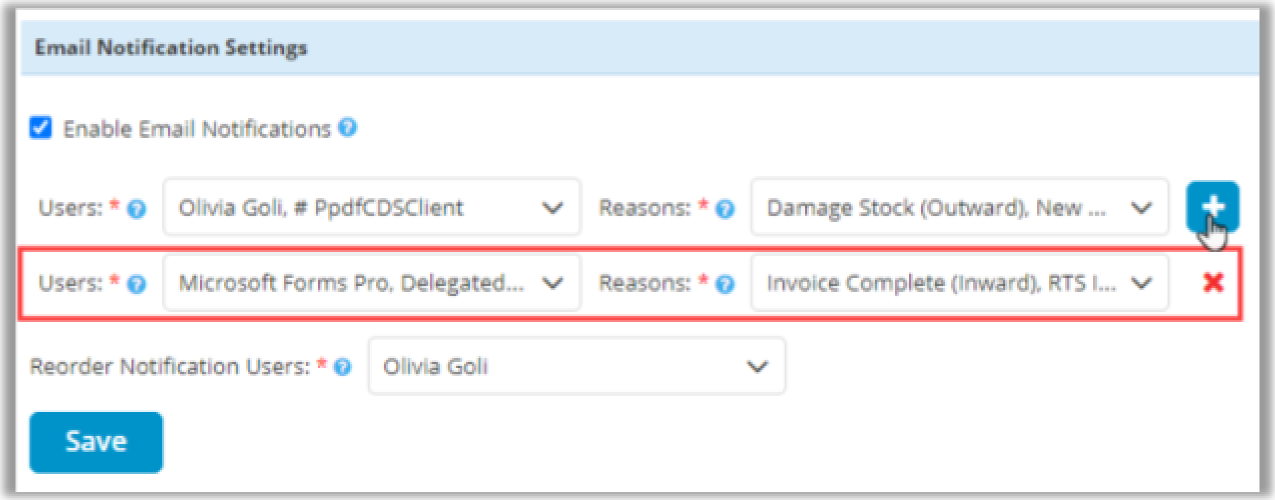
- By ticking the “Enable Email Notification” checkbox, you can manage the user-wise email notifications for their stock transactions.
    - **Users**: You need to select the specific users (CRM users) from the drop-down list.



    - **Reason**: You need to select the Reasons (activities) to get the email notification when the specific activities occur.



- **Add Records**: You can also add more users to send the email notification for the specific stock transaction activities by clicking on the **+** (Add) icon.
- By clicking on the **+ (add)** icon, the new "Users" and the "Reasons" tabs will be added. You can select the required "Users" for the specific stock transaction activities and the "Reasons" to send the email to the selected users.

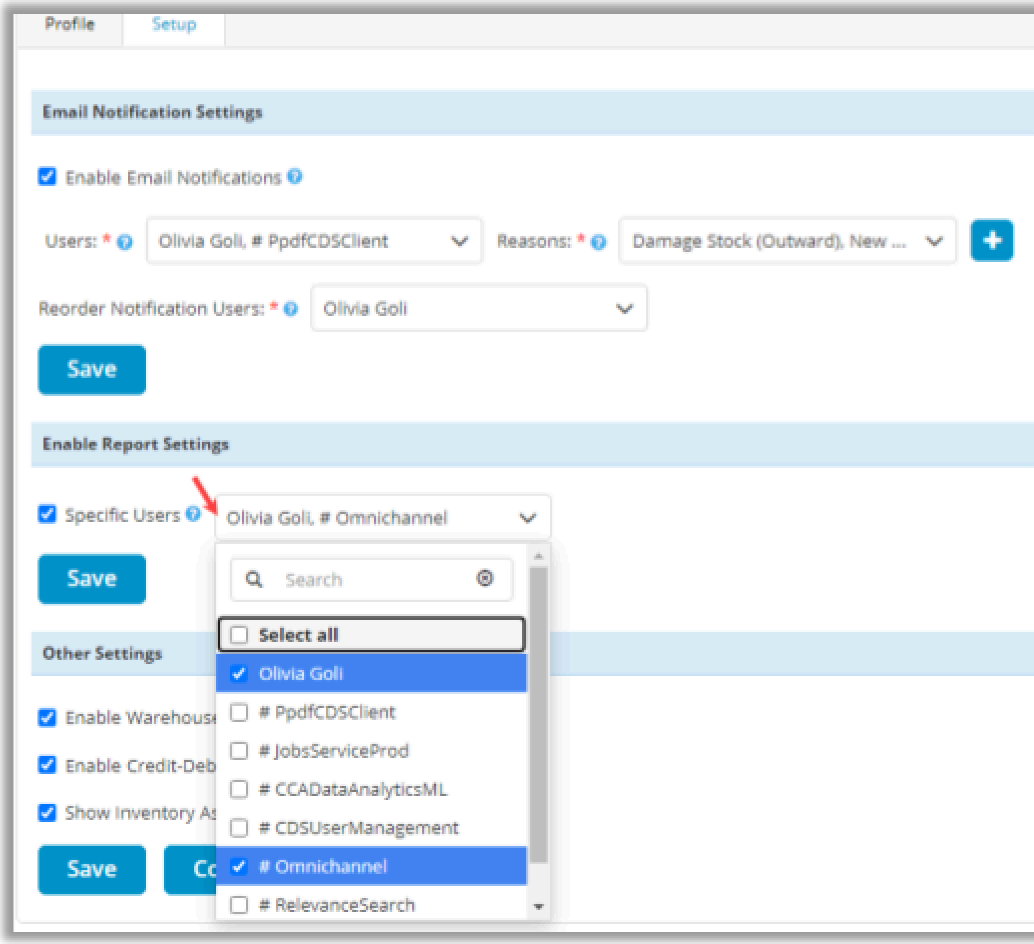


- Similarly, you can add more records to send email notifications for the stock transaction activities.
- **Recorder Notification Users:** You need to select the users who will be receiving email notifications related to the **product reordering**.

- After configuring the "Email Notification Settings", click on the **Save** button to apply the changes.

Enable Report Settings

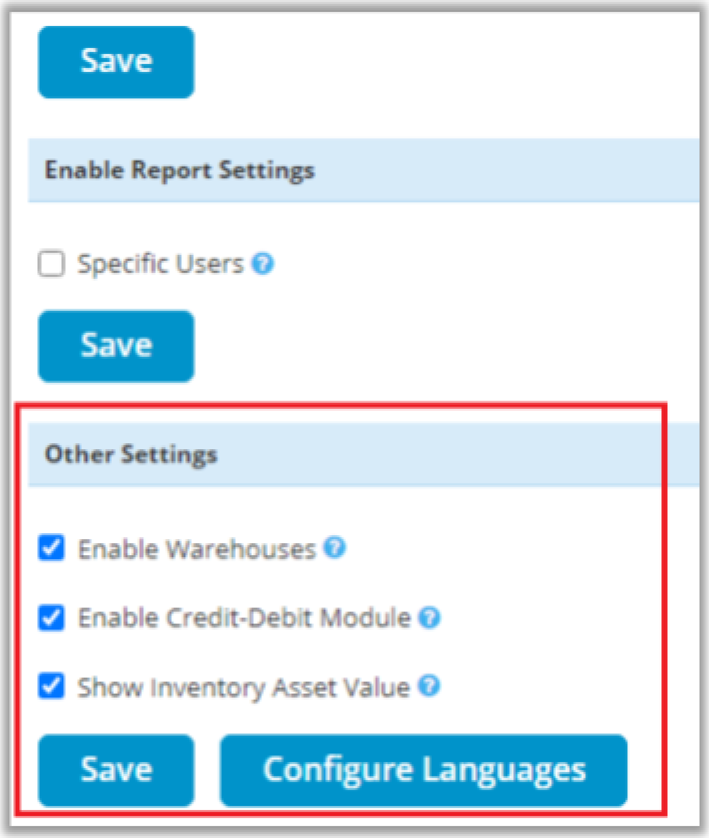
- You can restrict the Reports, Charts, and Dashboard to specific users. Tick the checkbox of the "Specific Users" to display the Reports only for the selected users from the drop-down.



- After selecting the users, click on the **Save** button to apply the changes. So, only the selected users can access the Reports, Charts, and Dashboard.

Other Settings

- **Enable Warehouses:** To enable the Warehouses in Stock Management for Dynamics 365 Sales, tick the **'Enable Warehouses'** checkbox
- **Enable Credit-Debit Module**: To enable the Credit-Debit module in the Stock Management for Dynamics 365 Sales, tick the '**Enable** Credit-Debit **Module**' checkbox.



- **Show** Inventory **Asset Value**: To show the inventory asset value in the inventory asset report, tick the "Show Invest Asset Value" checkbox to enable error log tracking.
- Once you have enabled the 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

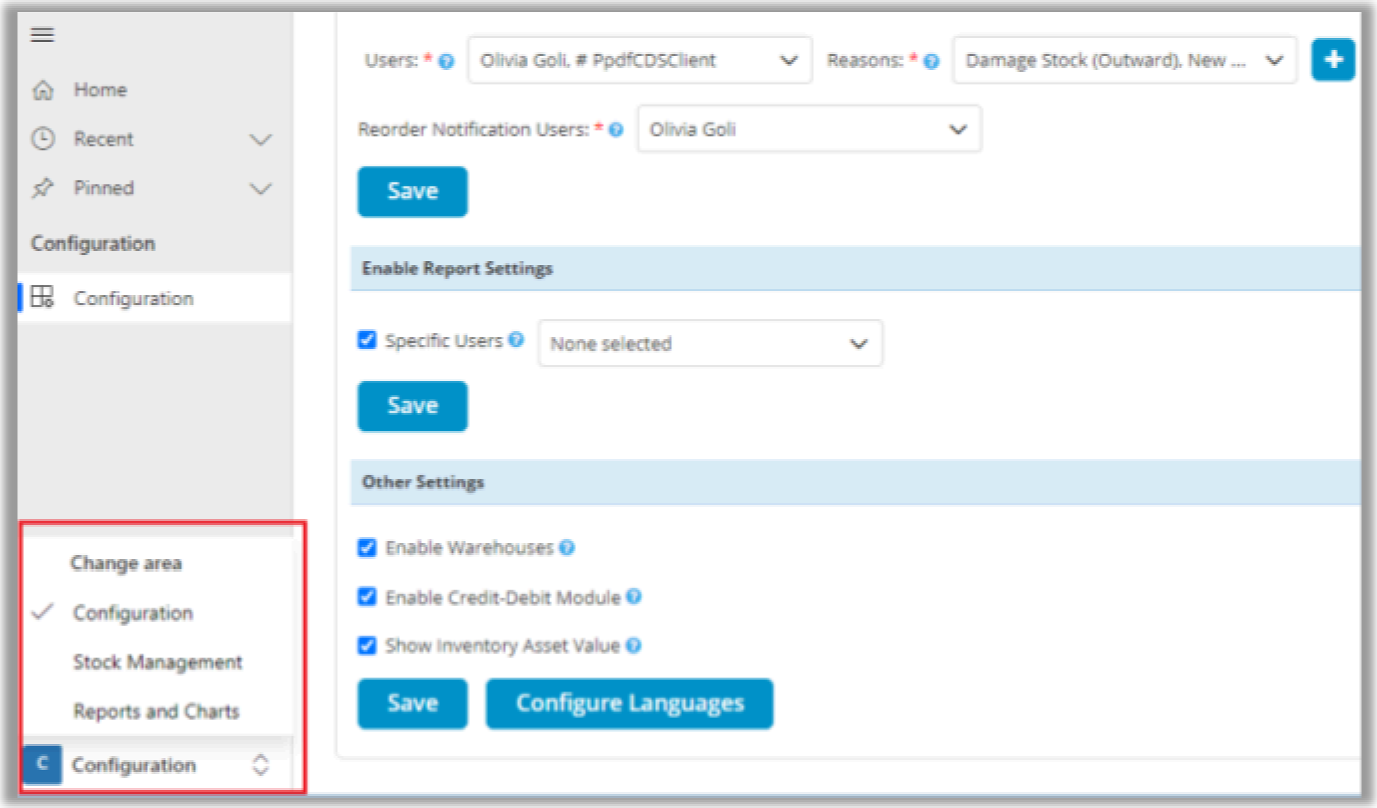
- You can also configure the language of your choice by clicking on configure languages button available on the setup page.
- On configure, language page, select the language from the dropdown that you wish to configure messages for.

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

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

Stock Management

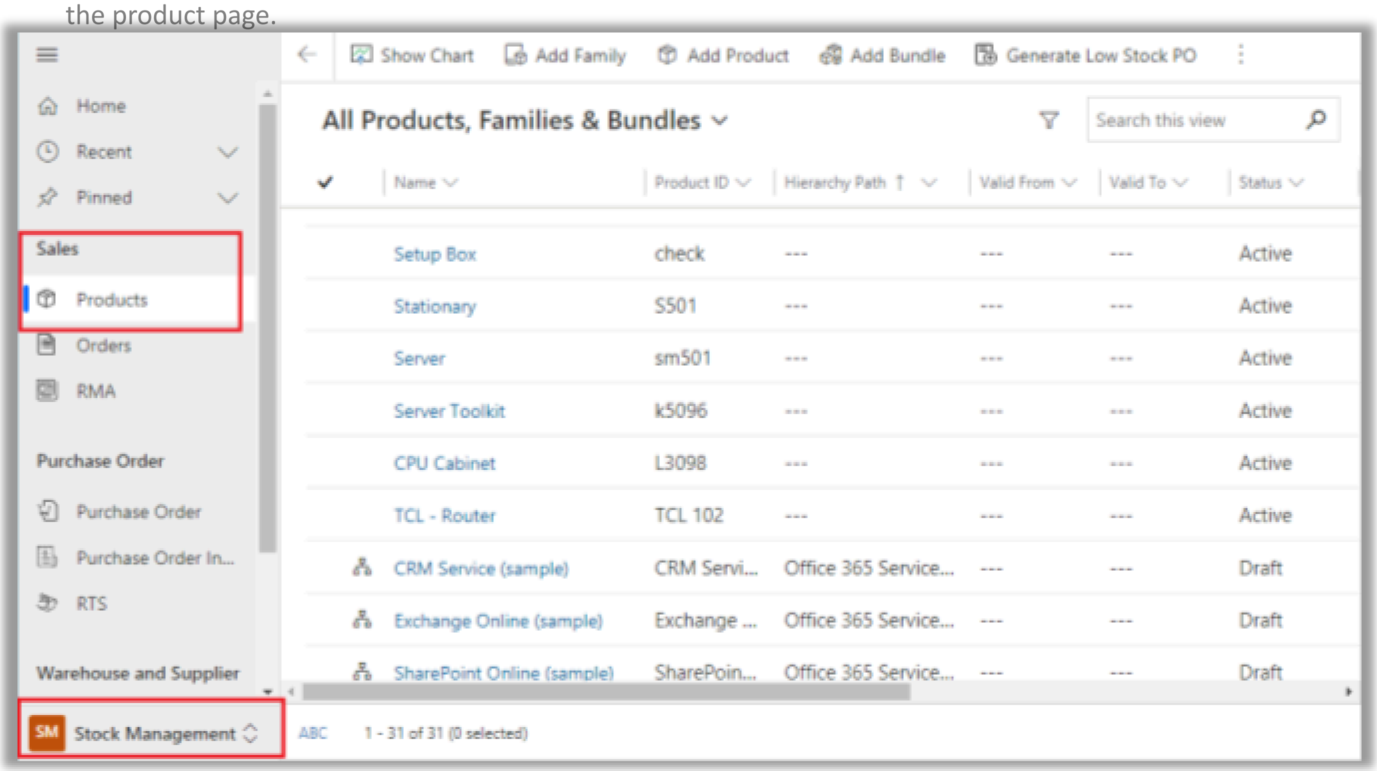
- Once you configured the Stock Management app, you can navigate to manage the stocks transaction, product updates, and reports with different level charts.



- You will get the navigation panel from the left-bottom side, you will find the three options in the navigation panel:
  - Configuration: You can configure the Stock Management settings.
  - Stock Management: You can manage the stock transactions like Sales, Purchase, Warehouse, and Supplier.
  - Reports and Charts: You can check and analyze the Dashboard, different Reports, Charts.

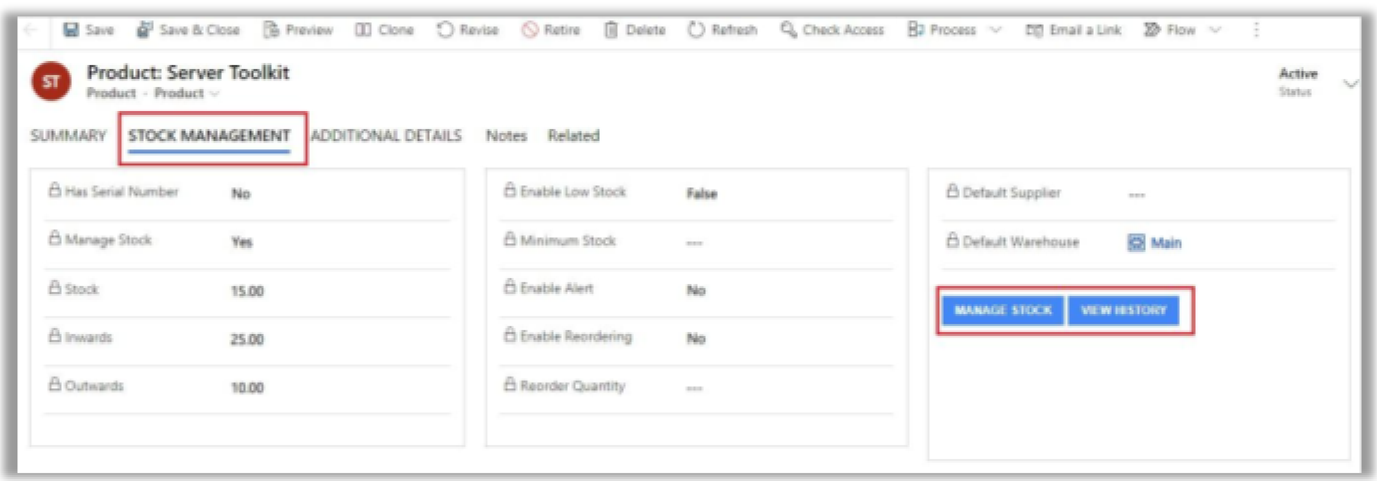
Products

- By clicking on the **Stock Management** ➐ **Sales** ➐ **Products**, you will be redirected to the list of the product page.



- Here, you will be able to manage only those products which are Active. By clicking on the product name, you will be redirected to the product detail page.

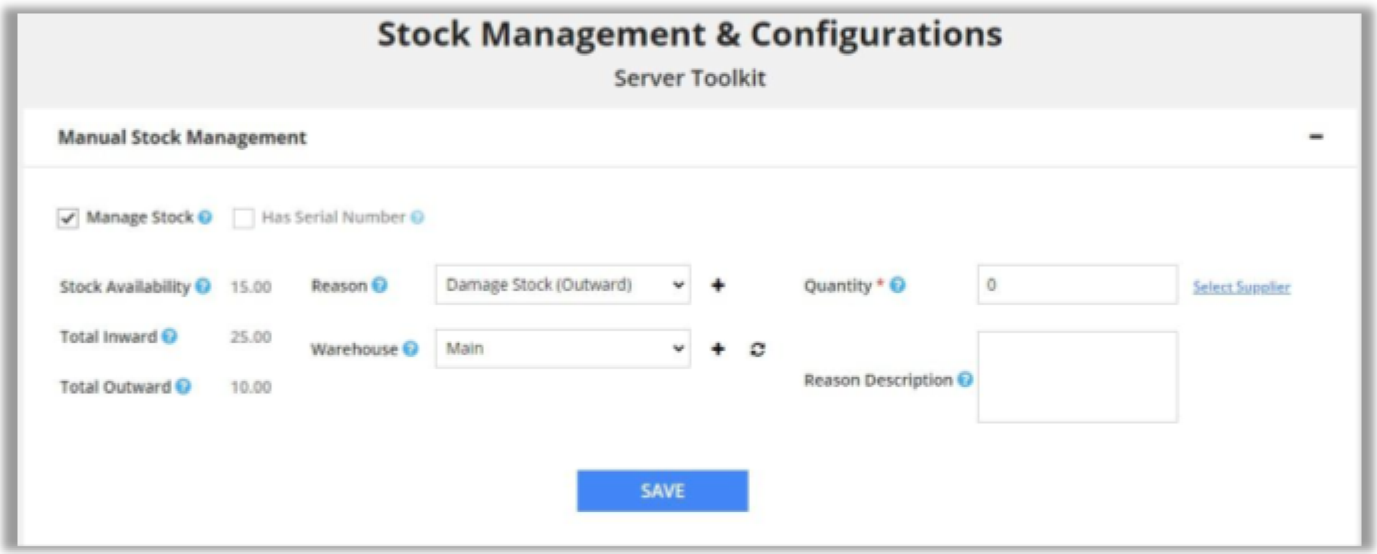
Stock Management



- In the STOCK MANAGEMENT panel, you can find product-related details regarding the stocks like Available Stock, Minimum Stock Level, Reordering Quantity, Inwards, and Outwards.
- You can check whether the product has a Serial Number or not and know if a product is a Low Stock enabled product or not.

- You can also get an idea from the detail page itself if Alert and Reordering options are enabled or not.

- If the default supplier and default warehouse are already assigned, both will be shown in the stock management panel. You will find the “MANAGE STOCK” and “‘VIEW HISTORY” buttons.
- You can add/edit the product’s stock-related details by clicking on the MANAGE STOCK button.
- By clicking on the “MANAGE STOCK” button, a new window will open with the stock details, wherein you can configure the stocks for that product. It will display the available stock of the product, its total inward & outward quantity till now.

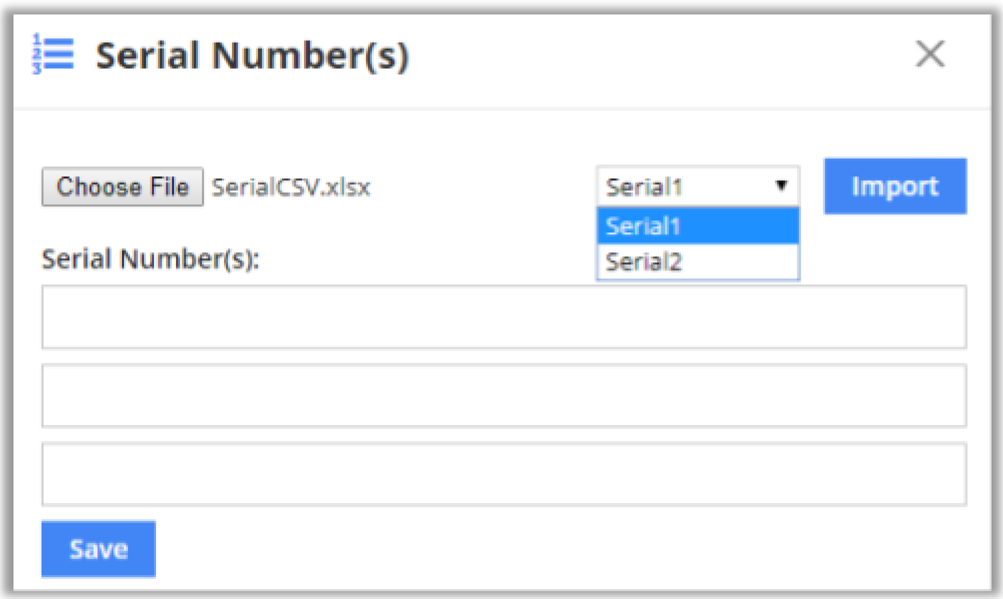


- Here, you can manage the product’s stock and stock-related details manually.
- If you are adding a product, you need to tick the ‘Manage Stock’ check box to enable stock management for the selected product or if you are editing the product, you will see the ‘Manage Stock’ checkbox is already checked.
    - Reason: You can select the “Reason” (activity) for managing the stock.
    - Warehouse: You can select the required Warehouse in that you need to update the stock.
    - Quantity: Insert the quantity of the product you want to update. Here, you can also select the supplier by clicking on the “Select Supplier” text caption.
    - Reason Description: Insert the relevant information regarding the stock update.

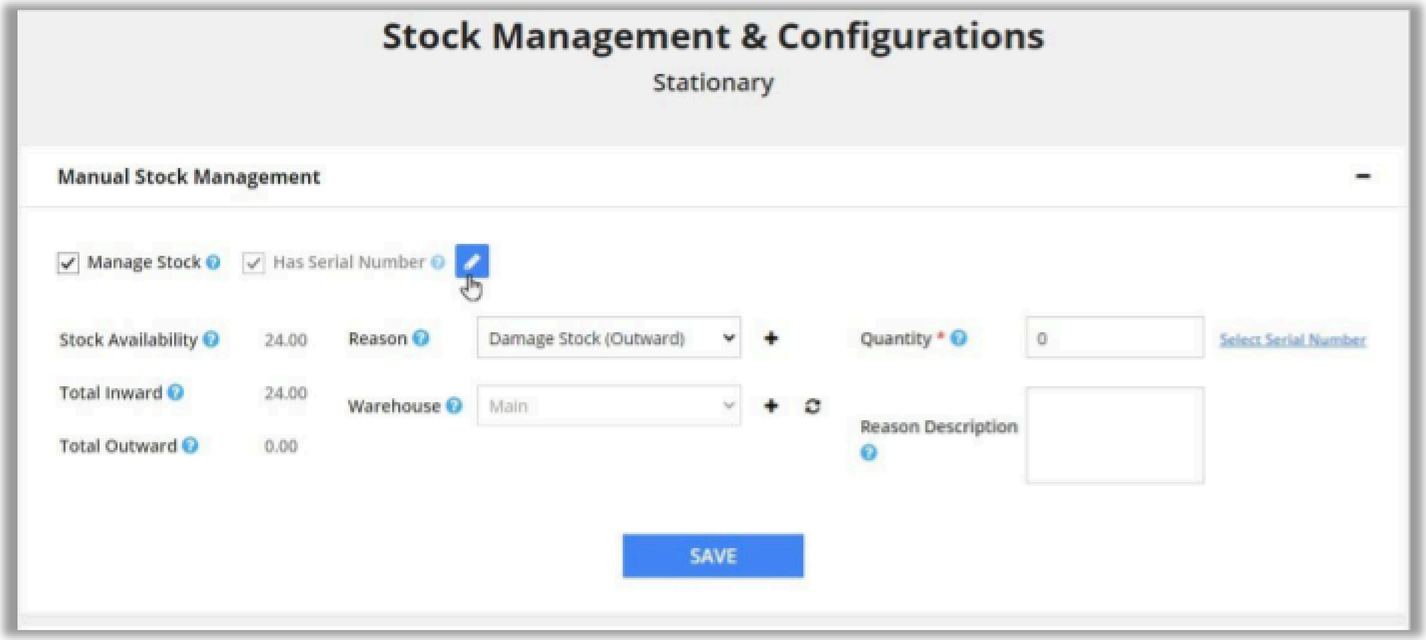
Serial Number

- Now, if you are adding the product, you need to tick the checkbox **'Has Serial Number'** if you want to manage the stock serial number-wise. You need to select the Serial Numbers by clicking on the "Add Serial Number" text caption.
- By clicking on "Add Serial Number", it will open a screen where you can either add all numbers manually or directly import CSV or XLSX files.

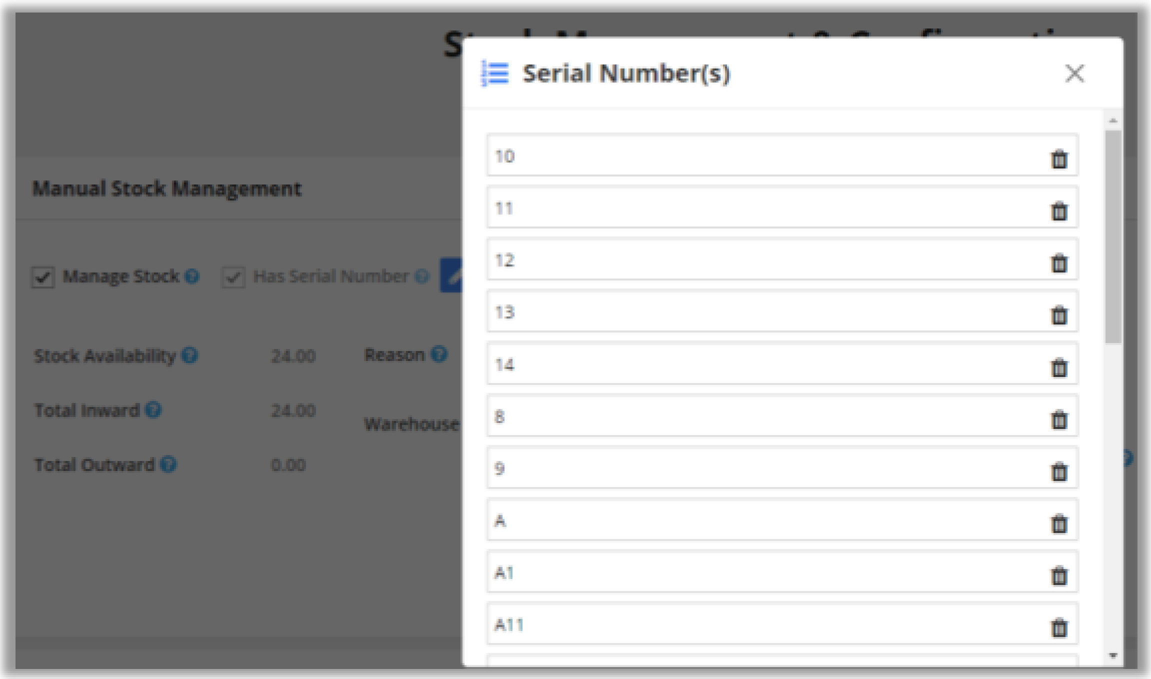
- You can insert the CSV file of the serial numbers and click on the Import button.
- Once you added the Serial Number, you will find the 'Save.' button to update the serial number, and if the serial number is not added click on the 'Add Serial Number' button beside the quantity field.



- If you are editing the product, you will get the 'editing' icon to edit the serial number.



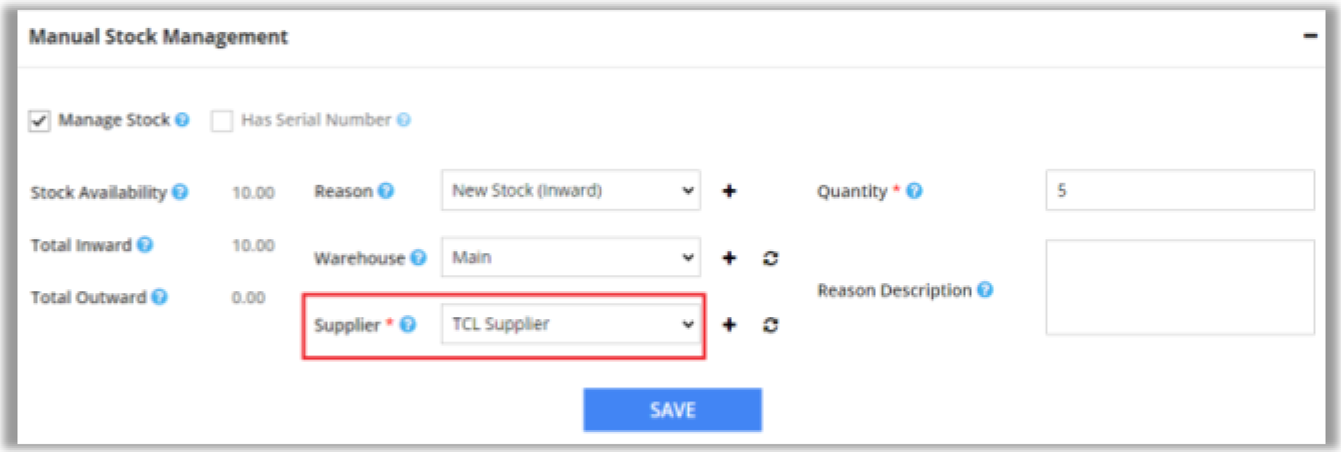
- You can edit the existing serial number and delete any serial number. After editing you need to click on the Update button.



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

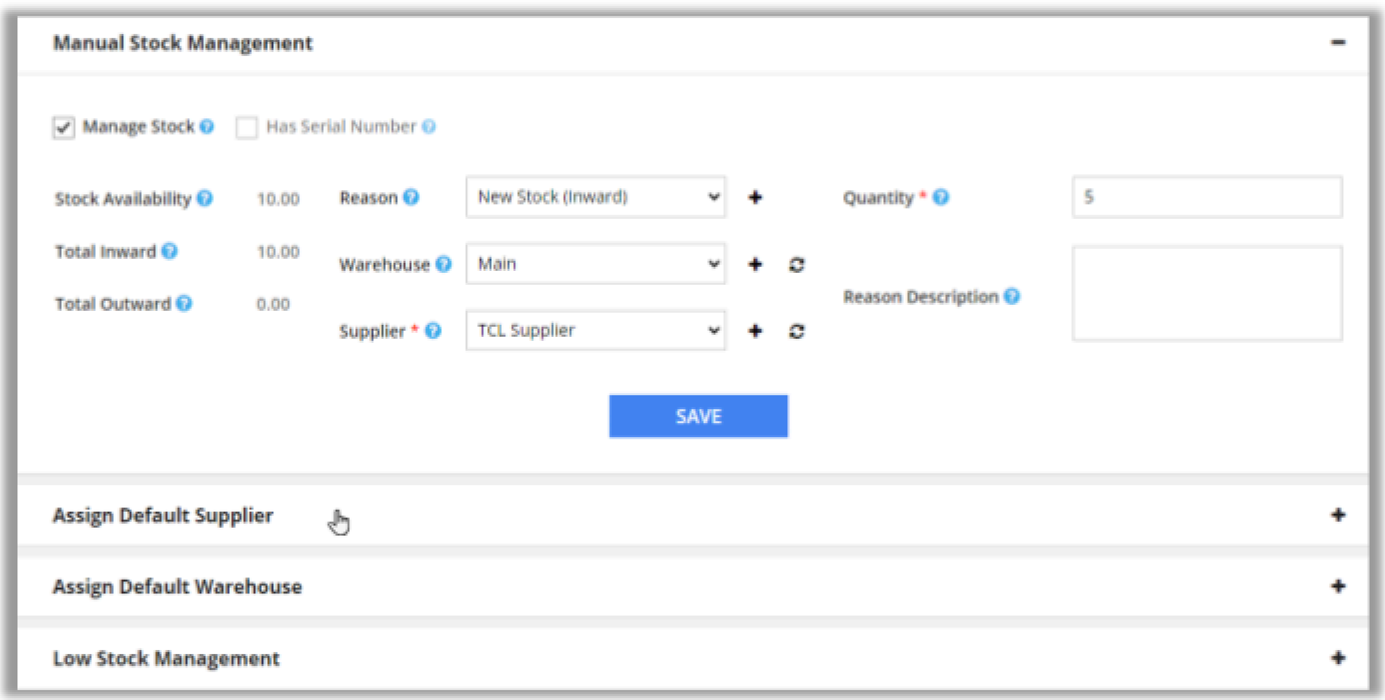
Supplier

- You need to select the suppliers to update the stock.

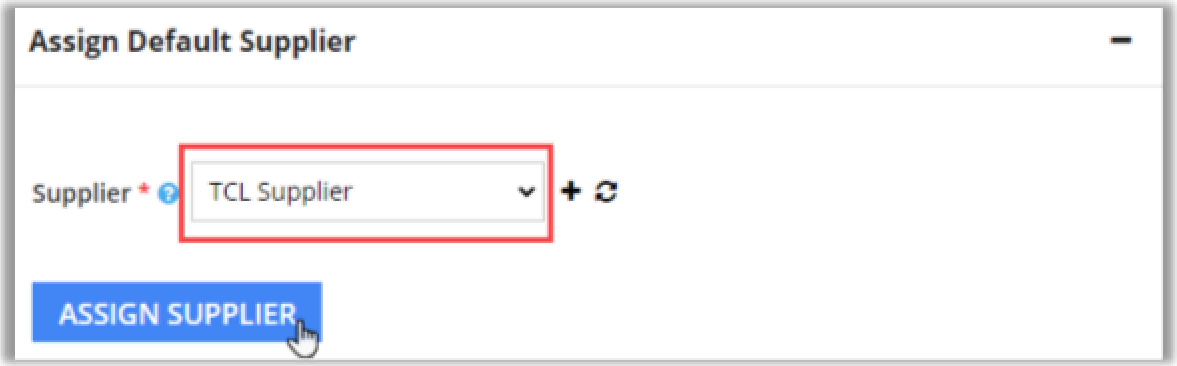


Assign Default Supplier

- You can assign the default supplier for the products.



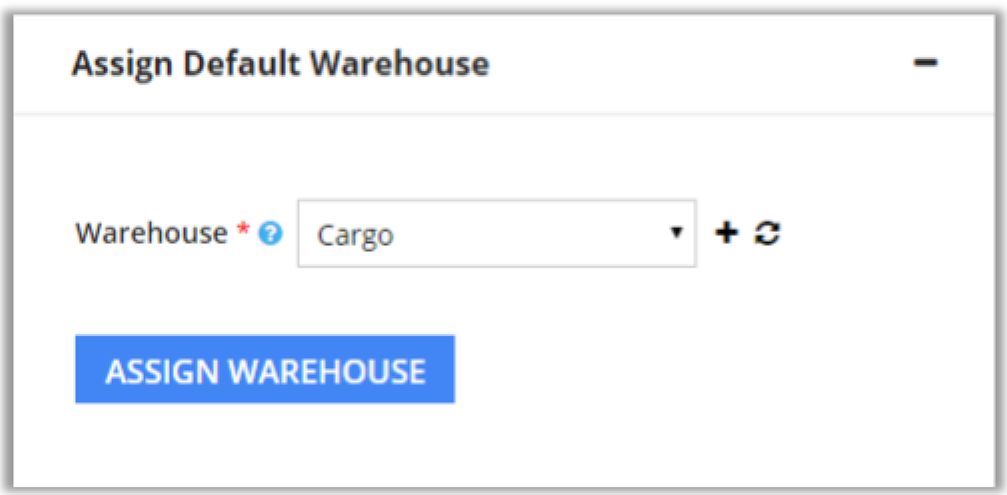
- To assign a default supplier to the product, select a supplier from the 'Supplier' dropdown list and click on the Assign Supplier button. The selected supplier will be assigned as the default supplier to the product.



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

Assign Default Warehouse

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

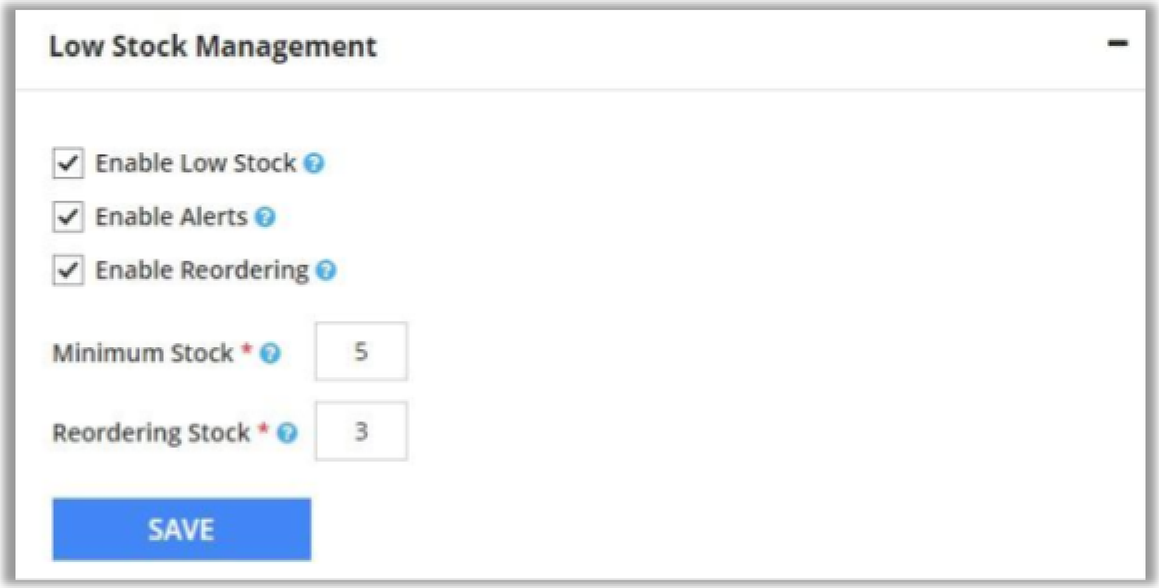


- Thereafter click on the 'Assign Warehouse' button to add the warehouse to the list.
- Additionally, you can also manage warehouses (Add, View or Delete) by clicking on the 'Warehouses' button from the 'MANAGE WAREHOUSES' module on the Products listing page.

<u>Note</u>: 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 the purchase order is created of it when a product goes below the defined mark.



- You can also enable alerts for the low stock by checking the check box to ‘Enable Alerts’. On enabling alerts, the user gets a message on opening the product detail page stating the product to be in low stock.

- Product reordering can be also managed by enabling the reordering option. By enabling this option, automatically PO is generated with the assigned default supplier for the product.

- Mention low stock limit for that product in ‘Minimum Stock’.

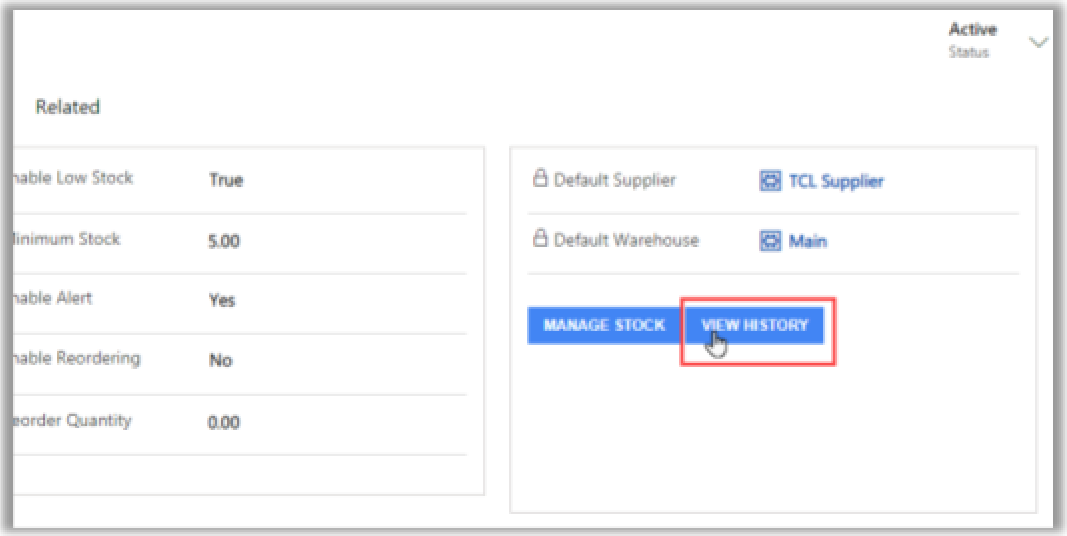
- Mention reordering stock quantity for that product in ‘Reordering Stock’.

- Click on the ‘Save’ button.

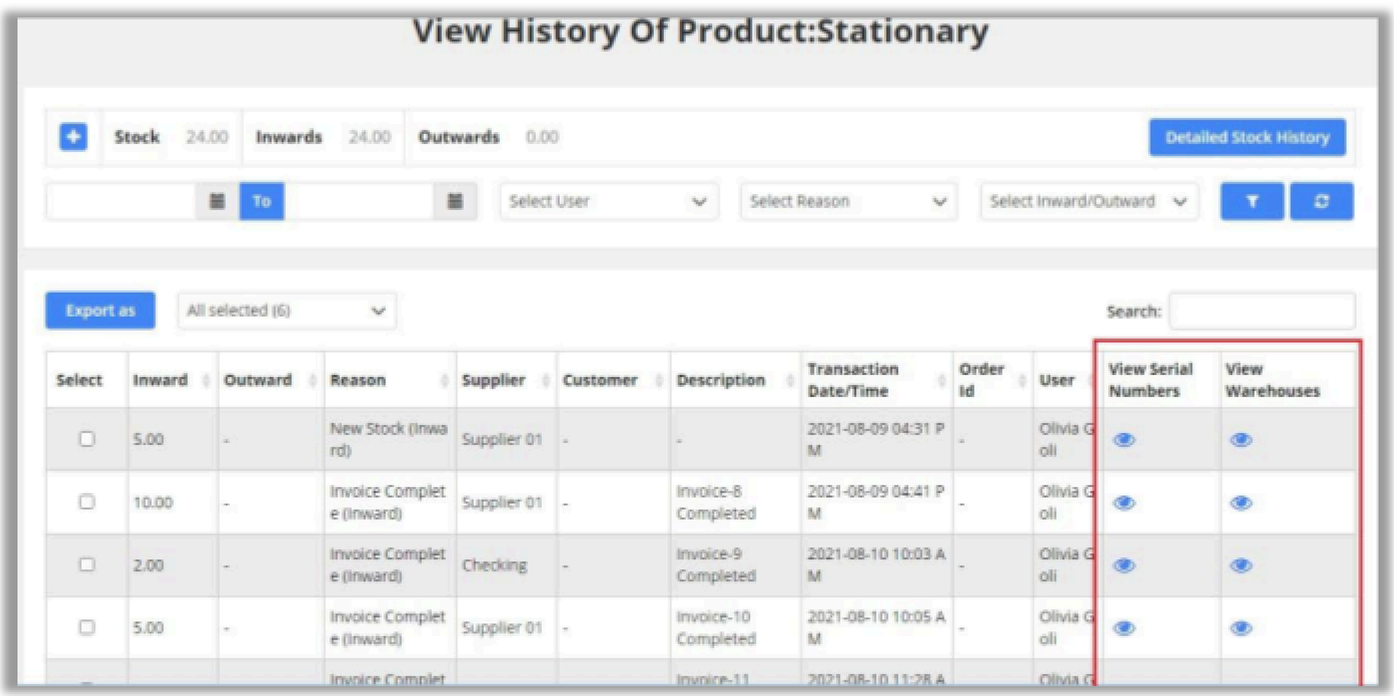
Note: Reordering stock can be enabled only if the product has a price list associated with it and has a default supplier assigned.

View History

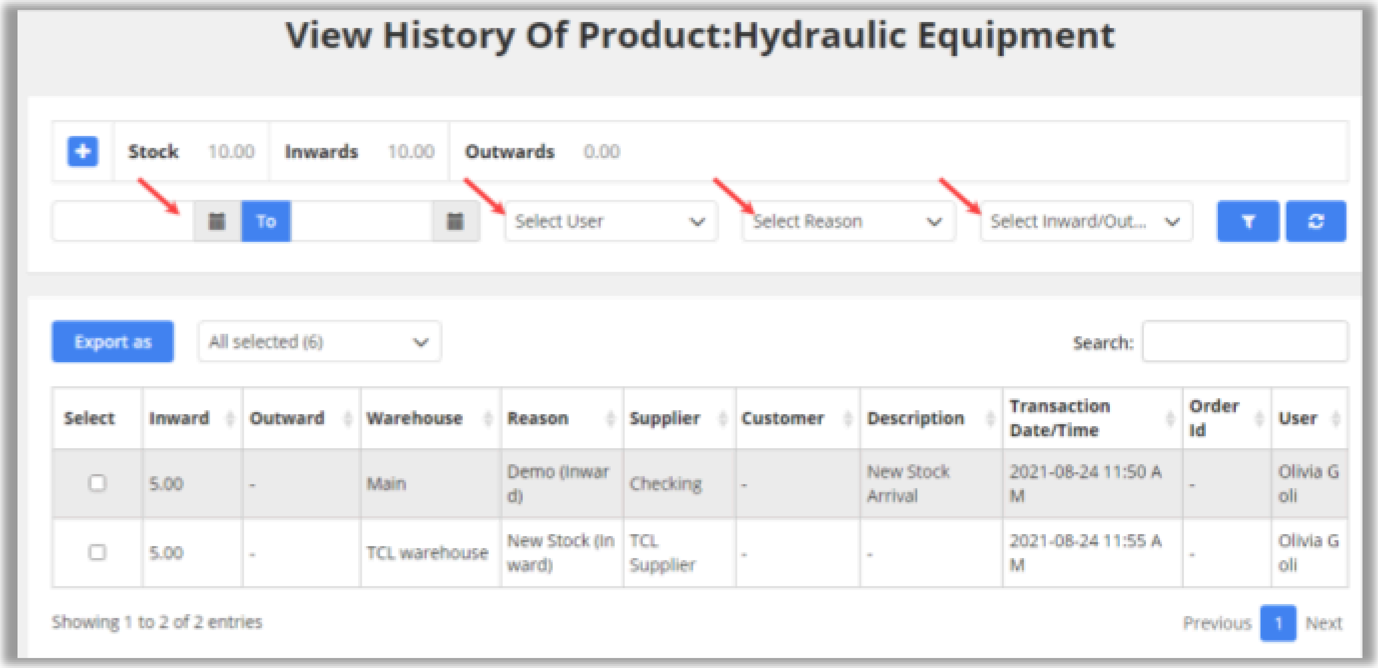
- You can view the stock transaction history of the product by clicking on the 'View History' button from the Product Details page under Stock Management Panel.



- This will open a new window displaying the Stock Transaction History of the product with full information of incoming and outgoing stocks.
- If the product is serial number enabled, you will see View Serial Numbers and View Warehouse columns in the View History grid. The view icon is provided to view the detail of the specific stock transaction.

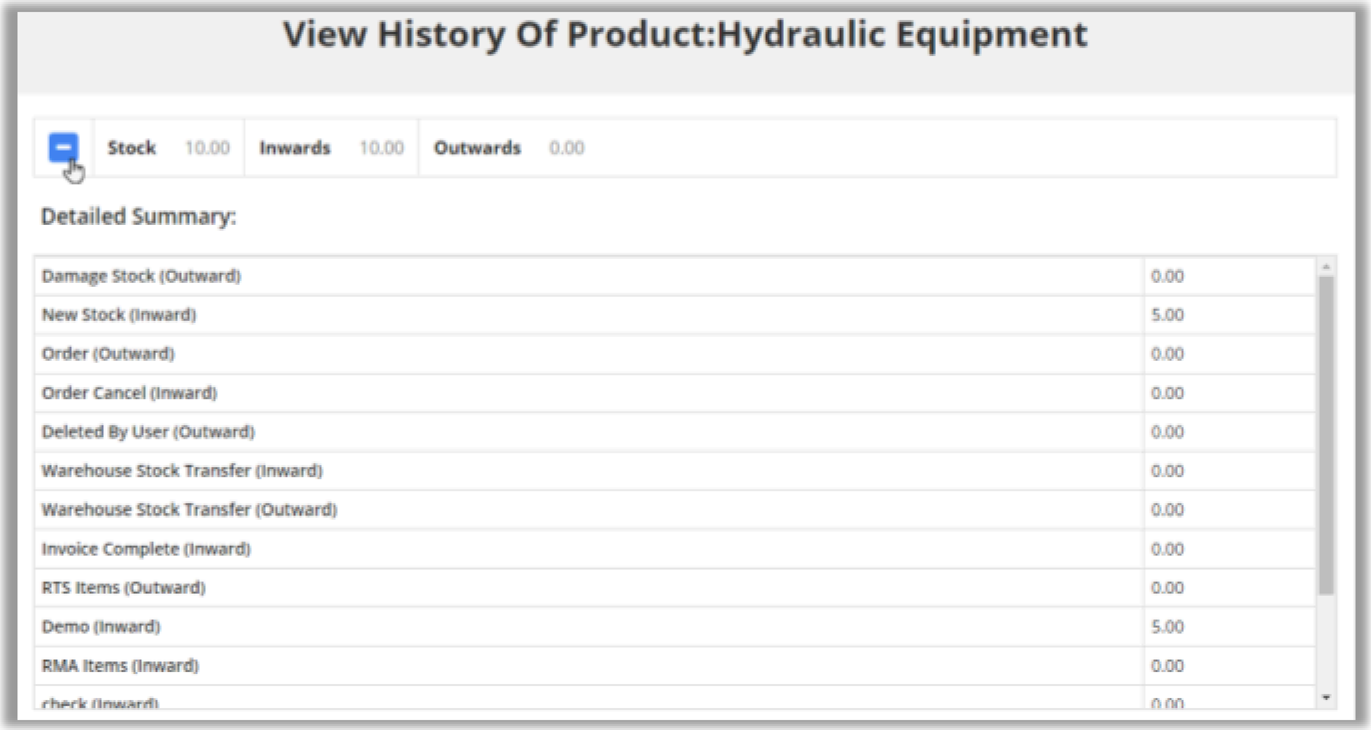


- You can filter the Transaction history as per the following filters:
  - **Date Range**: Select the date range between which you wish to view transactions.
  - **User-wise**: Select multiple users to get transaction details user-wise.
  - **Reason-wise**: Select multiple reasons to filter the list based on the reasons selected.
  - **Transaction-wise**: Filters list based on the inward or outward flow of products.

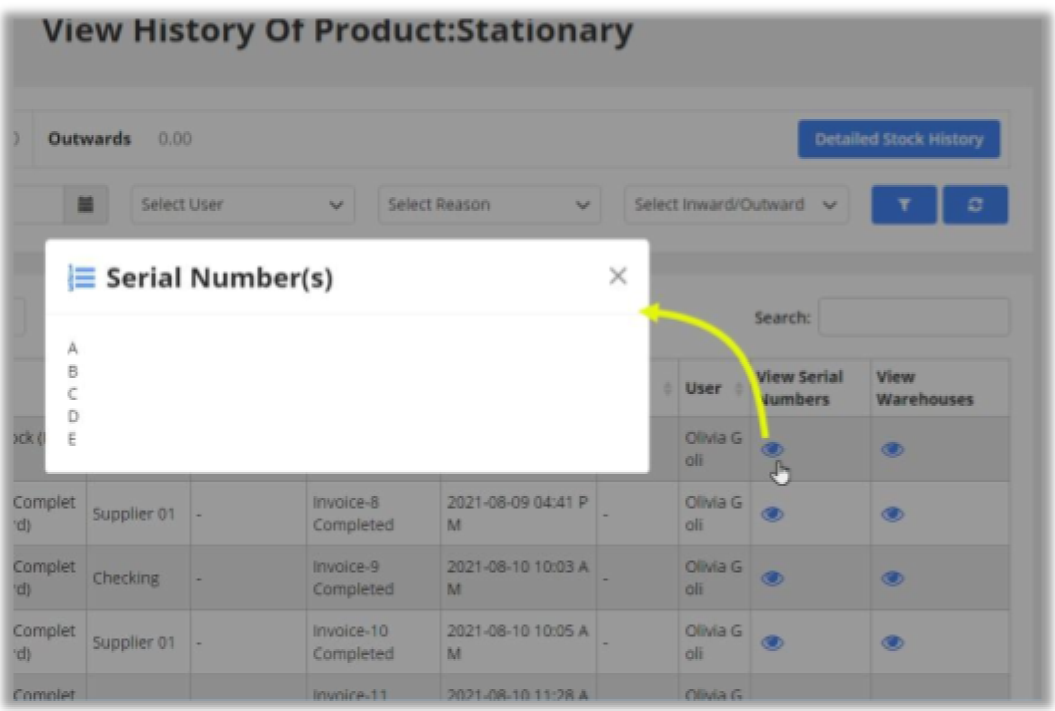


Detailed Summary

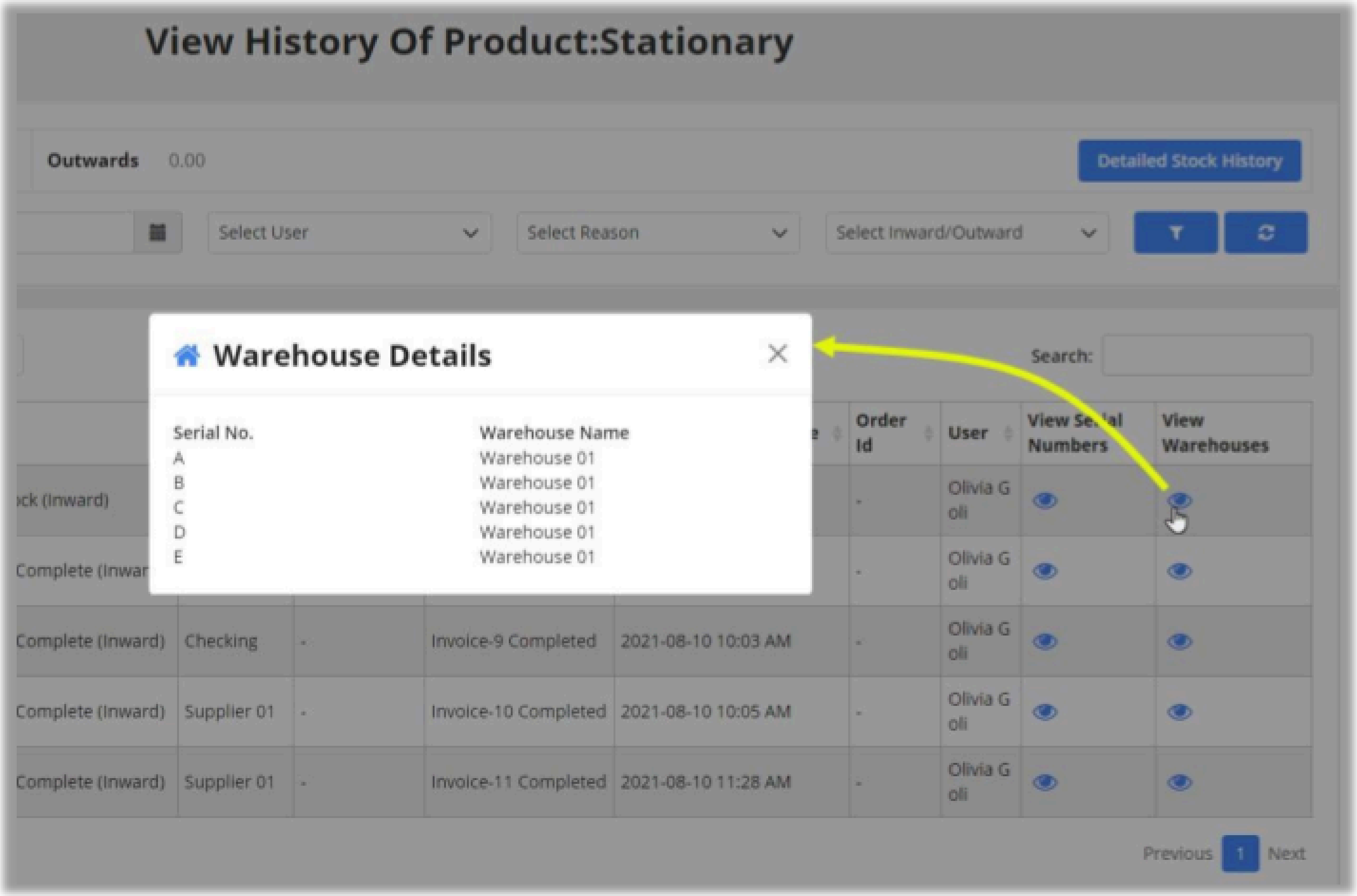
- You can view the “Detailed Summary” of product stock history by clicking on the ‘+’ sign on the top- left corner.



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



- You can also see the Warehouses, details of the specific stock transaction by clicking on the 'view' icon under the View Warehouses column.



Detailed Stock History

- For serial numbers enabled products, you can view a detailed transaction list of products along with serial numbers by clicking on the Detailed Stock History button.

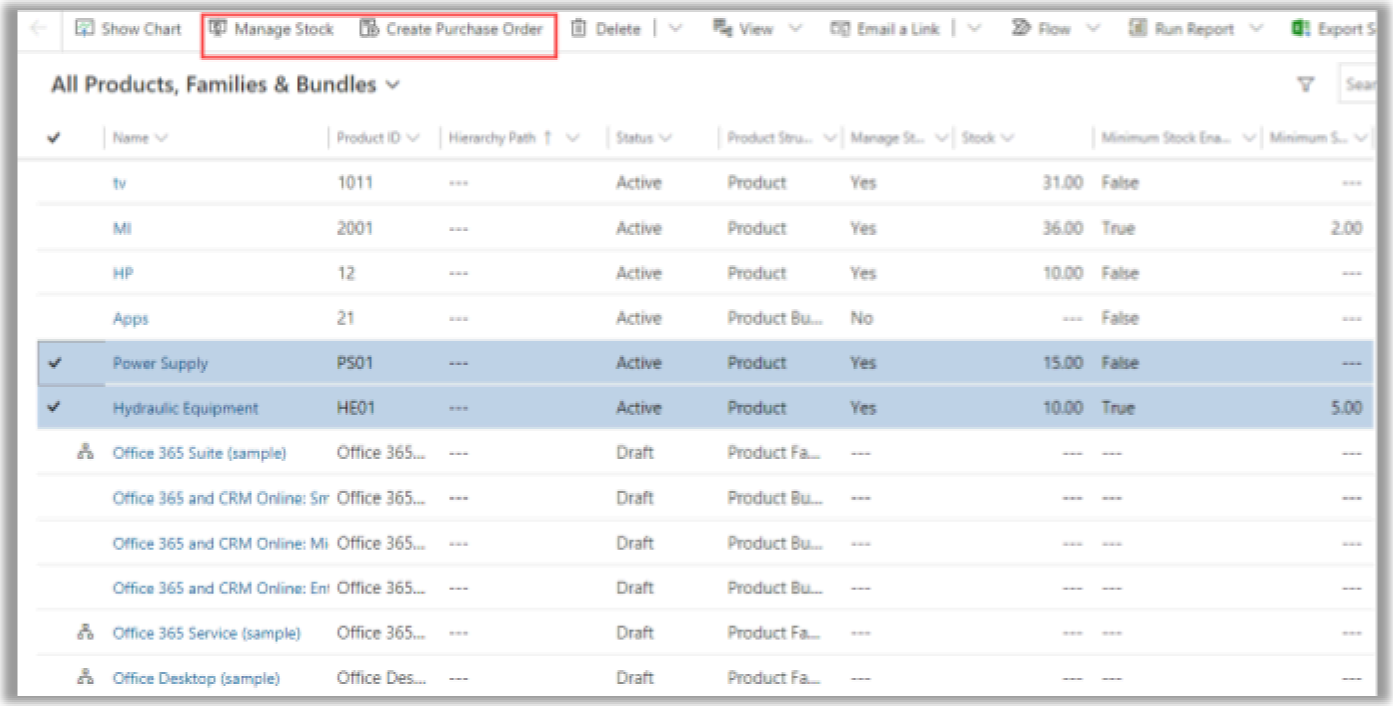

View Detailed History Of Product : Stationary

Export as | All selected (6) | Search:

Select	Serial Number	Inward	Outward	Warehouse	Reason	Supplier	Customer	Description	Transaction Date/Time	Order Id	User
☐	A	1.00	-	Warehouse 01	New Stock (inward)	Supplier 01	-	-	2021-08-09 04:31 PM	-	Olivia Goli
☐	B	1.00	-	Warehouse 01	New Stock (inward)	Supplier 01	-	-	2021-08-09 04:31 PM	-	Olivia Goli
☐	C	1.00	-	Warehouse 01	New Stock (inward)	Supplier 01	-	-	2021-08-09 04:31 PM	-	Olivia Goli
☐	D	1.00	-	Warehouse 01	New Stock (inward)	Supplier 01	-	-	2021-08-09 04:31 PM	-	Olivia Goli
☐	E	1.00	-	Warehouse 01	New Stock (inward)	Supplier 01	-	-	2021-08-09 04:31 PM	-	Olivia Goli
☐	A1	1.00	-	Main	Invoice Complete (inward)	Supplier 01	-	Invoice-8 Completed	2021-08-09 04:41 PM	-	Olivia Goli
☐	B1	1.00	-	Main	Invoice Complete (inward)	Supplier 01	-	Invoice-8 Completed	2021-08-09 04:41 PM	-	Olivia Goli
☐	C1	1.00	-	Main	Invoice Complete (inward)	Supplier 01	-	Invoice-8 Completed	2021-08-09 04:41 PM	-	Olivia Goli

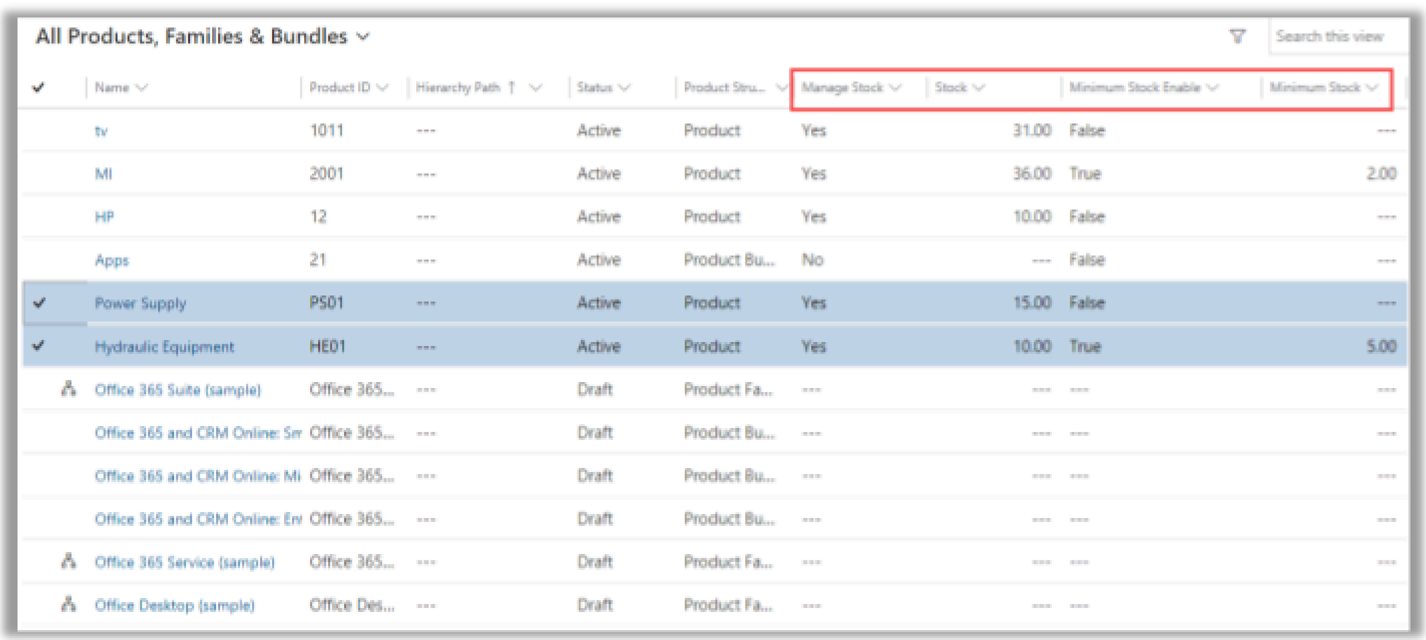
Product listing options

- You can Manage Stock and Create Purchase Order directly from the product listing page by selecting a single product or for multiple products.



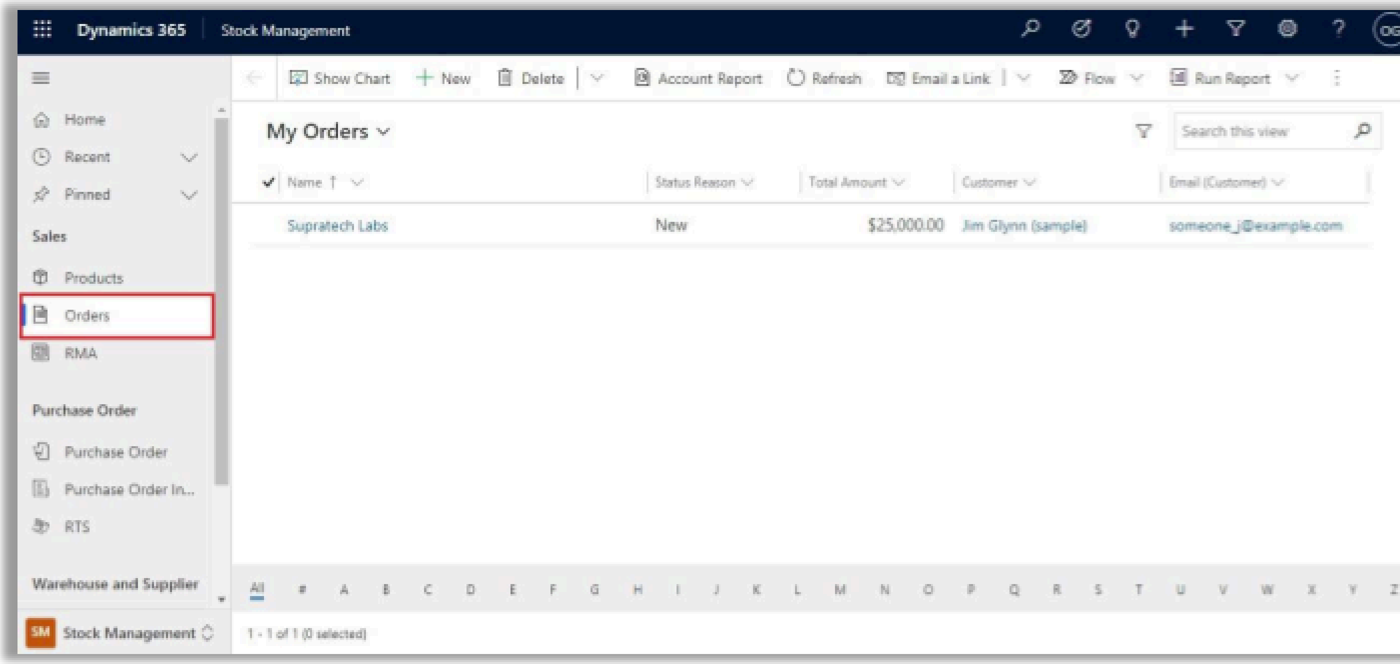
- The Reports and Charts are divided into three sections: General Reports, Product Based Reports, and Charts.

- From the product listing grid, you can find whether Manage Stock and Low Stock are enabled for a product or not. You can also check the Available stock and Minimum Stock Level.

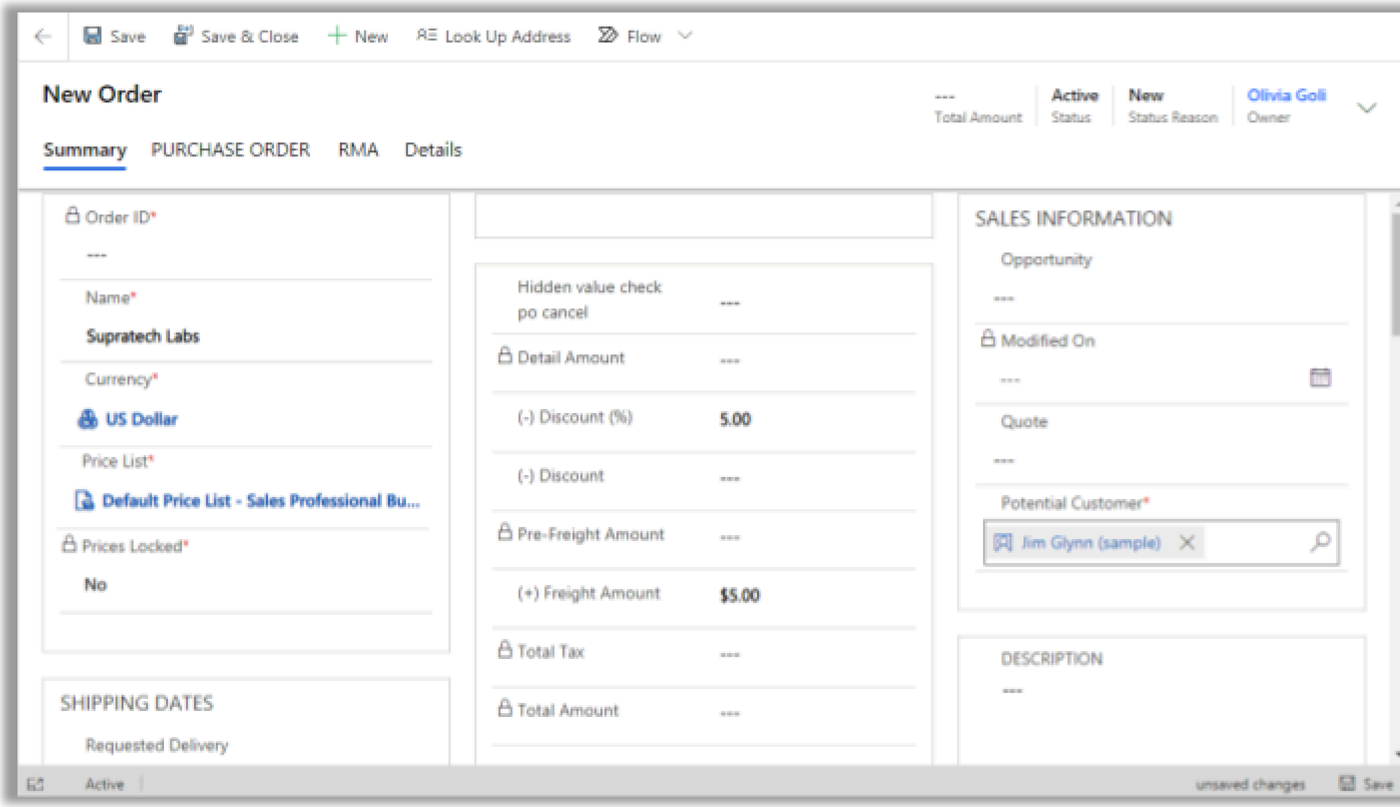


Orders

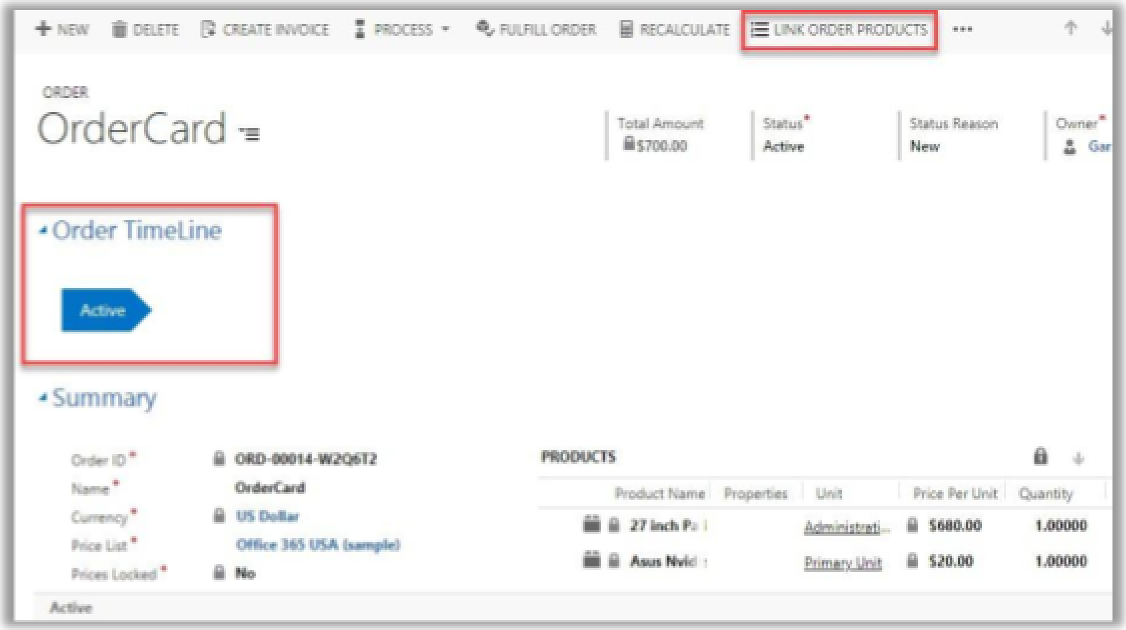
- You can check the sales orders from the Orders option under the "Sales" tab (Stock Management → Sales → Orders). You will get the listing of the sales orders.



- Now, click on the New option to insert a new sales order. By clicking on the 'New' and enter details such as Order Name, Currency, Value of Price List, Potential Customers, etc.

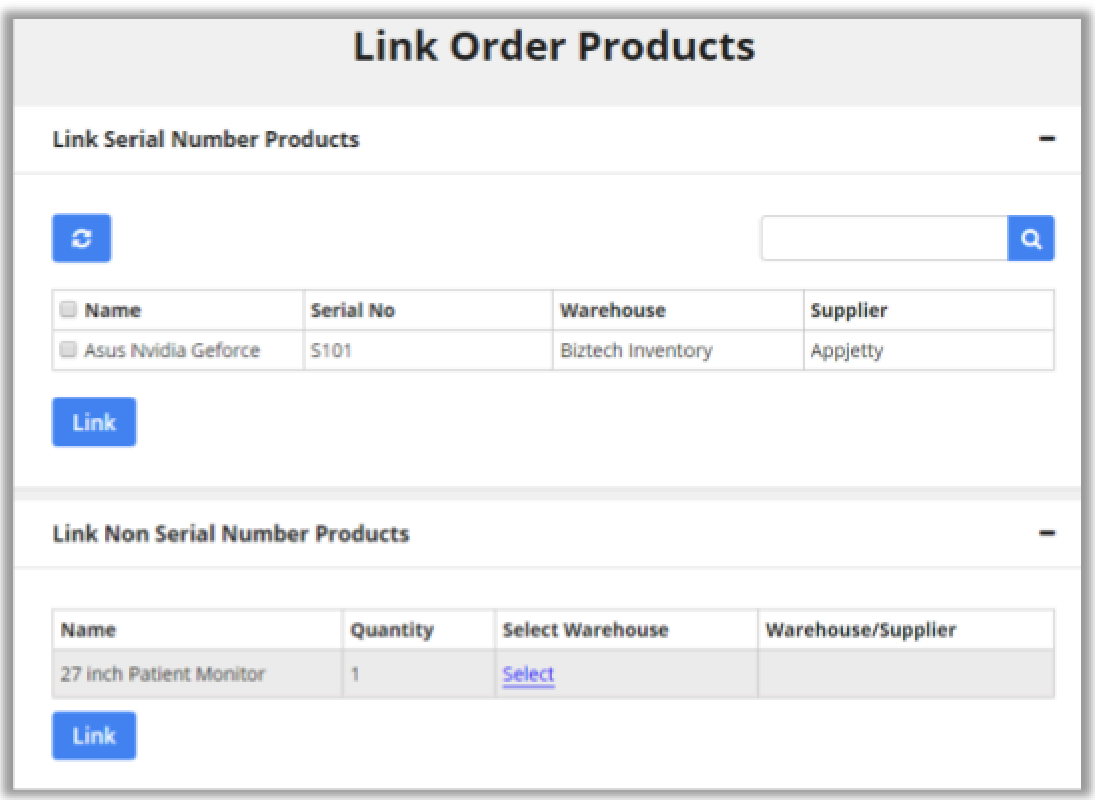


- Now in order to link serial numbers with the products and warehouses with the products without serial numbers, added in the order, click on ‘LINK ORDER PRODUCTS’.

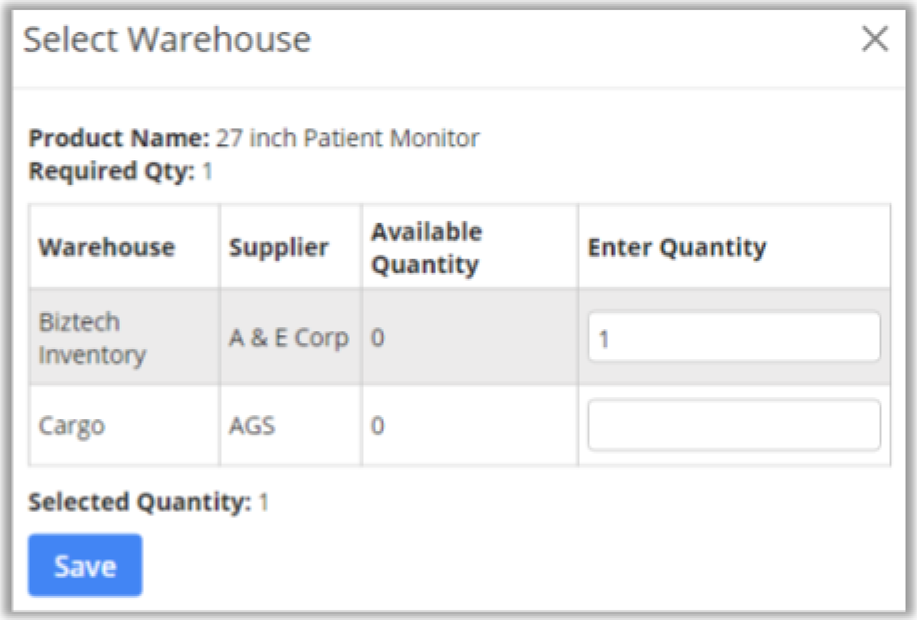


- This will open a popup with the list of serial number products and a list of non-serial number products.

- From ‘LINK SERIAL NUMBERS PRODUCTS’, select products which are to be linked and click on the ‘Link’ button.



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



<u>Note</u>:

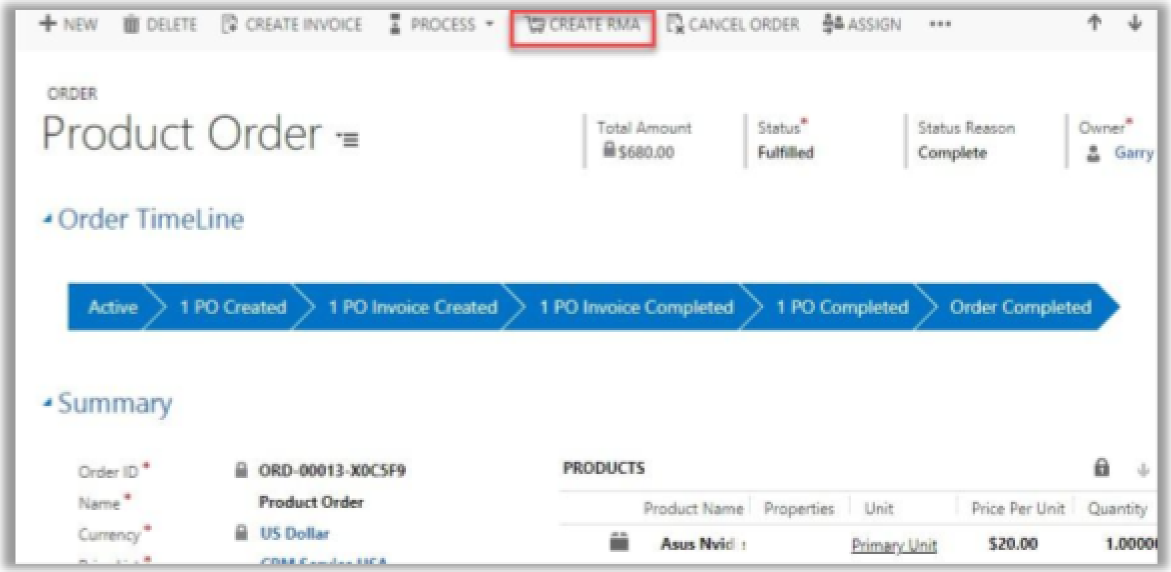
i. It will display products for which Serial Number is enabled under LINK SERIAL NUMBER PRODUCTS section and it will display products without Serial Number under LINK NON-SERIAL NUMBER PRODUCTS section.

ii. The warehouse selection section will only be displayed if the Warehouse module is enabled from the Configuration Settings.

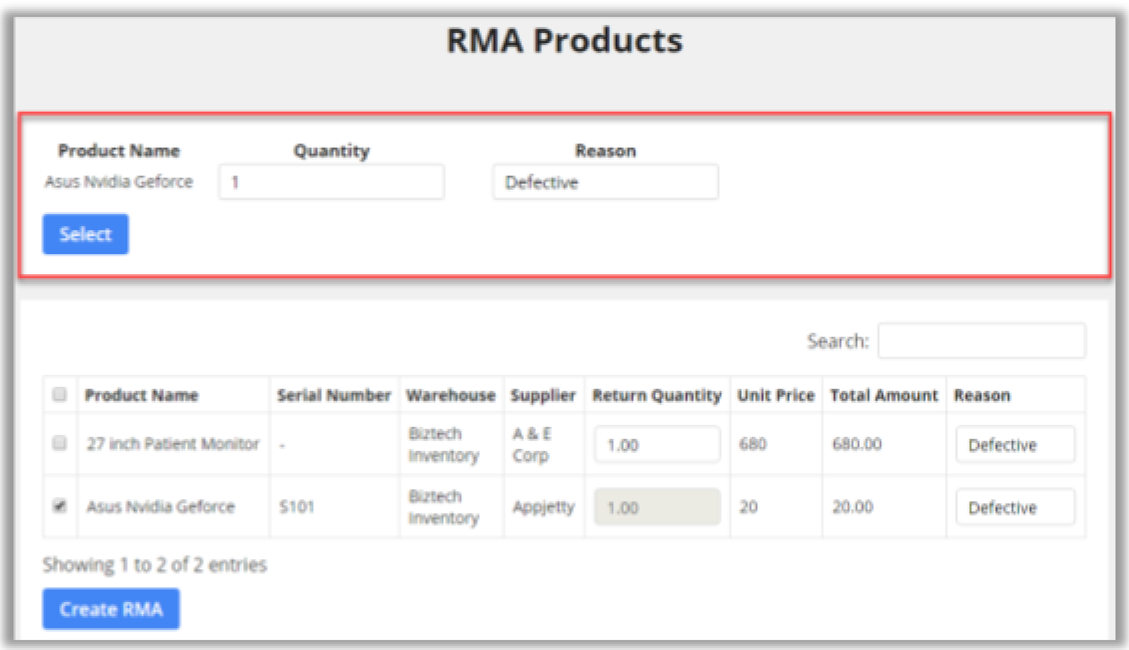
iii. For linking products, the selection of products should be the same as the quantity entered.

Generating RMA

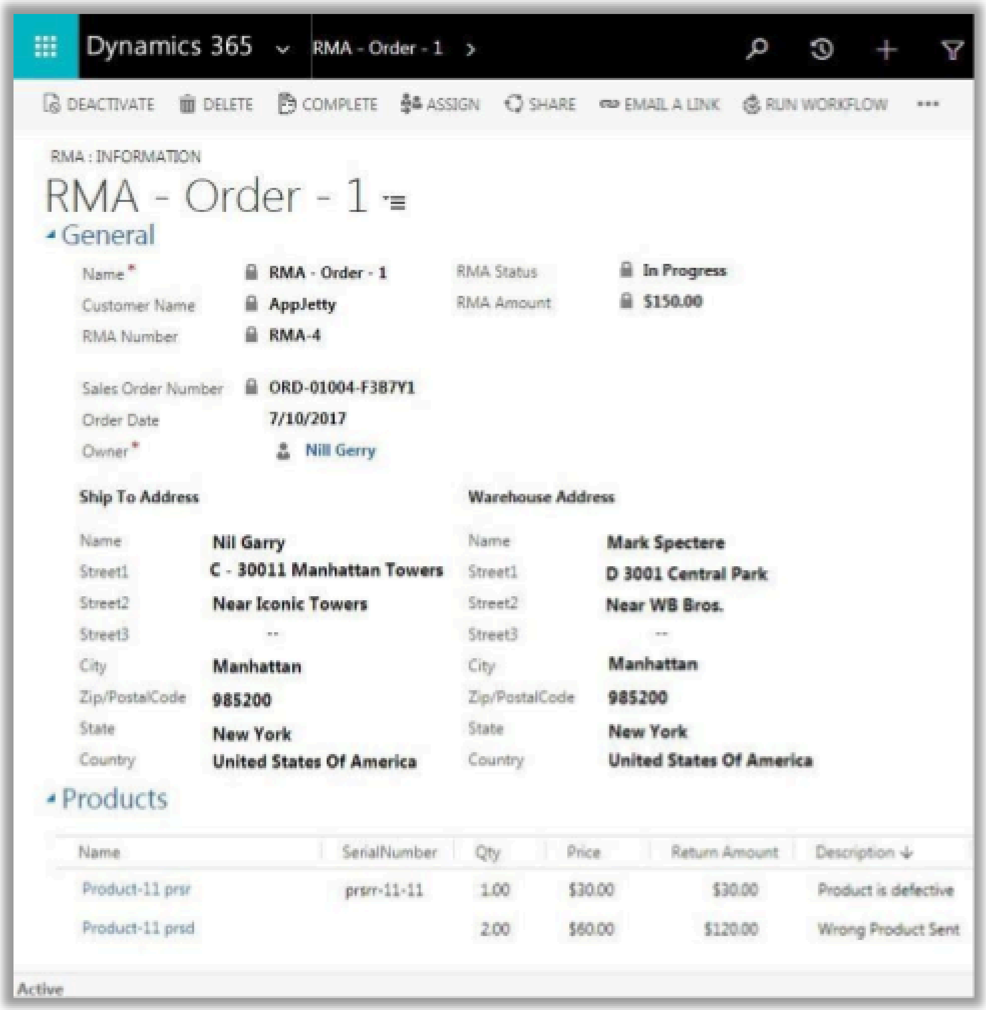
- Once you have fulfilled the order you can create an RMA for the same. To create an RMA, go to the detail view of the order and click on the 'Create RMA' button.



- 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.

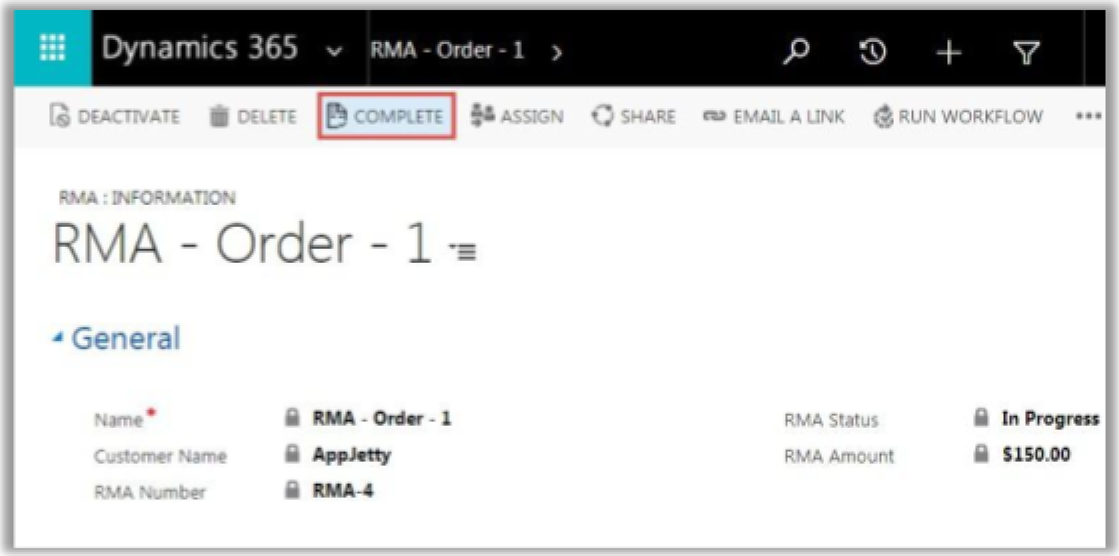


- Click on 'CREATE RMA', it will redirect you to RMA detail page. It will provide details of Sales Order, Shipping Details, Customer Name, Status etc.

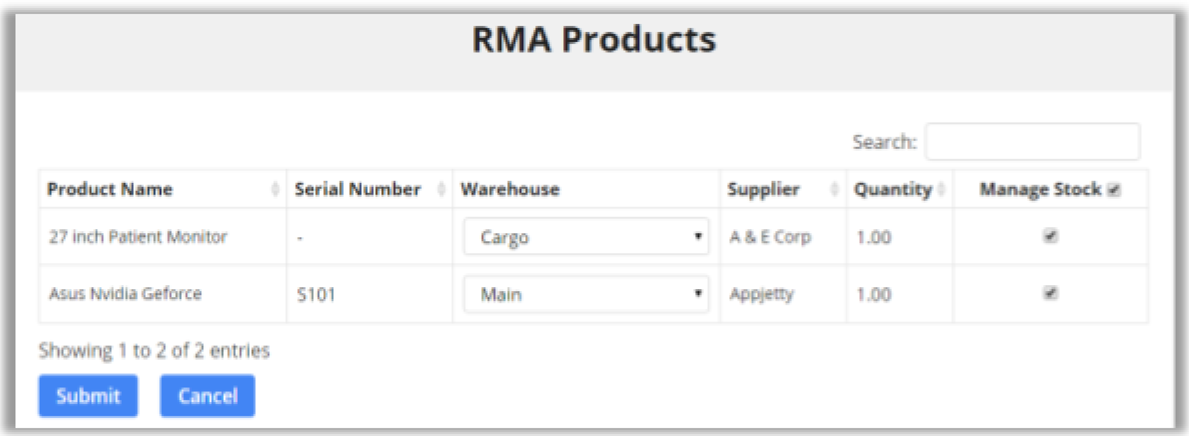


Note: Shipping Address will be inherited from the Sales Order and you need to provide the Warehouse Address.

- 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:

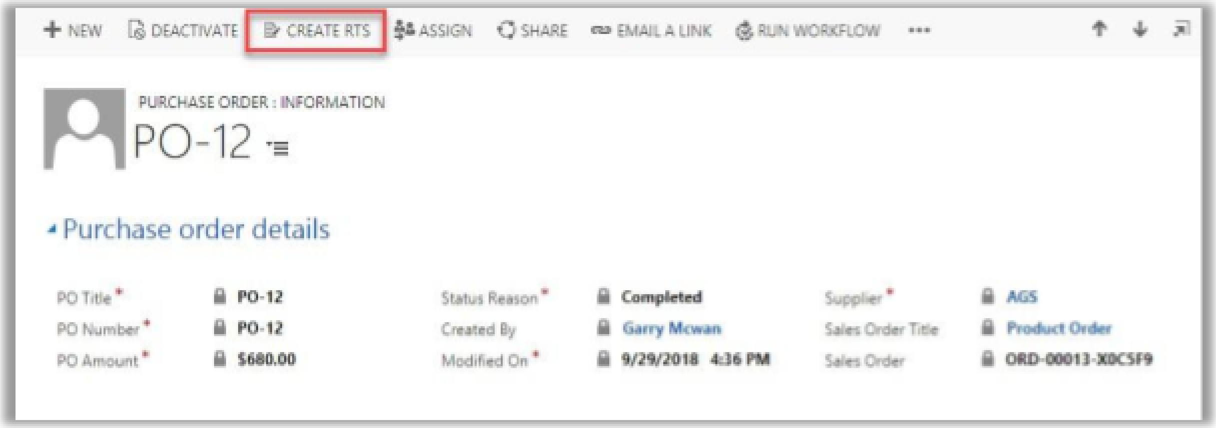
i. Warehouse column will only be displayed if Warehouse module is enabled from Default Configuration Settings

ii. Once the RMA is submitted you will not be able to manage the stock for products included in it.

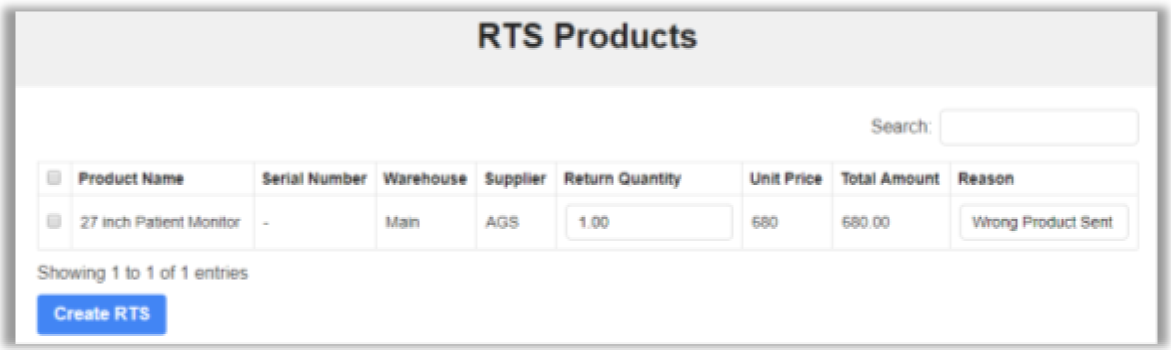
- Thereafter the RMA will be listed in the particular order and can be viewed from the Order Detail Page. Also, If the Credit - Debit Module is enabled from Configuration Settings it will track the financial transactions and inward or outward of the product amounts.

Generating RTS

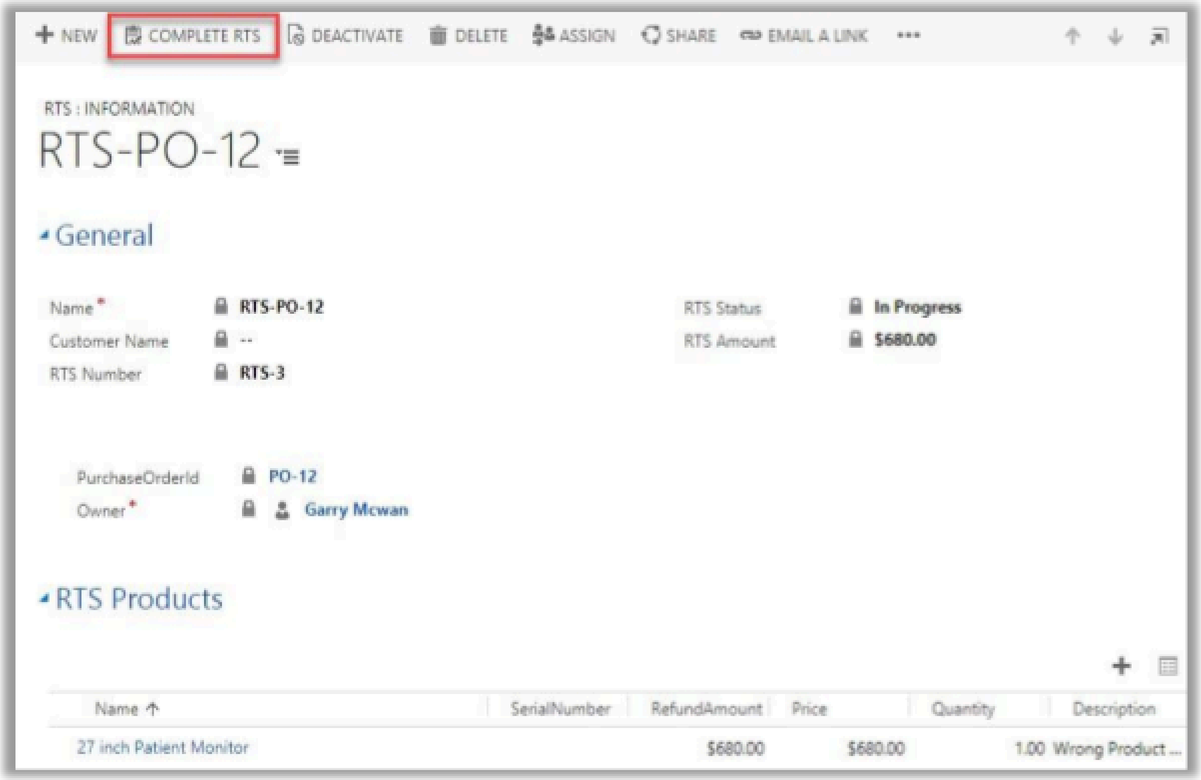
- Once purchase order has been fulfilled, you can create RTS for the same. To create RTS go to the detail page of Purchase Order and click on ‘Create RTS’ button.



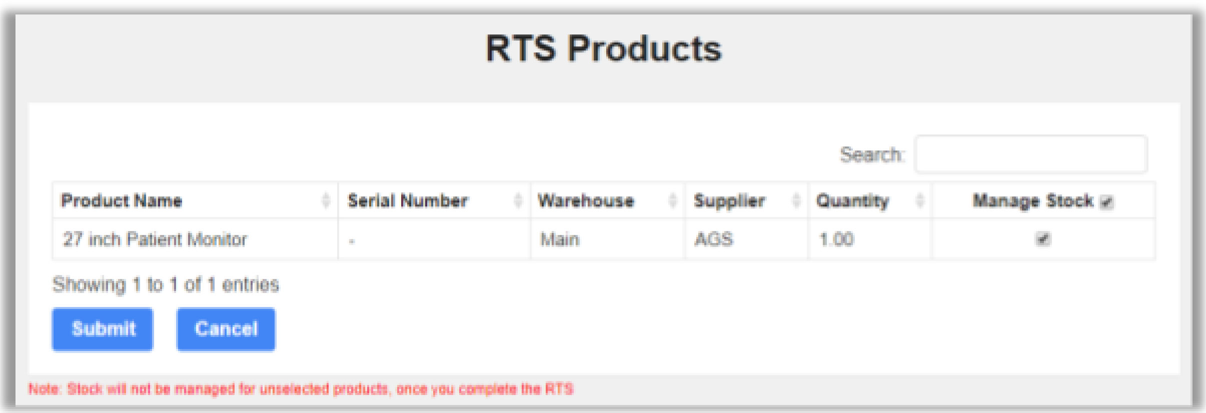
- New window will open with the listing of products included in purchase order. Select the products and enter reason for product return and click on ‘Create RTS’.



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



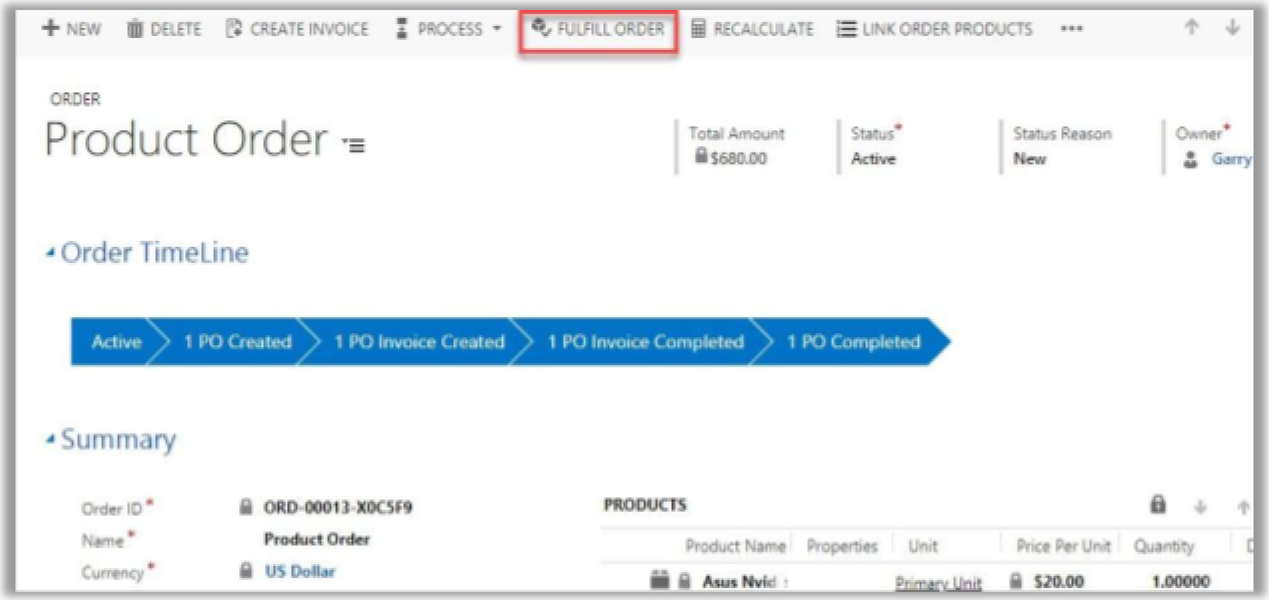
- Click on the Complete RTS option to complete RTS. On completion of RTS and selection of manage stock option, the stock will be outwarded from the inventory.



- 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.

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.

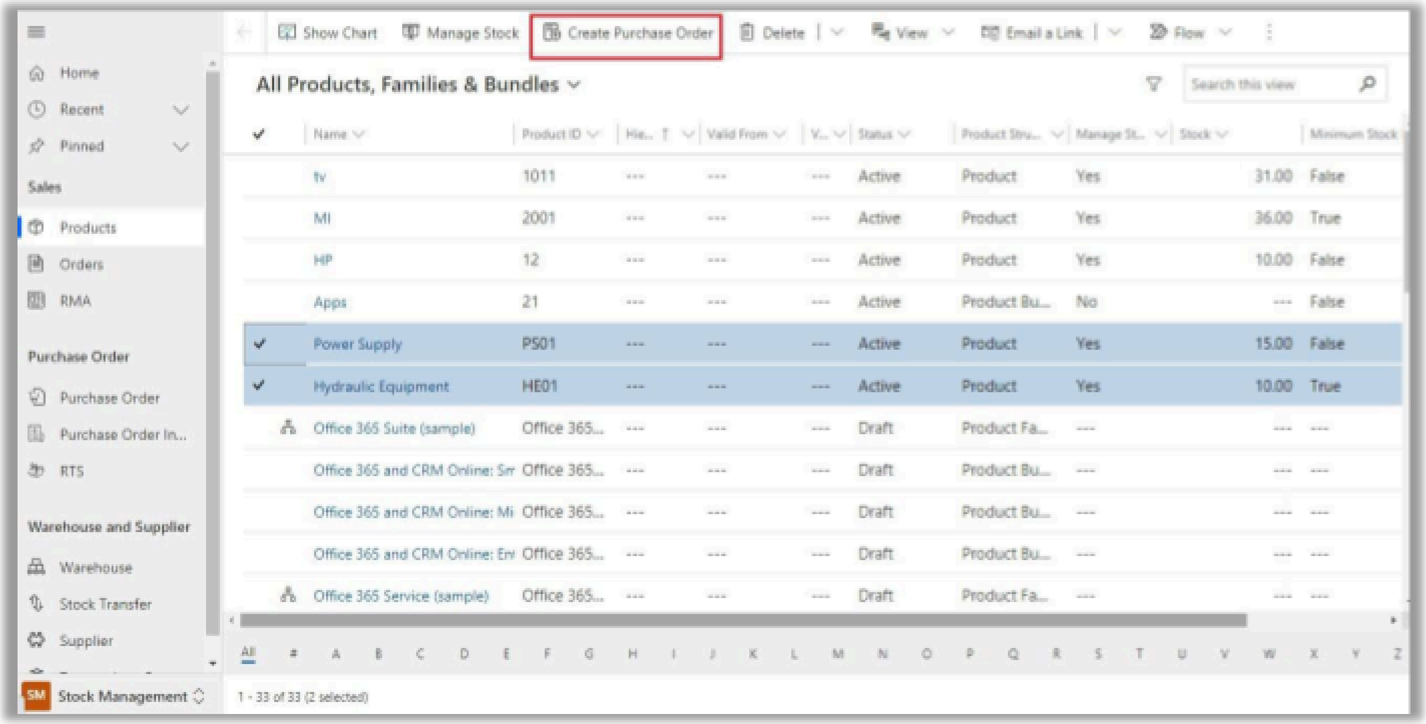


- Similarly, when you cancel a Fulfilled Order for products for which you have enabled stock management, the stock for that product will be updated automatically and the same will be displayed in the Stock Transaction History as well.

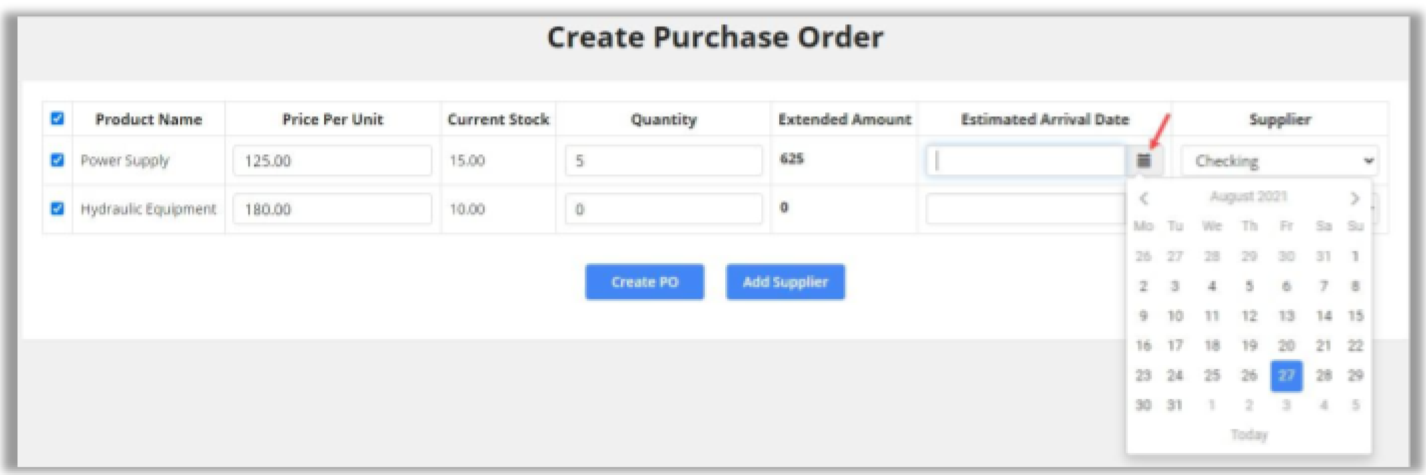
- Thereafter if you have enabled the Credit - Debit Module from Configuration Settings, it will track the financial transactions and inward or outward of the amount.

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.

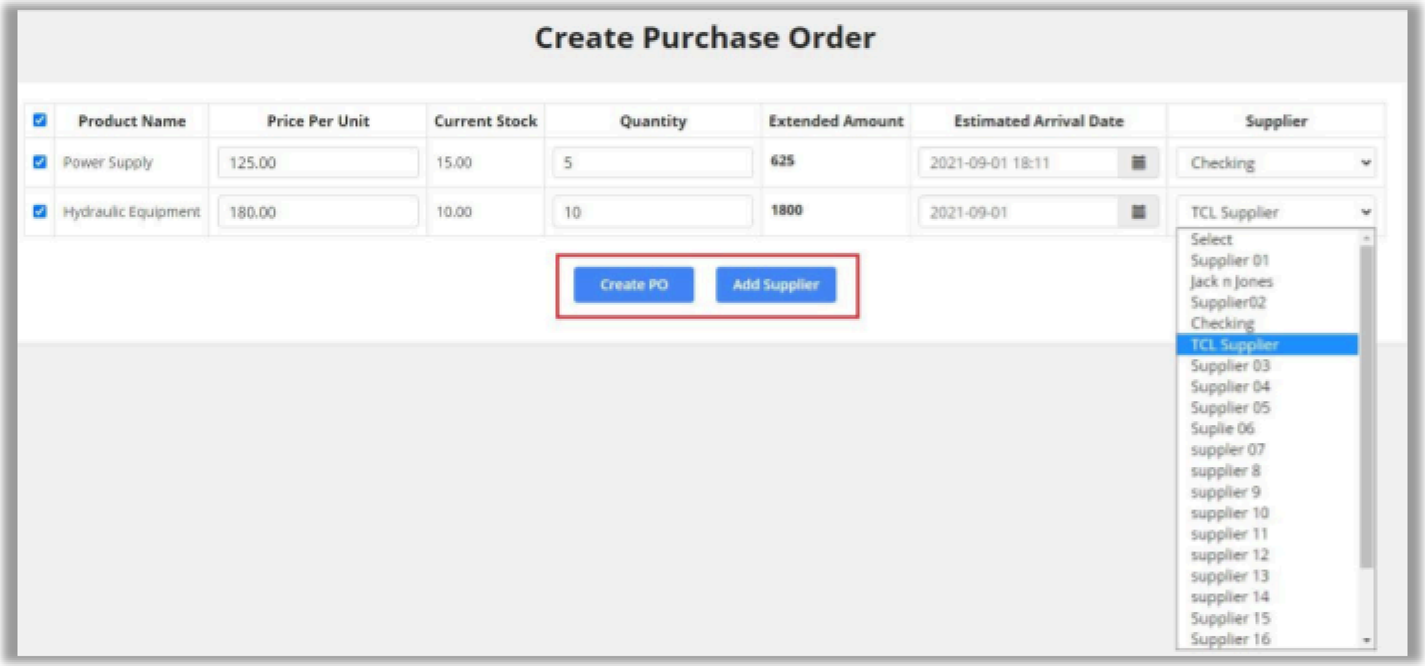


- By clicking on the Create Purchase Order, a new tab will open the form where you can see the selected products and insert the details for the purchase order. You will see the "Current Stock" of the product. You need to insert the "Price Per Unit" and "Quantity" of the product.



- The Extended Amount will be calculated as the "Price Per Unit" and "Quantity" are inserted. You need to choose the date for the "Estimated Arrival" of the products. By clicking on the 'calendar' icon, a calendar will appear, choose the date from it.

- You need to select the Supplier who will supply the products. If the supplier is not on the list and you want to create a new supplier, click on the Add Supplier button to add a new supplier.

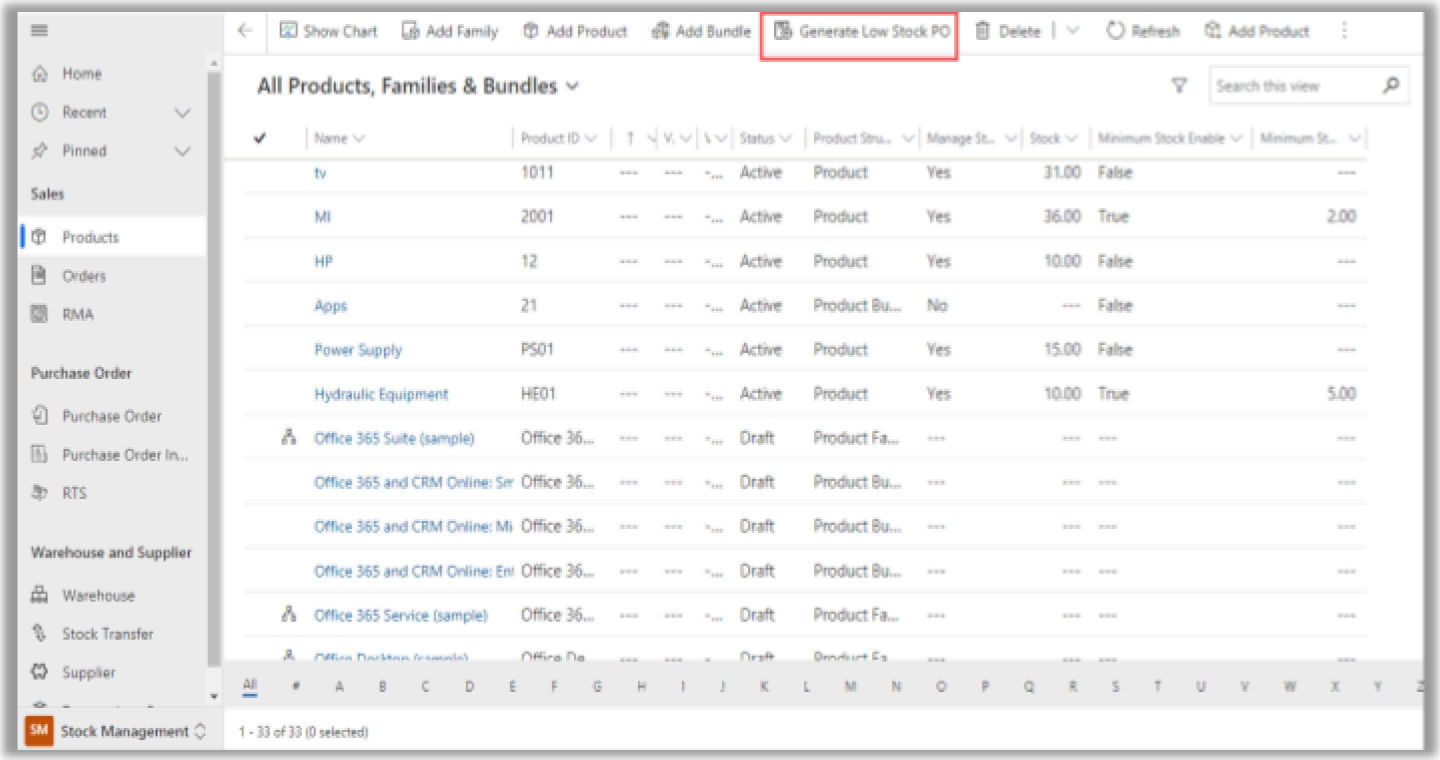


- Now, after inserting the details, click on the Create PO button to create Purchase Order.
- Once a P.O is generated, it will be displayed on the order page as shown in the reference screen below. Purchase Orders will be created, and visible as created PO's as shown below. Also, the order timeline will be updated.

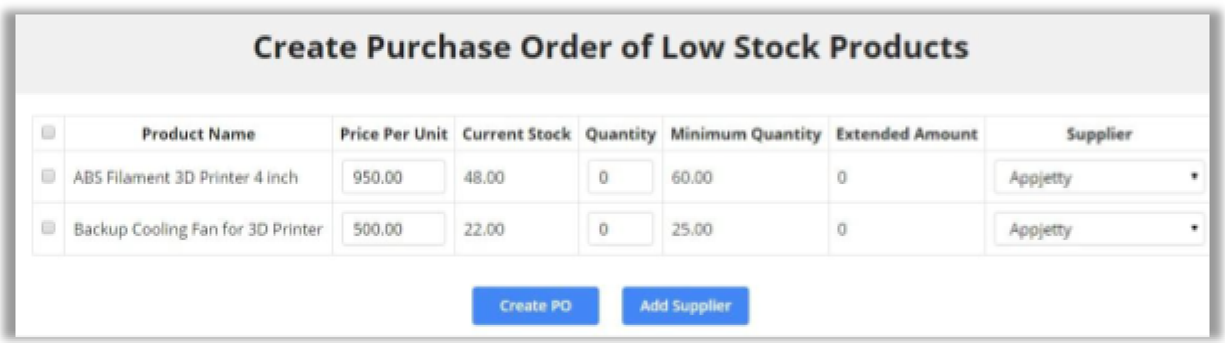
Note: After generating the Purchase Order you can also create Purchase Order Invoice for the same.

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.



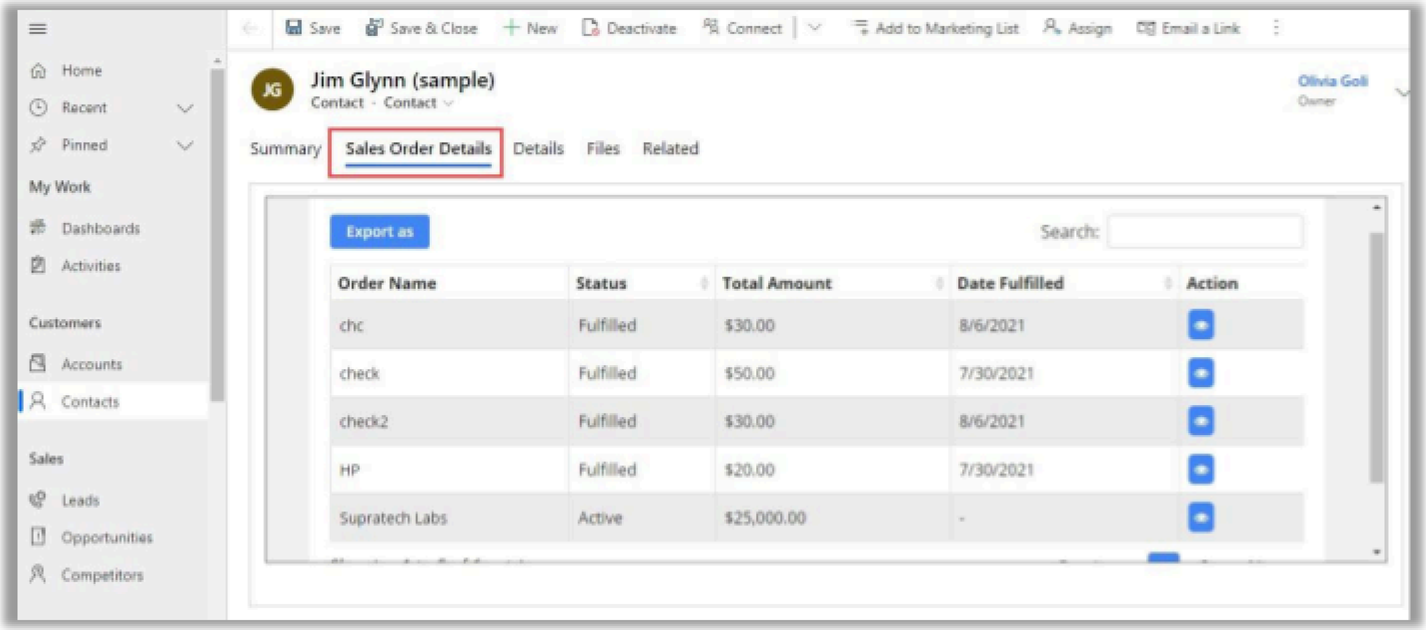
- To generate PO for low stock products, click on 'GENERATE LOW STOCK PO' as shown in the reference screen.
- Clicking on 'GENERATE LOW STOCK PO' will open up a new window in which you can select suppliers for each product.



- 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 from the dropdown list.
- Clicking on the 'Create PO' button will create Purchase Orders based on the selection of suppliers and a success message will appear. Click on the 'OK' button to continue
- Follow the similar steps as above to create an invoice and complete the PO.
- On completing the Purchase Invoice, the stock will be updated automatically.

Contacts

- You can check the sales order details from the CRM Contacts records. By clicking on any contact record, you can see the Sales Order Details tab on the contact detail page.

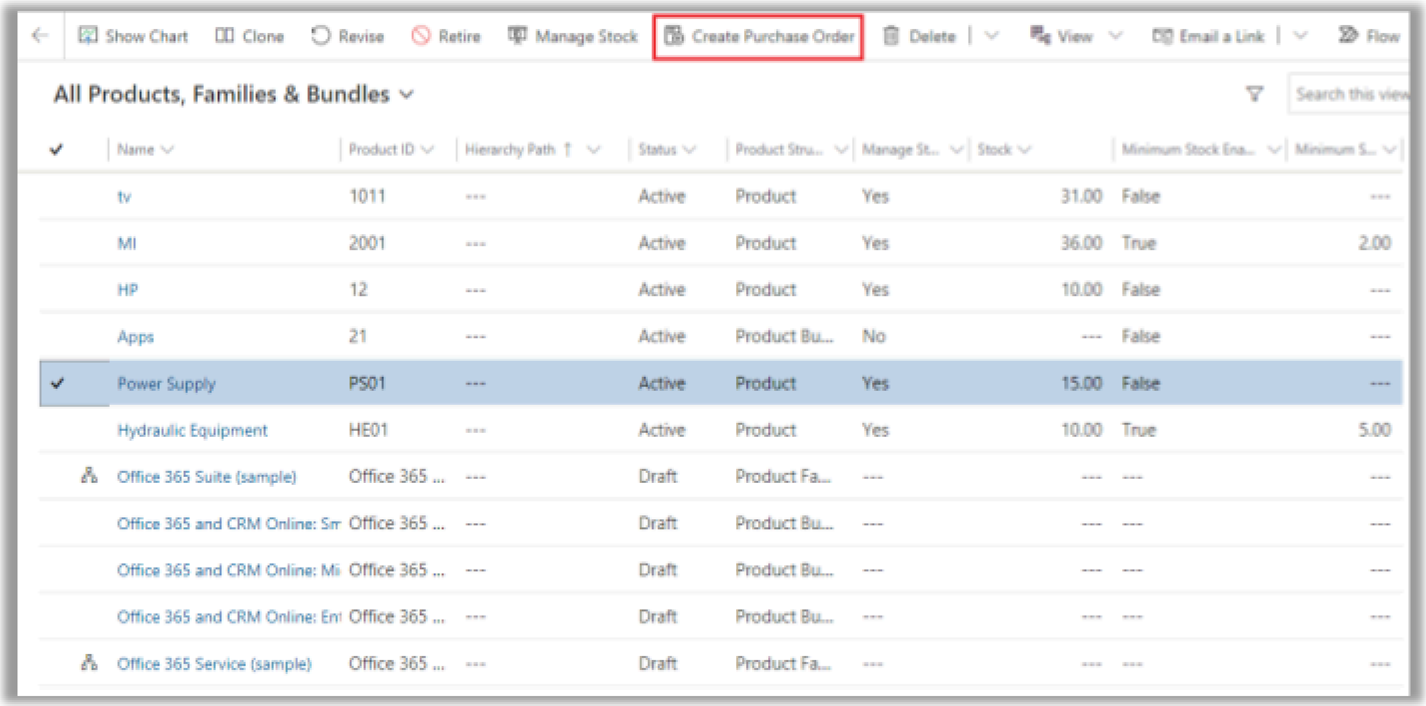


- By clicking on it, you will see the sales orders for the contact.

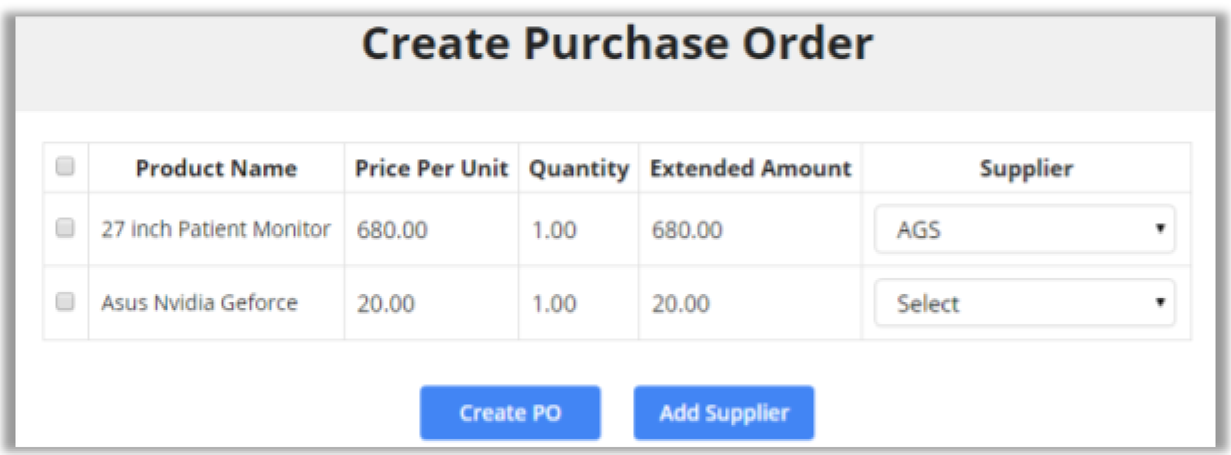
Purchase Order

Create Purchase Order

- After adding the products, to generate the Purchase Order click on Create Purchase Order which is available on the CRM ribbon.



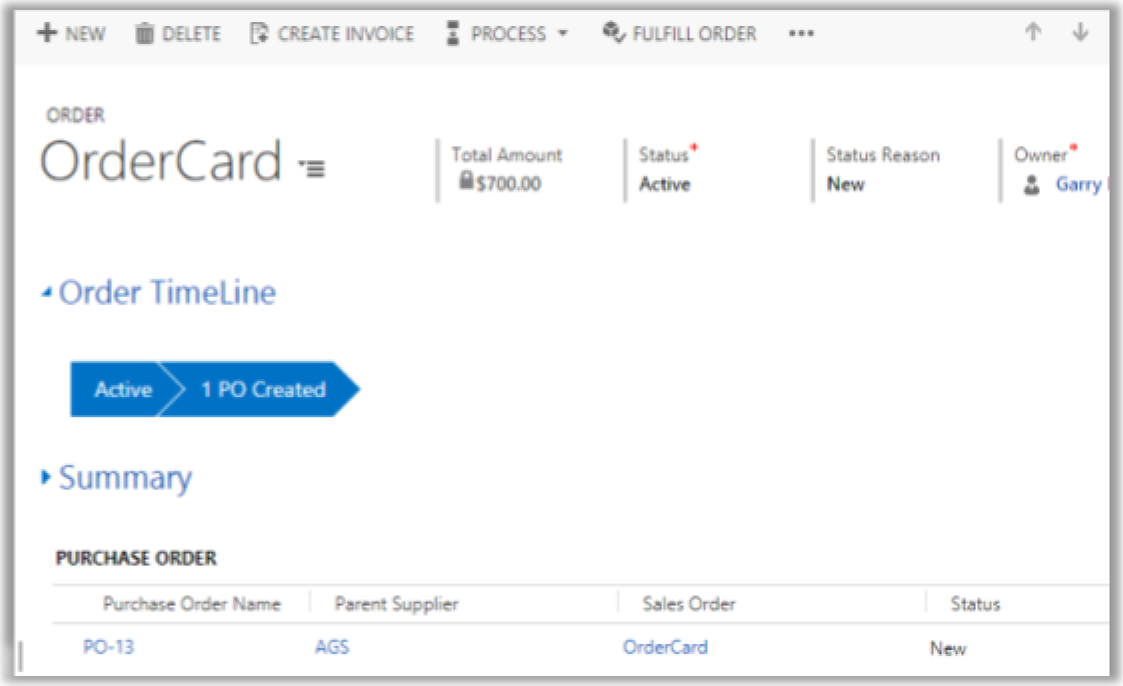
- By clicking on the ‘Create Purchase Order, a new window will open in which you can select a supplier for each product.
- If you have already assigned a supplier to a product then that supplier will be selected by default and if you want to change the supplier, then you can select a supplier from the dropdown list.



- You can also add a new supplier by clicking on the ‘Add Supplier’ button.

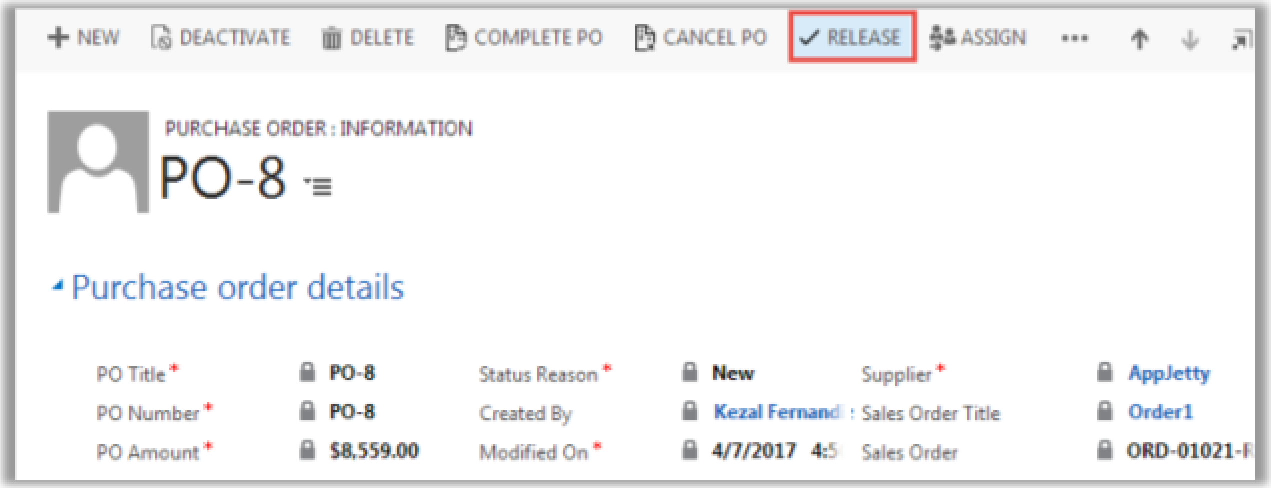
- Select the products and click on the 'Create PO' button. This will create a Purchase Order based on the selection of suppliers and a success message will appear. Click on the 'OK' button to continue

- 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.

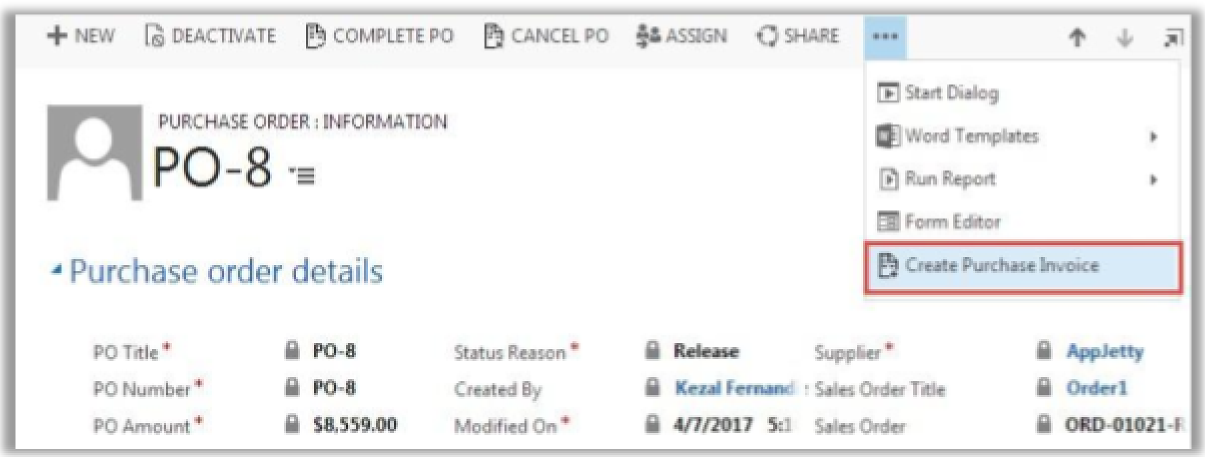


Creating Purchase Invoice

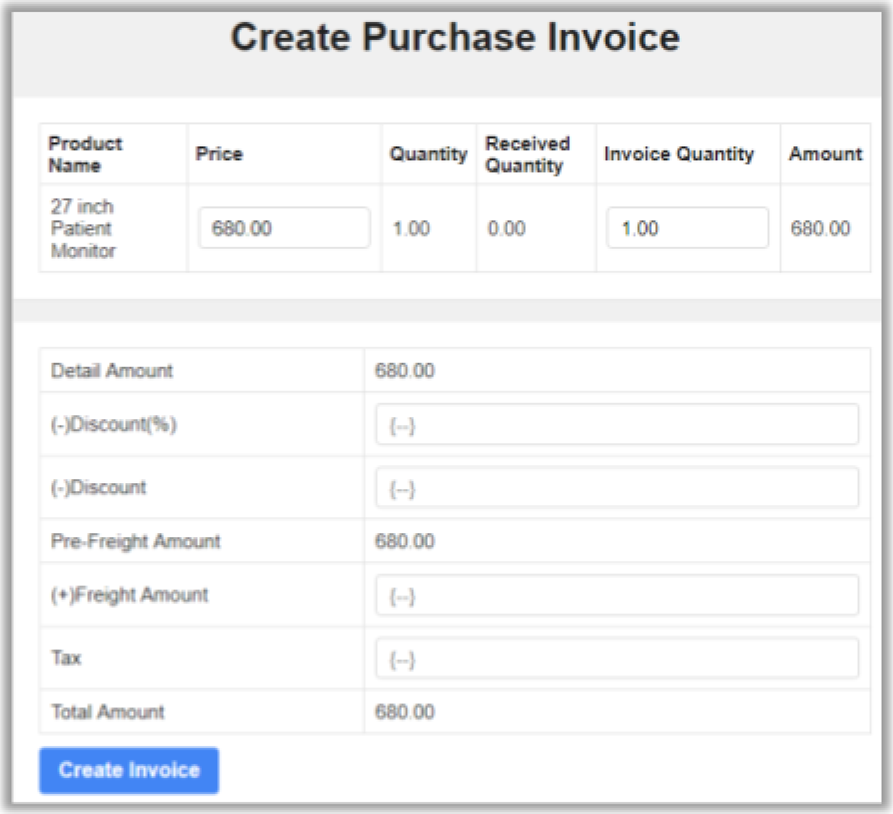
- To create a Purchase Invoice, go to the Purchase Order detail page and click on ‘RELEASE’ to release the Purchase Order and enable Purchase Invoice Option



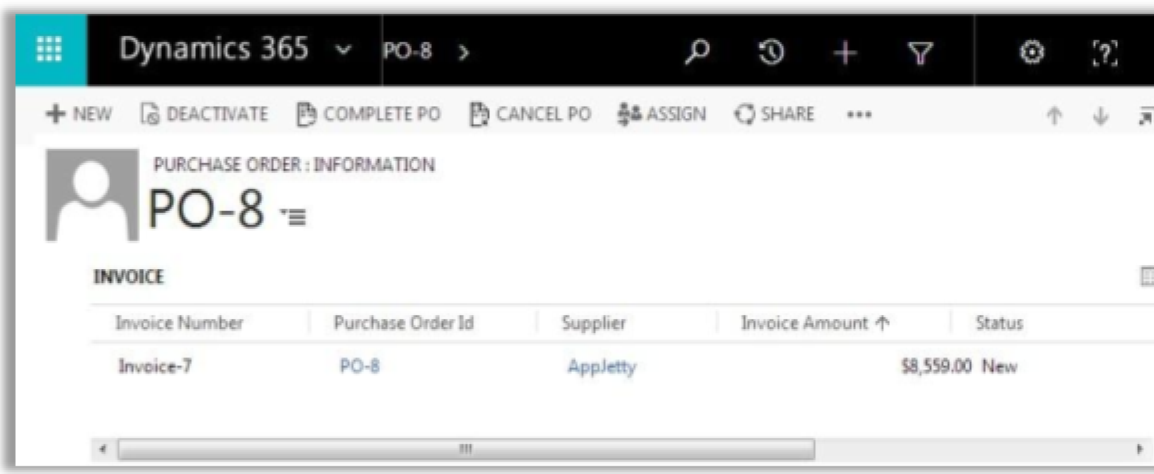
- Now, click on ‘Create Purchase Invoice’ from more options as shown below.



- 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.



- 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
- 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.

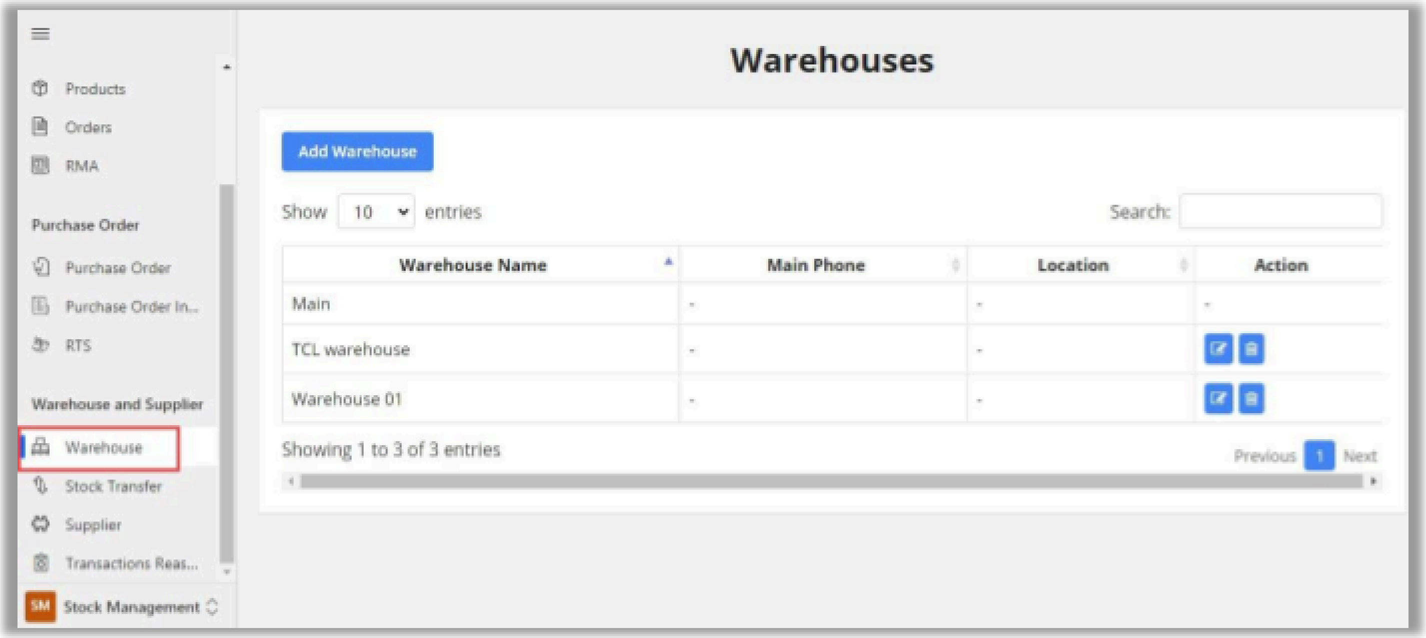


Warehouse and Supplier

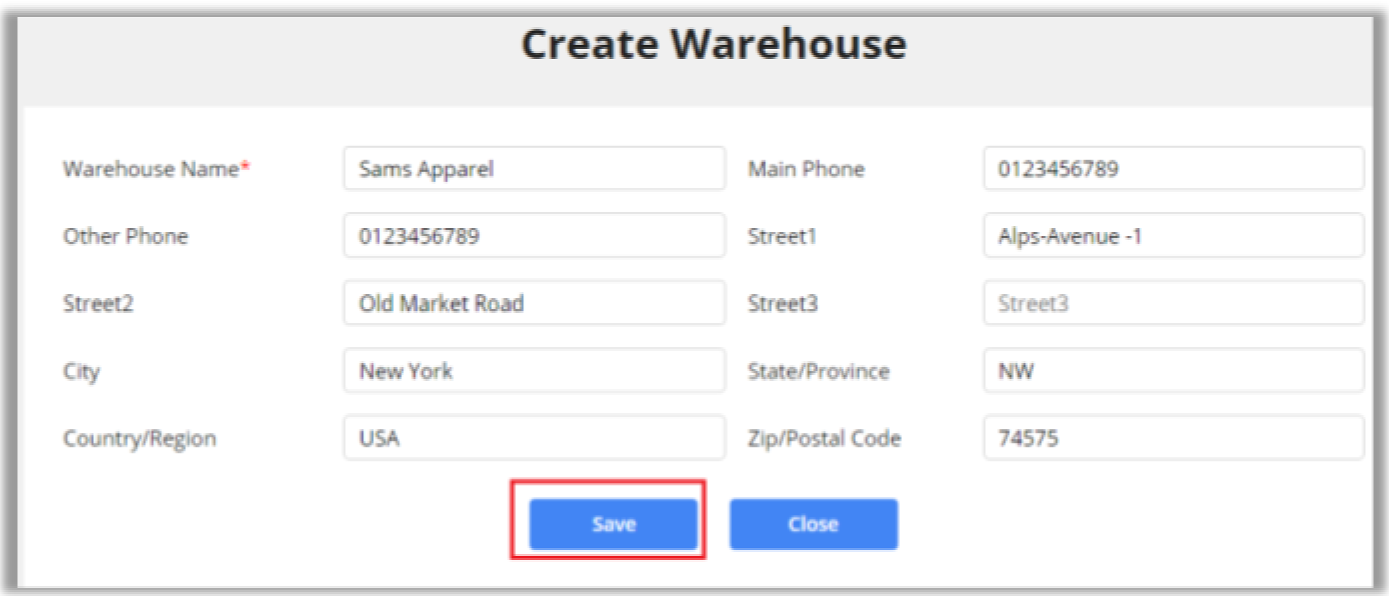
- You can manage the Warehouse, Stock Transfer, Supplier, and Transaction Reason Under the Warehouse and Supplier, you can.

Warehouse

- By clicking on the Warehouse, you will be navigated to the Warehouses form where you can create and manage the Warehouses
- You will get the list of the existing warehouses with the details Warehouse Name, Main Phone, Location, and Action.



- To add a new "Warehouse", click on the Add Warehouse button above the listing. This will open Create Warehouse tab just above the listing.

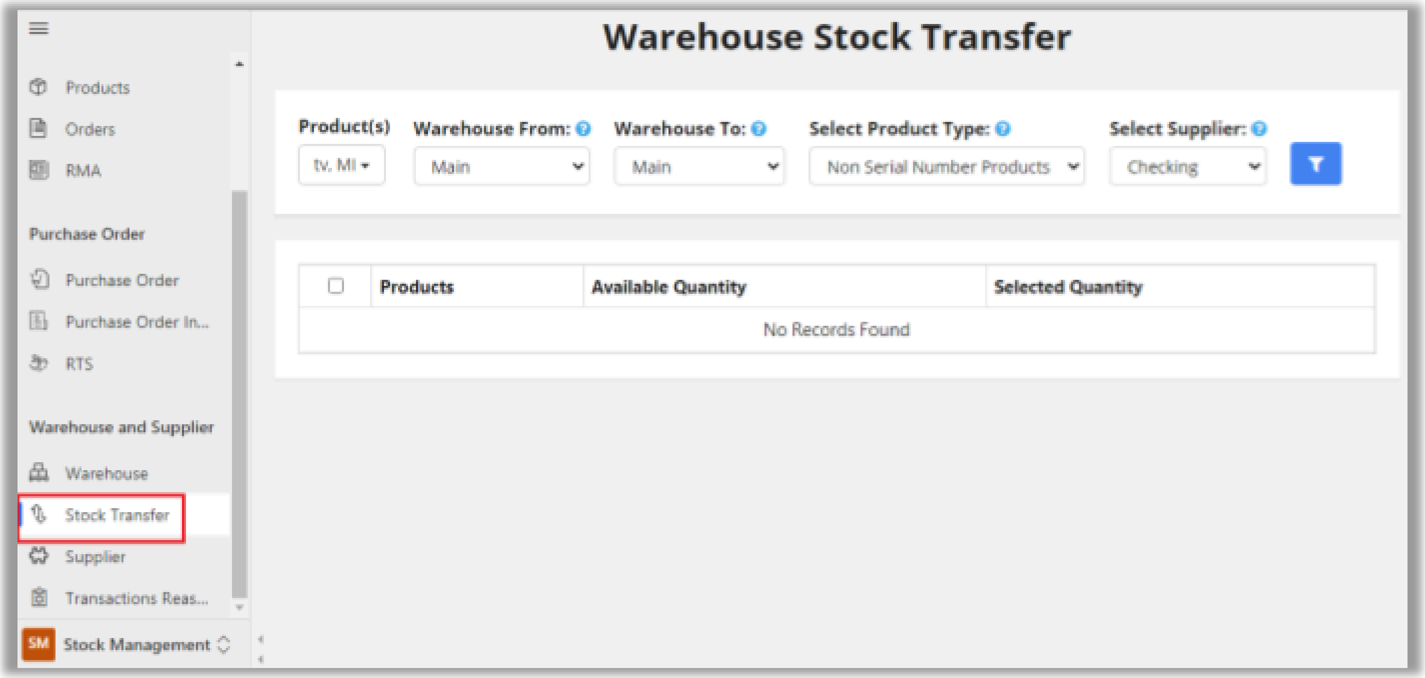


- You need to insert the relevant details for the warehouse and after filling in the details, click on the Save button to create a new warehouse. It will be added to the Warehouses list.

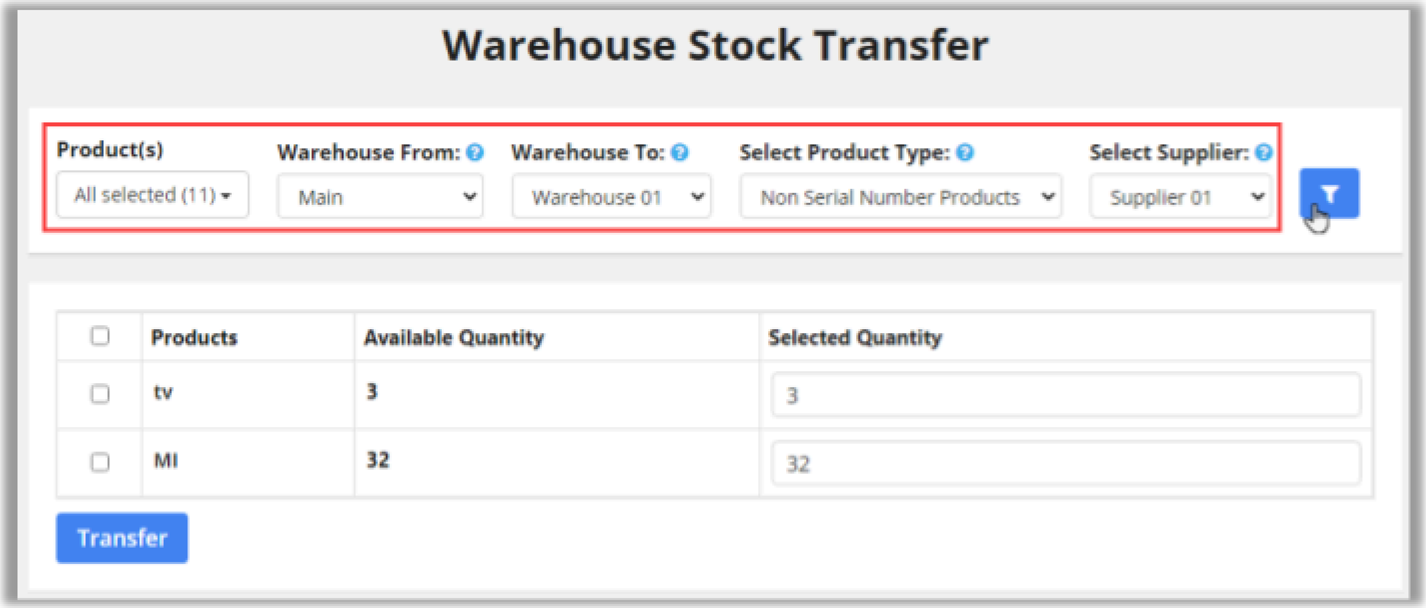
- You can edit any warehouse by clicking on the 'edit' icon from the "Action" column and if you want to remove the warehouse that is not available, you can remove it by clicking on the 'delete' icon.
- Now, when you are managing the products, you will get this newly created warehouse if the product is placed in that warehouse. You can assign the product to the warehouse as per your stock management.

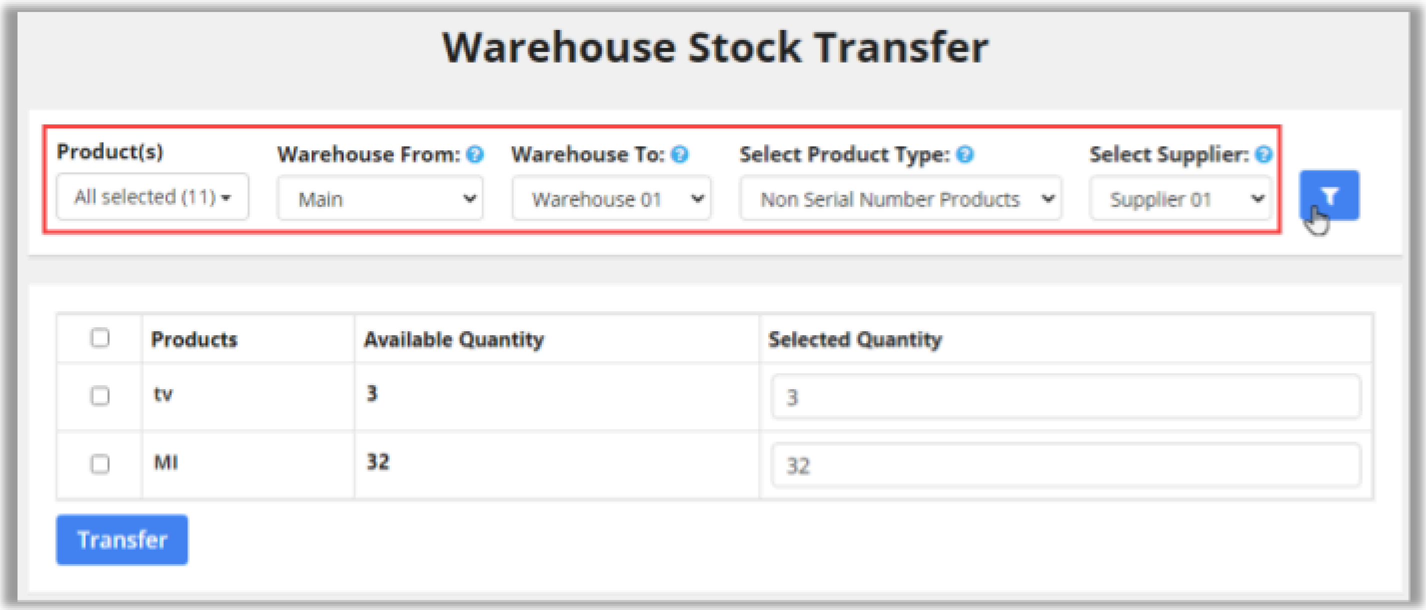
Stock Transfer

- To transfer the stock of one warehouse into another click on the "Stock Transfer" button under the Warehouse and Supplier option from the left navigation.
- By clicking on the "Stock Transfer", you will be navigated to "Warehouse Stock Transfer" page.
- Here, you can select the products from the Product(s) drop-down selection to transfer the products From one Warehouse To another Warehouse.

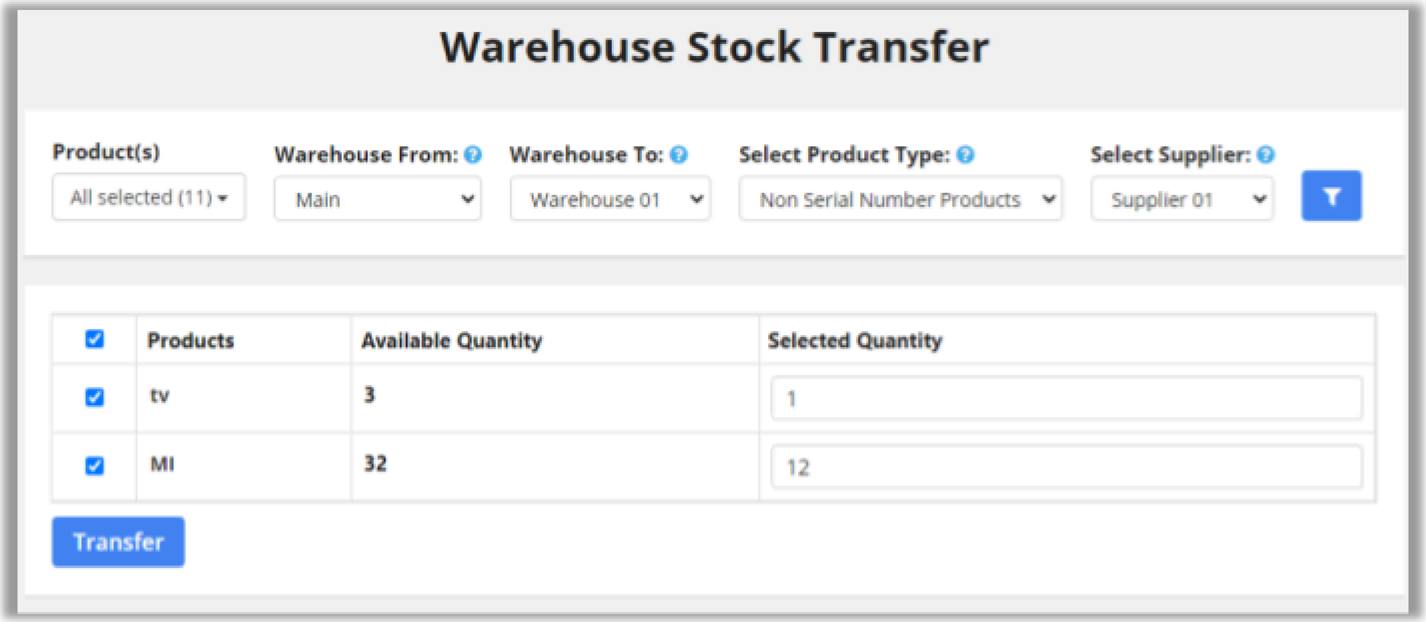


- You can filter the products as per Non-Serial Number Products or Serial Number Products. You can get the products for the specific supplier by selecting the Supplier drop-down selection.
- Once you selected the products, and the specific supplier, and the warehouse from where you want to transfer the stock to another warehouse, click on the 'filter' icon to get the products that you want to transfer.
- You will get the product's details in the tabular form along with the Product's name, Available Quantity, Selected Quantity.

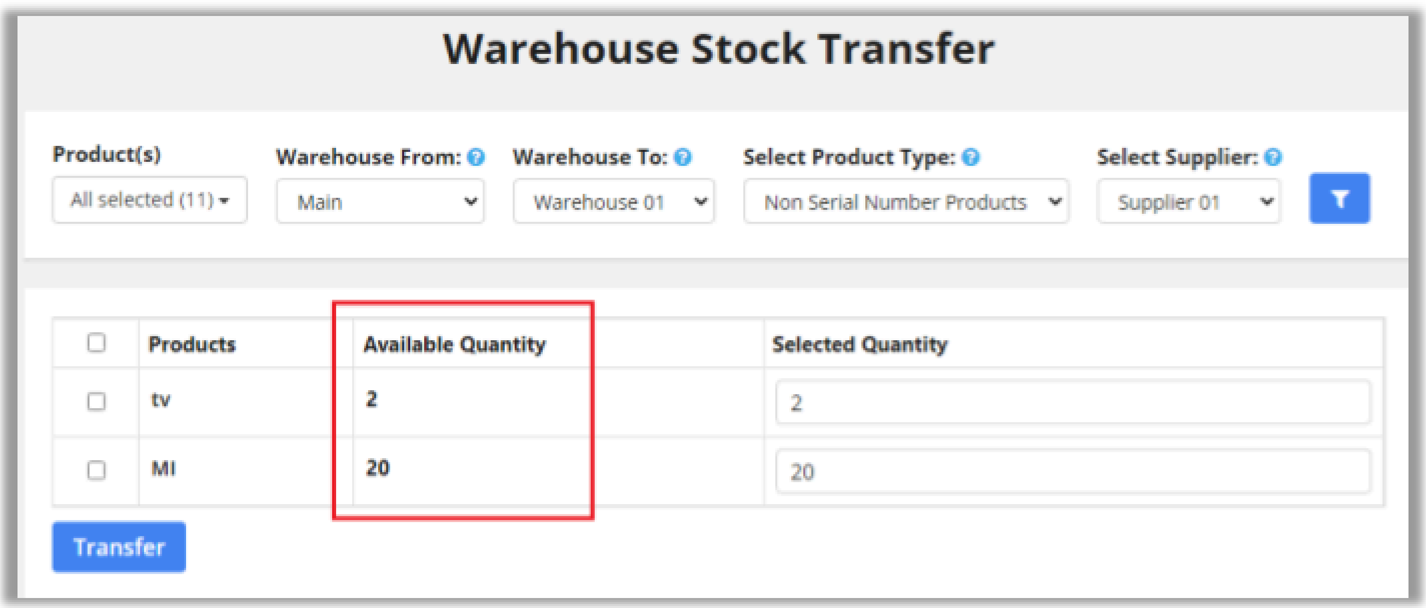




- You need to select the products that you want to transfer and insert the product’s quantity into the “Selected Quantity”.

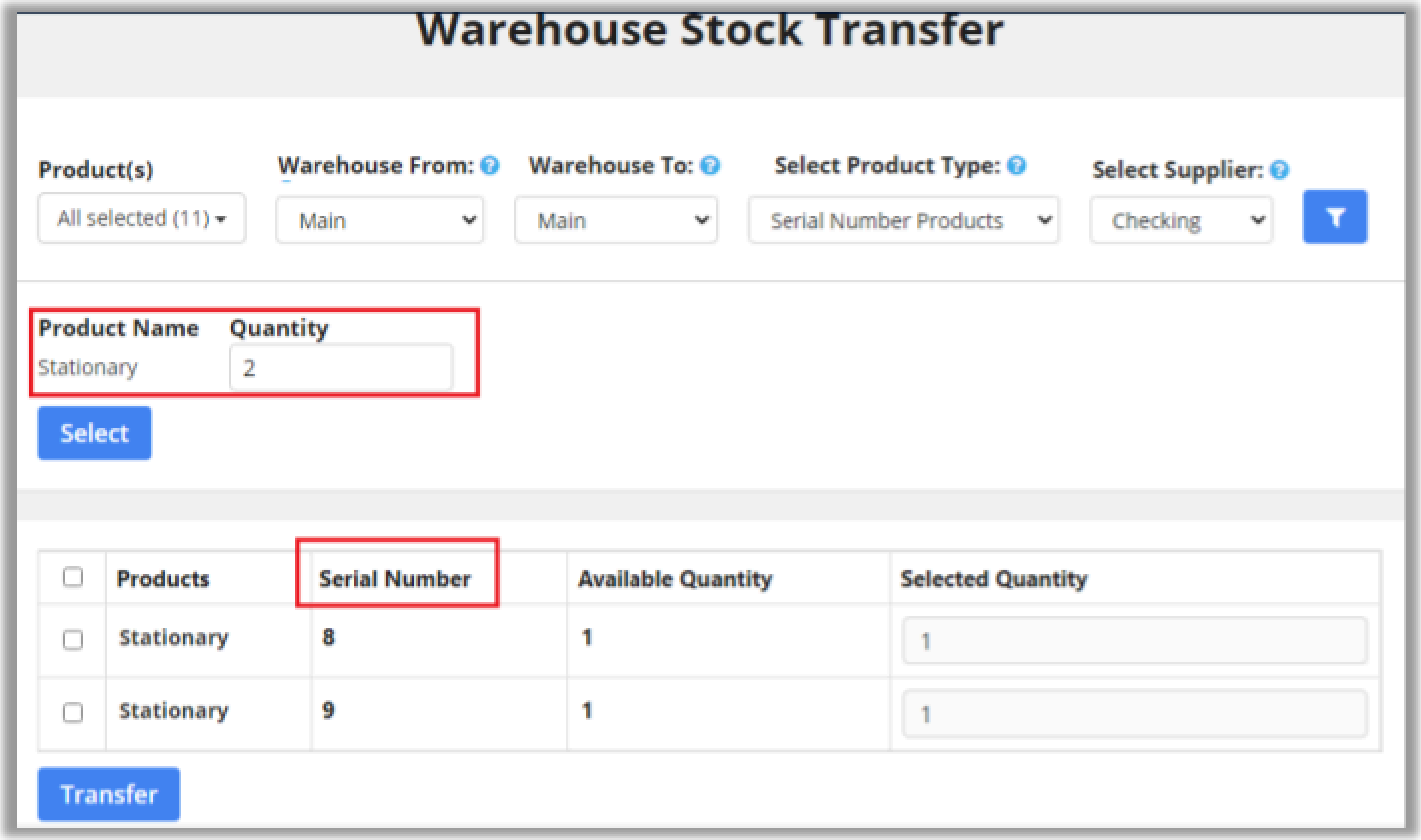


- After selection of the products to be transferred, choose the 'Warehouse From' (Warehouse from which the product is to be transferred) and 'Warehouse To' (Warehouse to which the product is to be transferred) along with supplier selection.
- By clicking on the Transfer button, you will get the success message for the transferred products and the products will be transferred to the respective warehouses. After that, the "Available Quantity" will be updated.



Transfer Serial Number Products

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



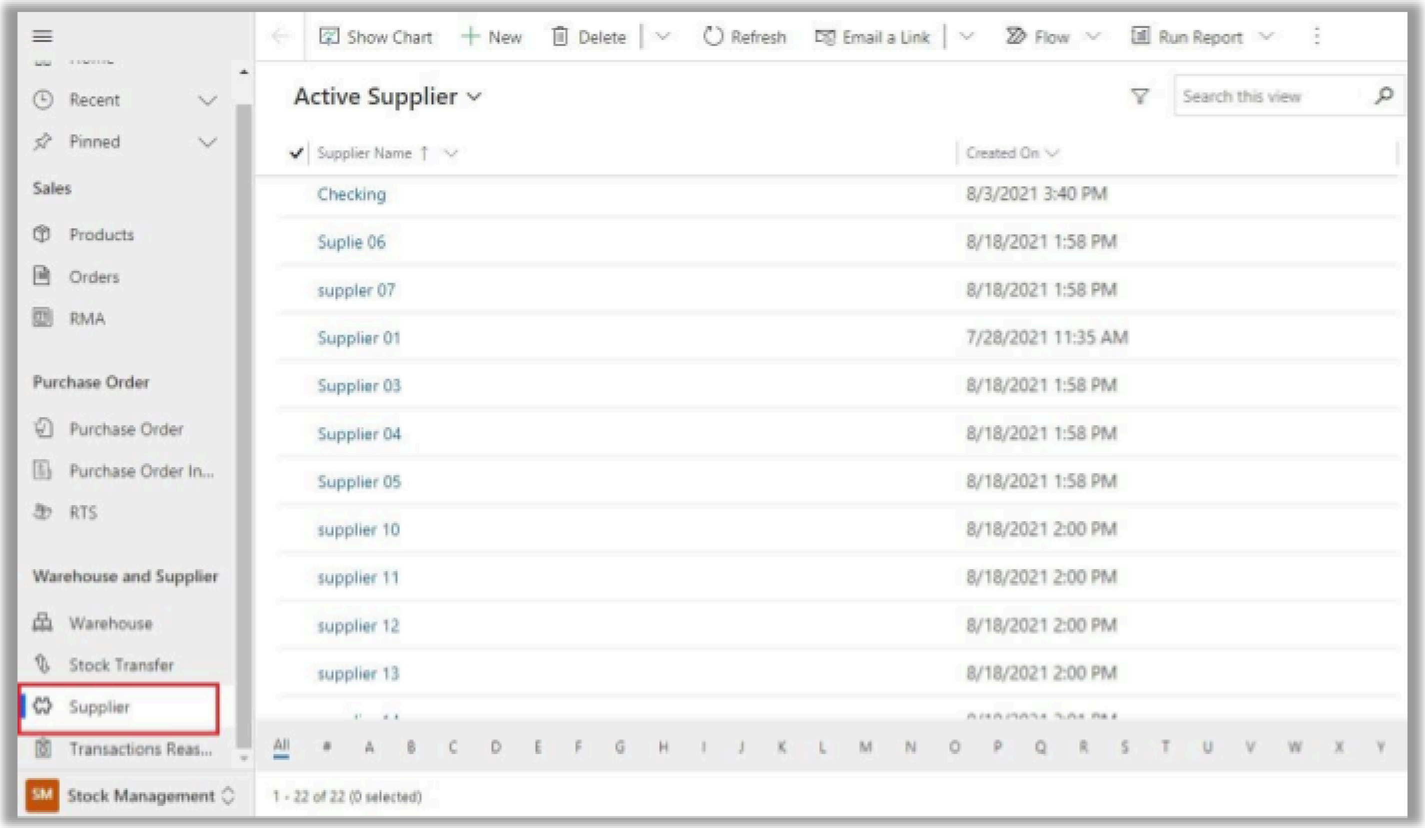
- For products with serial numbers, you can also enter a quantity and click on the select button to select that many products.
- After selection of the products to be transferred, choose the ‘Warehouse From’ (Warehouse from which the product is to be transferred) and ‘Warehouse To’ (Warehouse to which the product is to be transferred) along with supplier selection.

- Click on the ‘Transfer’ button. By clicking on it, your selected serial number of products will be transferred to the respective warehouses.

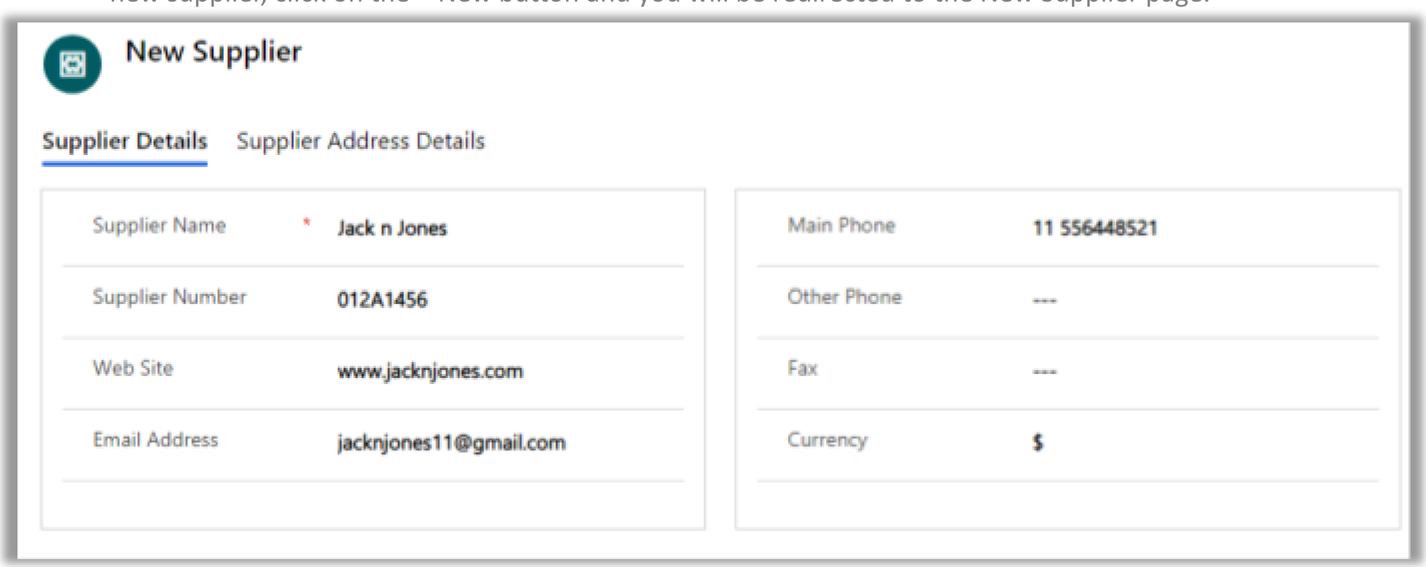
Note: A list of products will be shown on basis of the combination of warehouse and supplier selection.

Suppliers

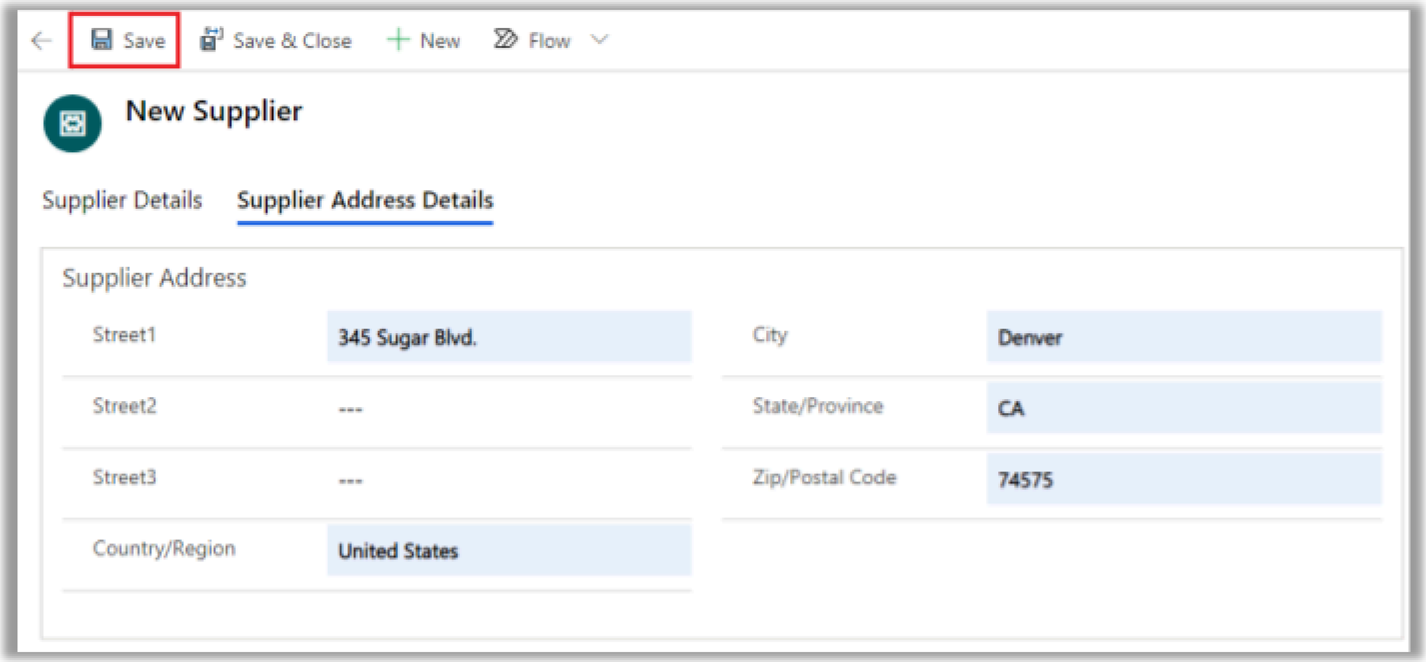
- You can add and manage the suppliers by clicking on the Supplier option under the Warehouse and Suppliers from the left navigation panel.



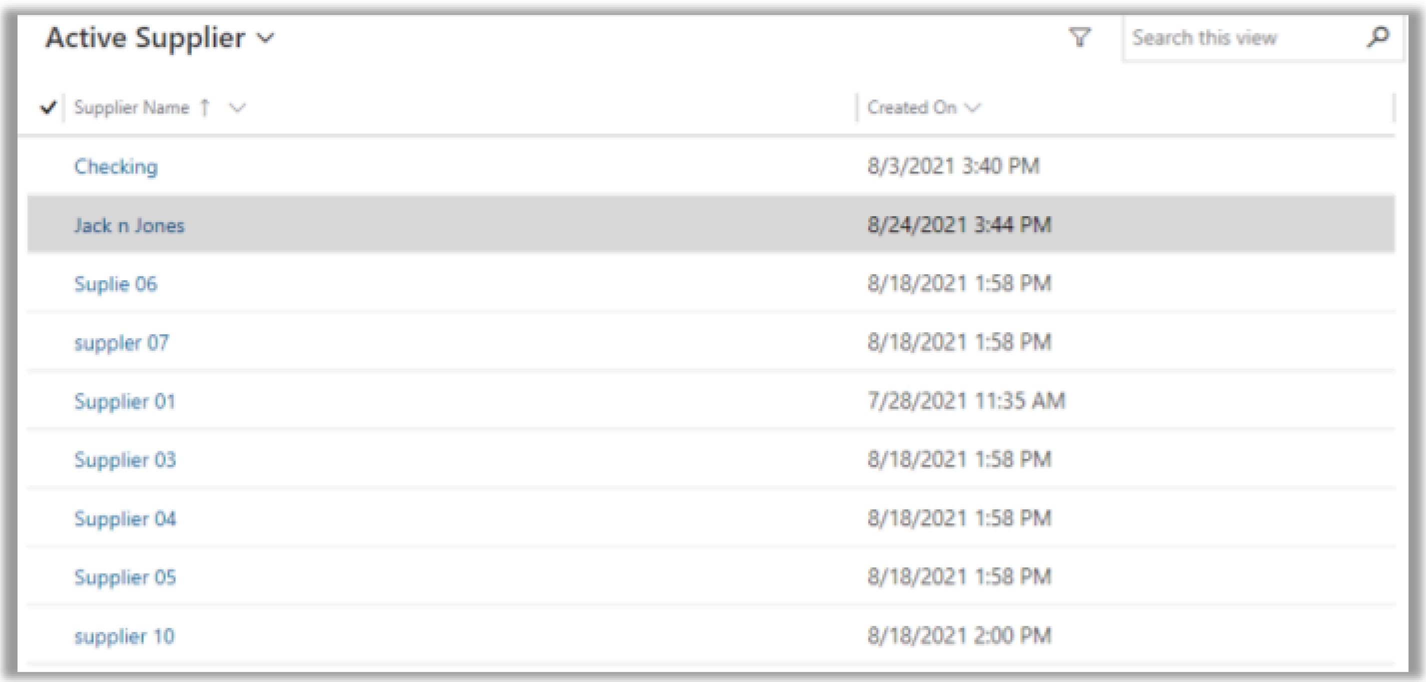
- By clicking on the "Supplier", you will be navigated to the listing of supplier's page. To create a new supplier, click on the + New button and you will be redirected to the New Supplier page.



- You need to insert the Supplier Details and the Address Details. After clicking on the Save button, the supplier will be added to the list.



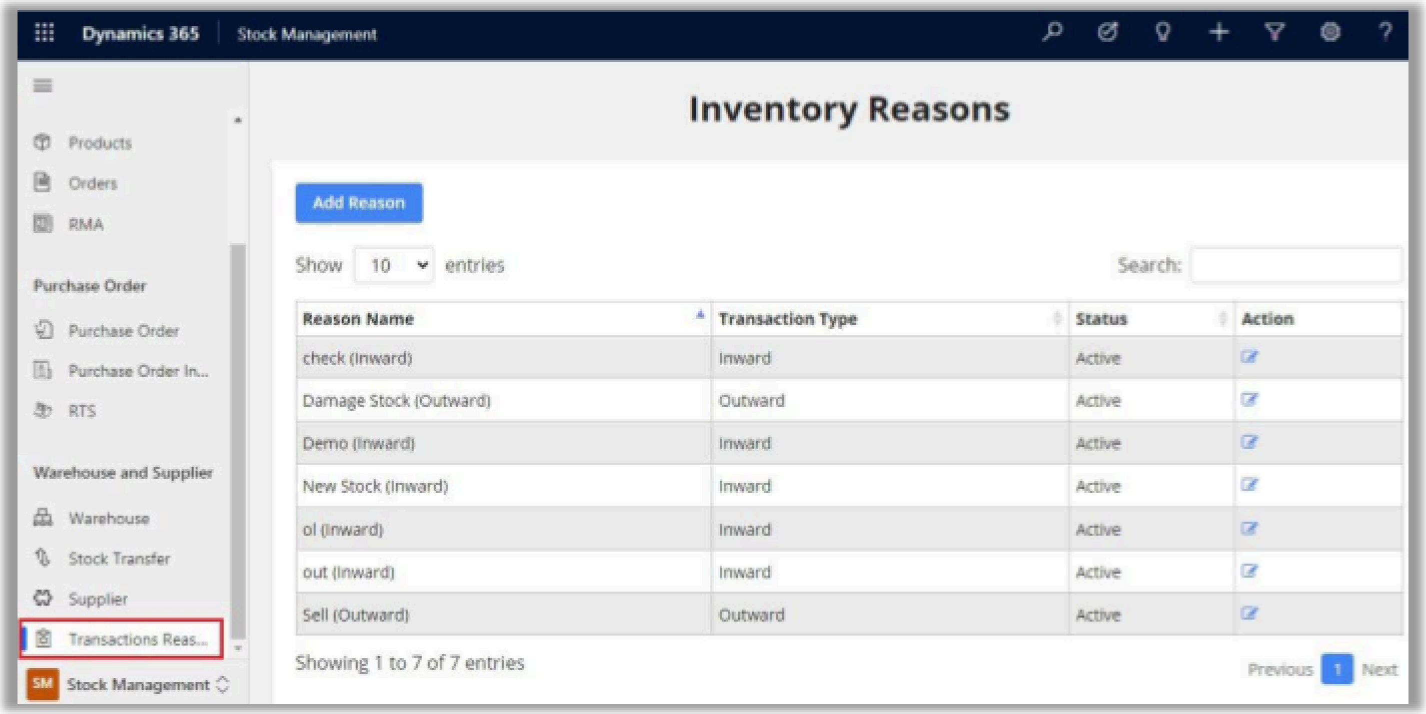
- Here, the new supplier is added.



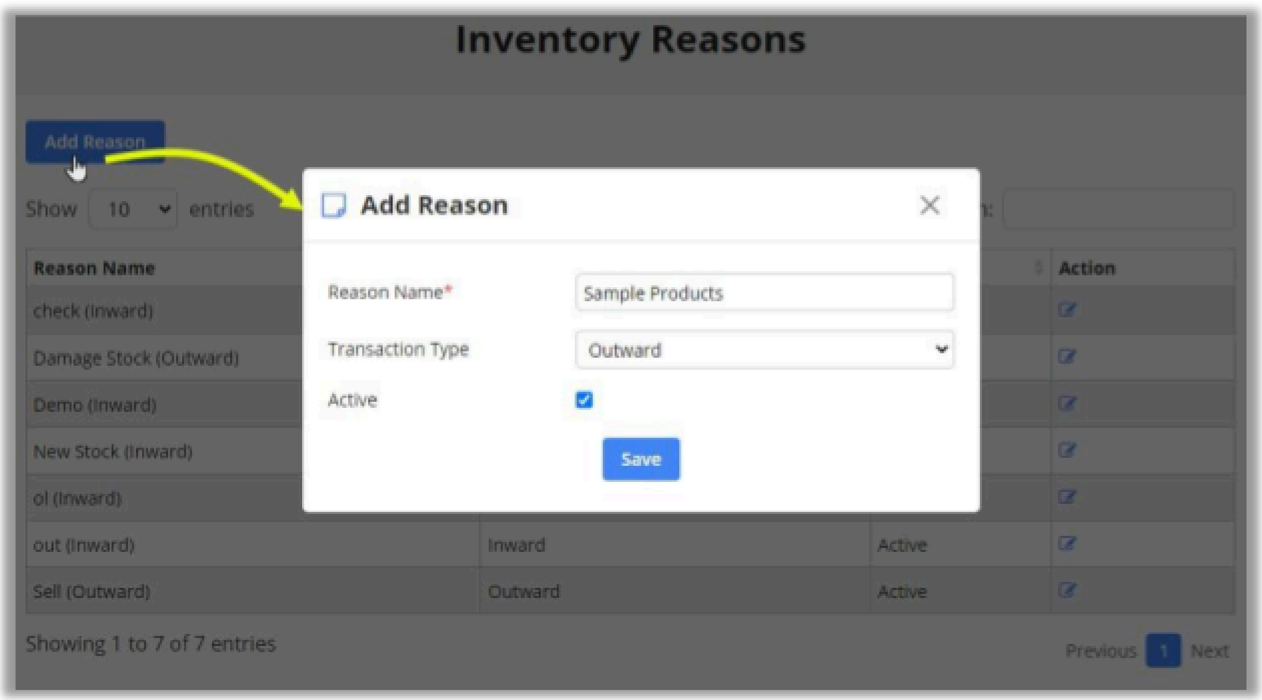
- Now, you can assign the belonging products to the suppliers when you are managing the Product's stocks. You will get the newly added in the "Supplier" drop-down selection.

Transaction Reasons

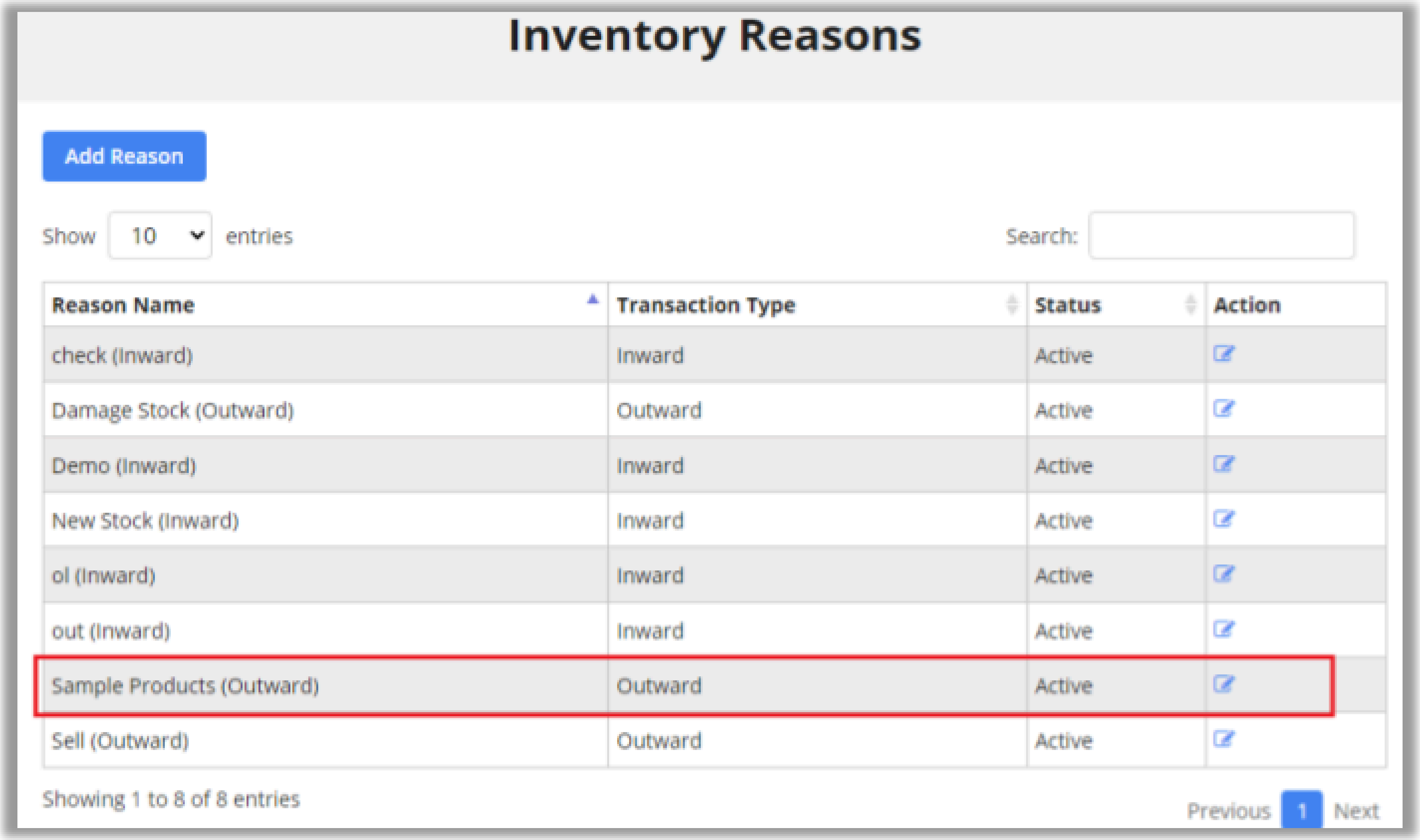
- To manage the "Inventory Reasons" for transactions in your inventory, click on the 'Transaction Reasons'. By clicking on 'Transaction Reasons', you will be navigated to the "Inventory Reasons" page containing a list of inventory reasons along with its details.



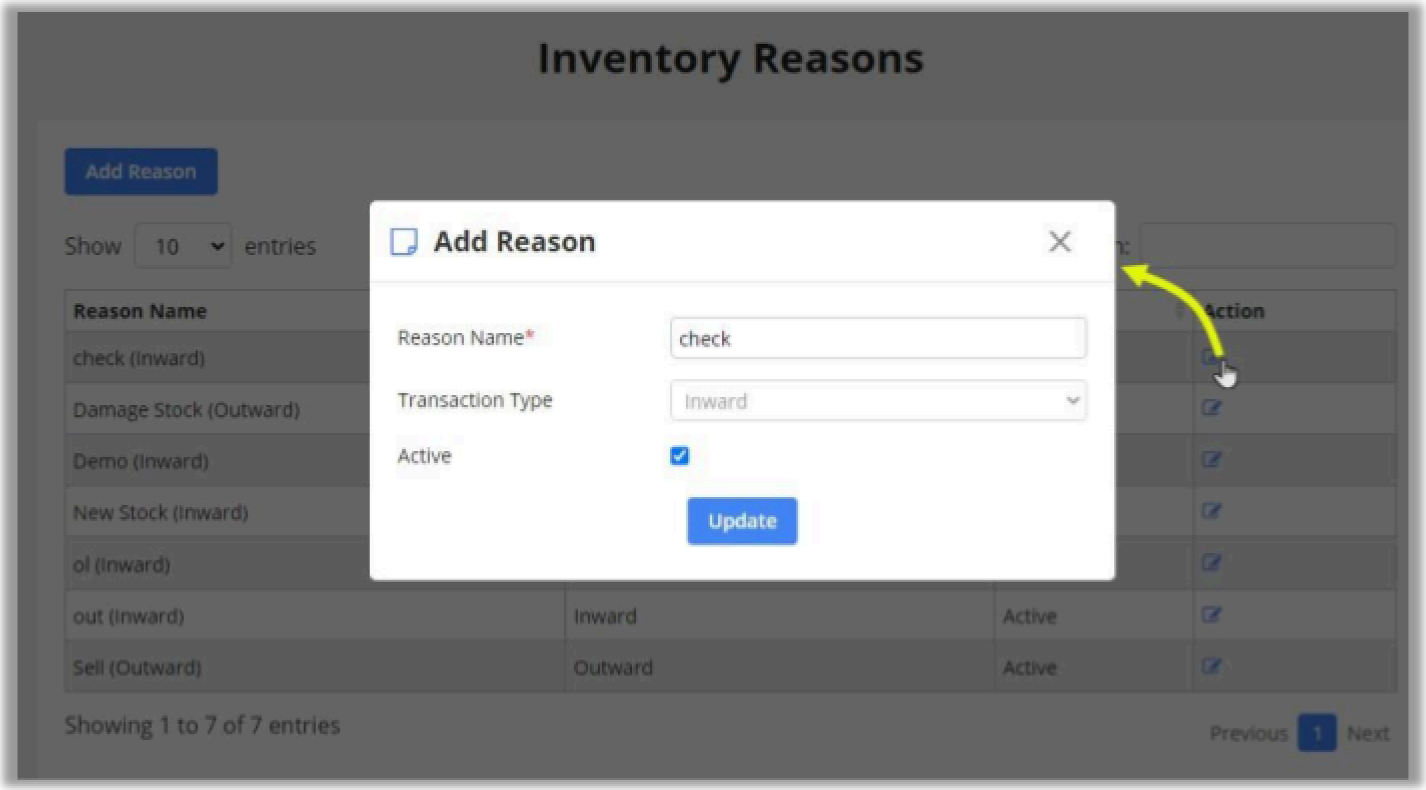
- Now, to add a new "Inventory Reason", click on the Add Reason button. You will get the "Add Reason" popup.



- You need to insert the name of reason in the 'Reason Name' text field and need to select the 'Transaction Type' dropdown either "Inward" or "Outward". The 'Active' checkbox must be ticked to activate the reason.
- By clicking on the Save button, the reason will be added to the list of Inventory Reasons.



- You can also edit inventory reasons by clicking on the 'Edit' icon beside the particular inventory reason under the '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 the user itself.

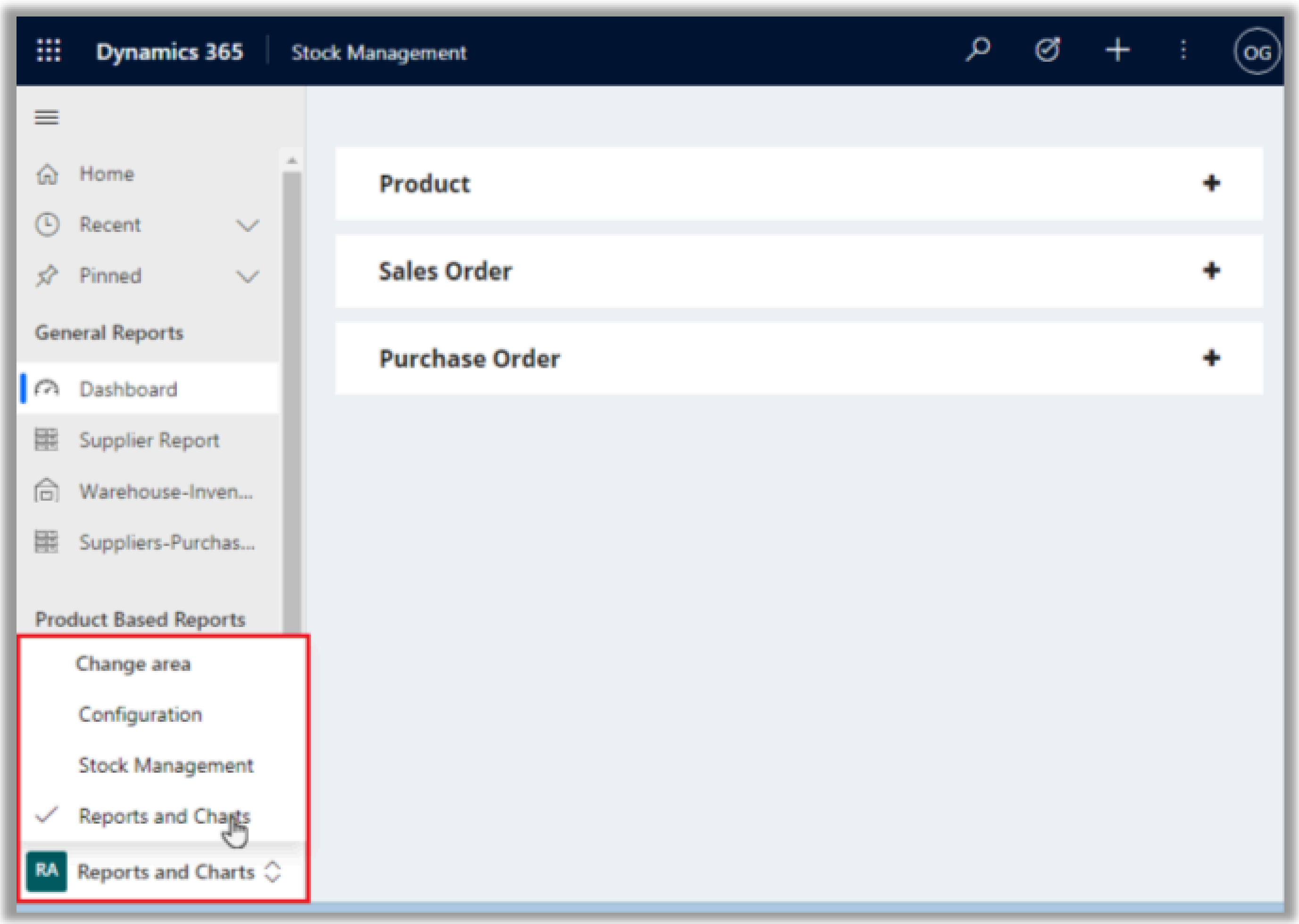
Reports and Charts

- The Reports and Charts are divided into three sections: General Reports, Product Based Reports, and Charts.

General Reports

Dashboard

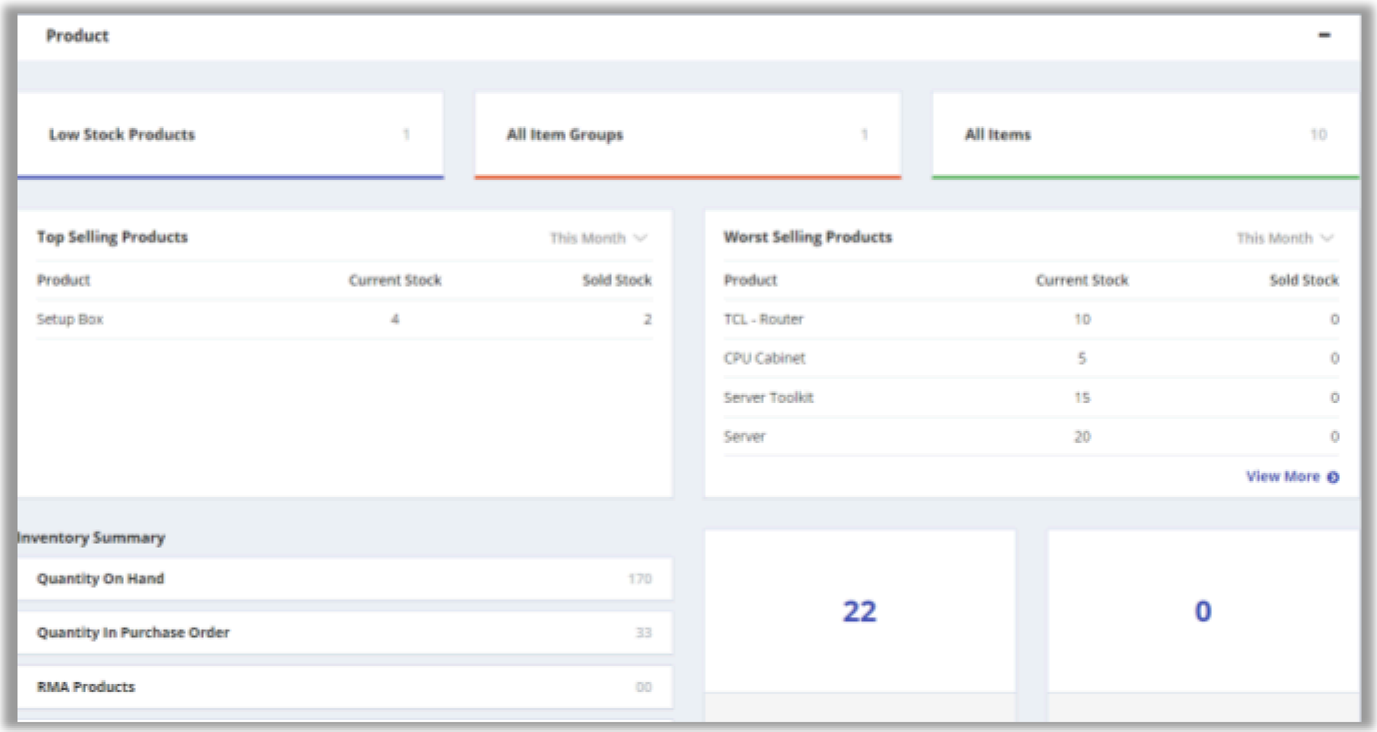
- To access the Dashboard, click on the **Reports and Charts** from the bottom-left corner navigation panel.



- The "Dashboard" has been divided into three sections based on data shown in the dashlets:
  > Product > Sales Order > Purchase Order

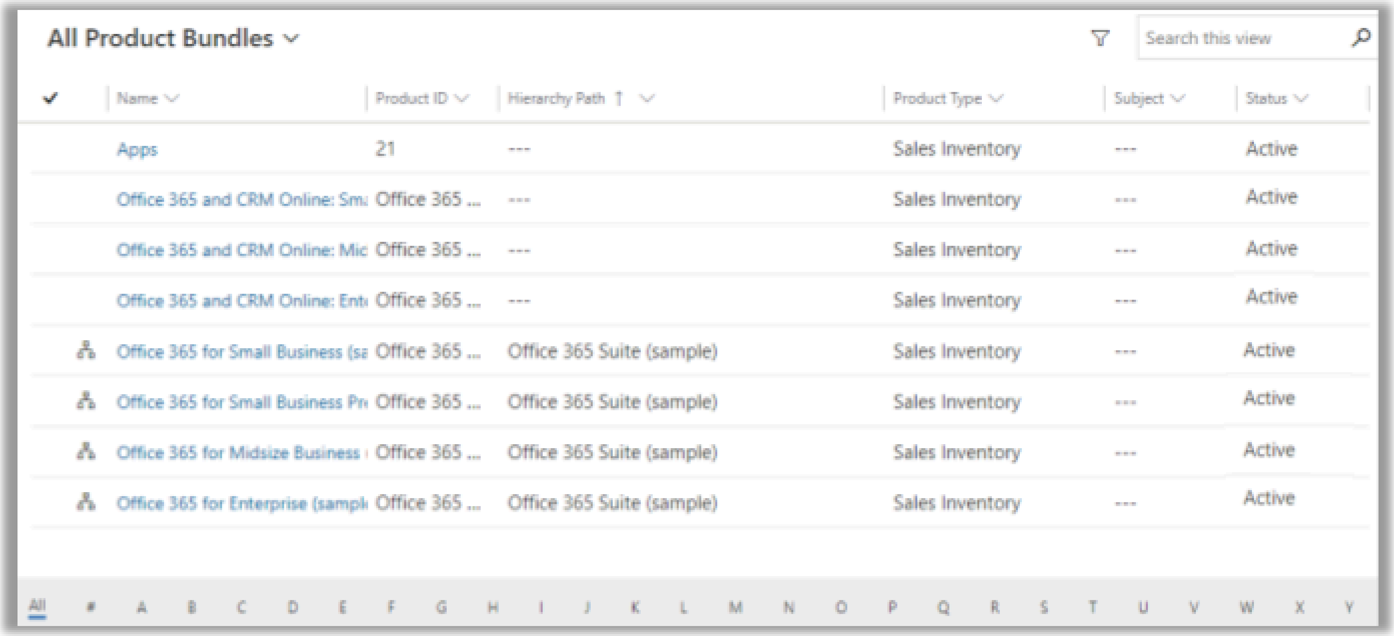
Product

- The product dashboard displays summarized counts and listing related to products. By clicking on the specific counts, you will be navigated to the details page.



- **Low stock products:** Get a count of low stock products. By clicking on the counter get redirected to list of low stock products.

- **All Item Groups:** This dashlet shows the count of product bundles present in the inventory. On click of the count, redirects to product bundles listing.



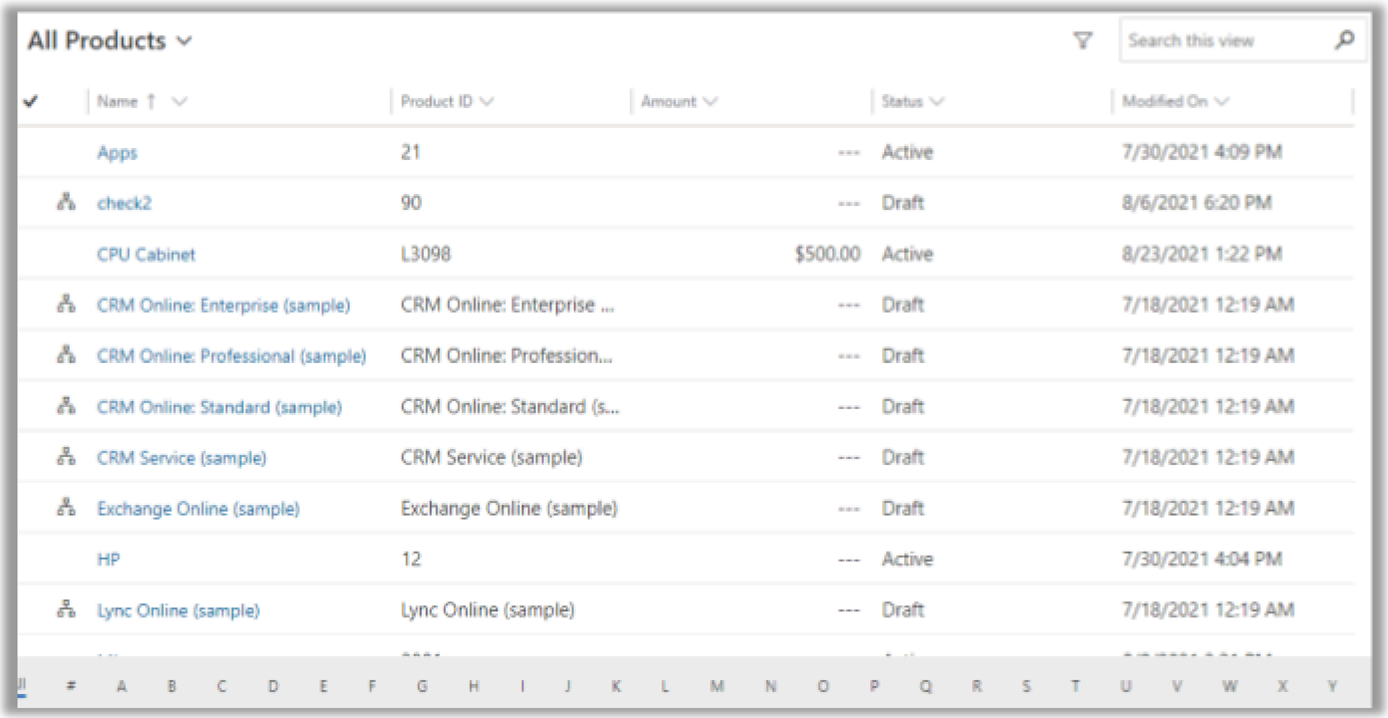
All Product Bundles

Search this view

Name	Product ID	Hierarchy Path	Product Type	Subject	Status
Apps	21	---	Sales Inventory	---	Active
Office 365 and CRM Online: Sm	Office 365 ...	---	Sales Inventory	---	Active
Office 365 and CRM Online: Mic	Office 365 ...	---	Sales Inventory	---	Active
Office 365 and CRM Online: Ent	Office 365 ...	---	Sales Inventory	---	Active
Office 365 for Small Business (sa	Office 365 ...	Office 365 Suite (sample)	Sales Inventory	---	Active
Office 365 for Small Business Pr	Office 365 ...	Office 365 Suite (sample)	Sales Inventory	---	Active
Office 365 for Midsize Business	Office 365 ...	Office 365 Suite (sample)	Sales Inventory	---	Active
Office 365 for Enterprise (sampl	Office 365 ...	Office 365 Suite (sample)	Sales Inventory	---	Active

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y

- **All Items:** This dashlet shows the count of all products in the inventory. On click of the count, redirects to product listing page.



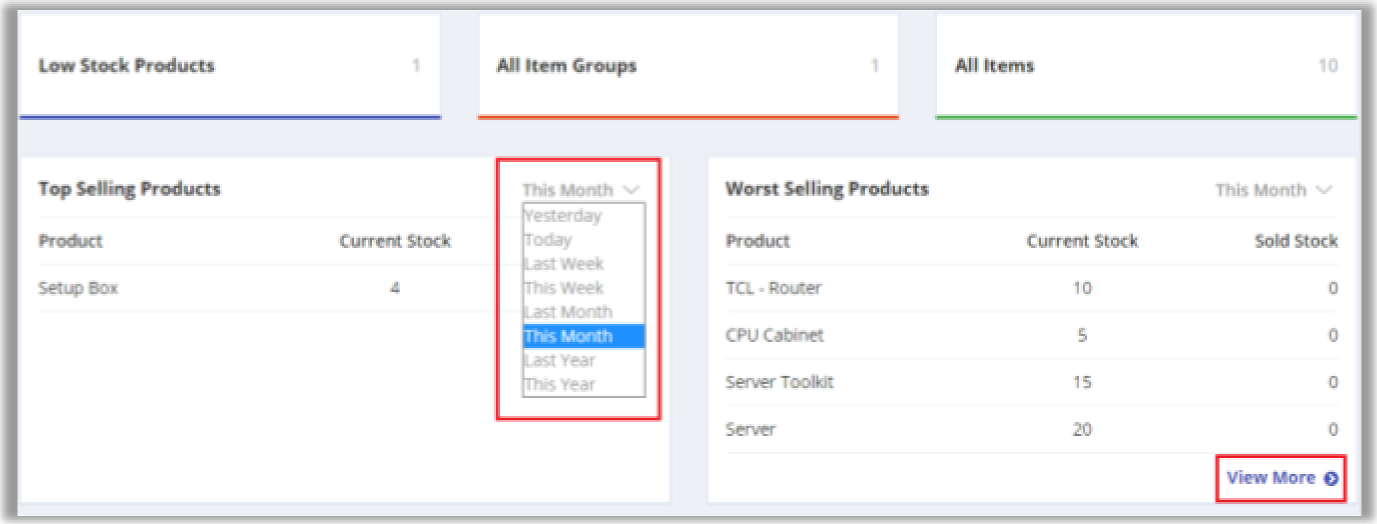
All Products

Search this view

Name	Product ID	Amount	Status	Modified On
Apps	21	---	Active	7/30/2021 4:09 PM
check2	90	---	Draft	8/6/2021 6:20 PM
CPU Cabinet	L3098	$500.00	Active	8/23/2021 1:22 PM
CRM Online: Enterprise (sample)	CRM Online: Enterprise ...	---	Draft	7/18/2021 12:19 AM
CRM Online: Professional (sample)	CRM Online: Profession...	---	Draft	7/18/2021 12:19 AM
CRM Online: Standard (sample)	CRM Online: Standard (s...	---	Draft	7/18/2021 12:19 AM
CRM Service (sample)	CRM Service (sample)	---	Draft	7/18/2021 12:19 AM
Exchange Online (sample)	Exchange Online (sample)	---	Draft	7/18/2021 12:19 AM
HP	12	---	Active	7/30/2021 4:04 PM
Lync Online (sample)	Lync Online (sample)	---	Draft	7/18/2021 12:19 AM

A B C D E F G H I J K L M N O P Q R S T U V W X Y

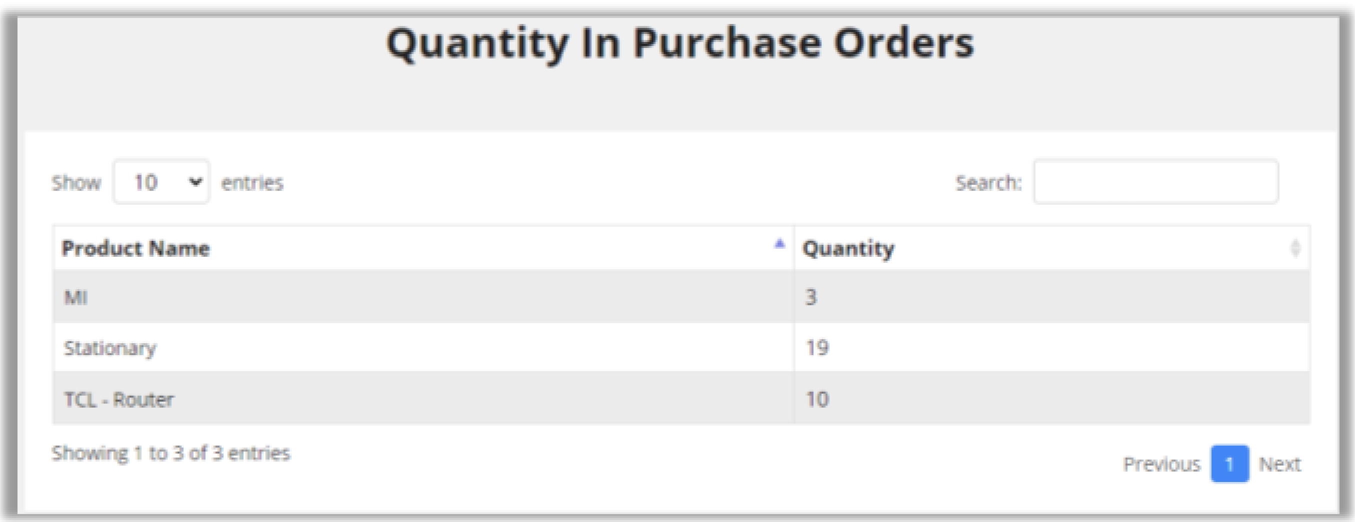
- On the dashboard, you can also get to know Top Selling Products and Worst Selling Products from the inventory based on product sales.
    - You can filter the Top and Worst product list on basis of periods like This Week, Last Week, etc.



- If there are more records for the Top/Worst Selling Products, you will get the View more > option to expand the list. By clicking on the "View More" option, you will be redirected to the specific product list page in a new tab.

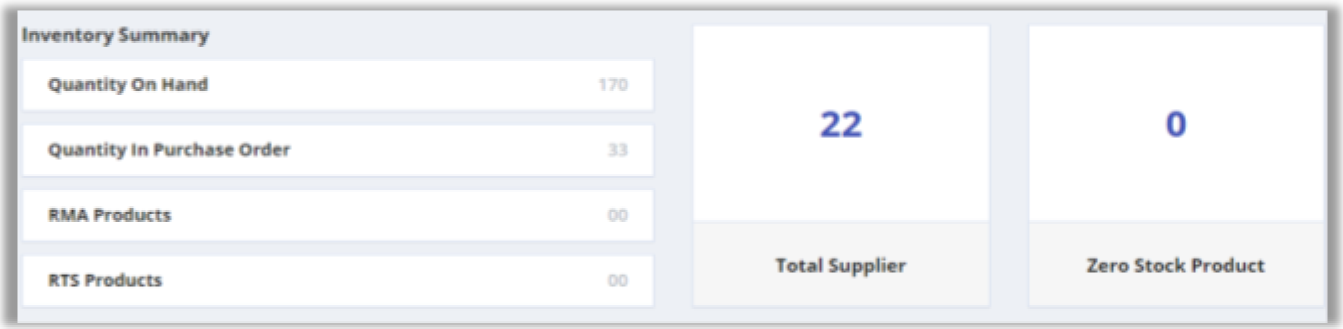
- Inventory Summary: You will get the count for the following summary:
  > Quantity on Hand > Quantity in Purchase Order > RMA Products > RTS products

- By clicking on the count of the summary, you will be redirected to the specific page. "Quantity In Purchase Order" is the count of products that are in order and are yet to be received.



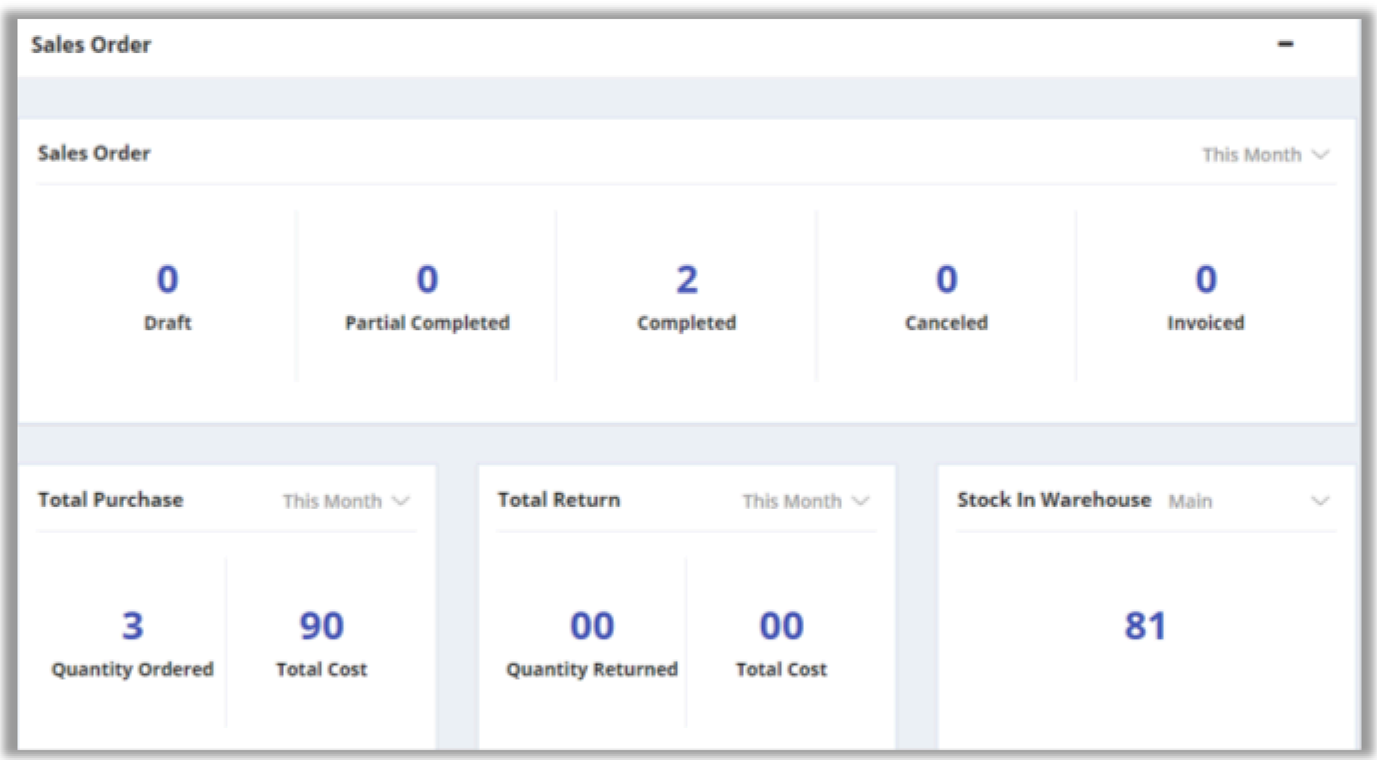
- **Total Suppliers:** Get count and list of suppliers. By clicking on the count, a new tab will appear including the listing of the supplier's name, Main Phone, and Email.

- **Zero Stock Product:** Get a count of zero stock products and by clicking on it, you will be redirected to the data table listing all zero stock products.



Sales Order

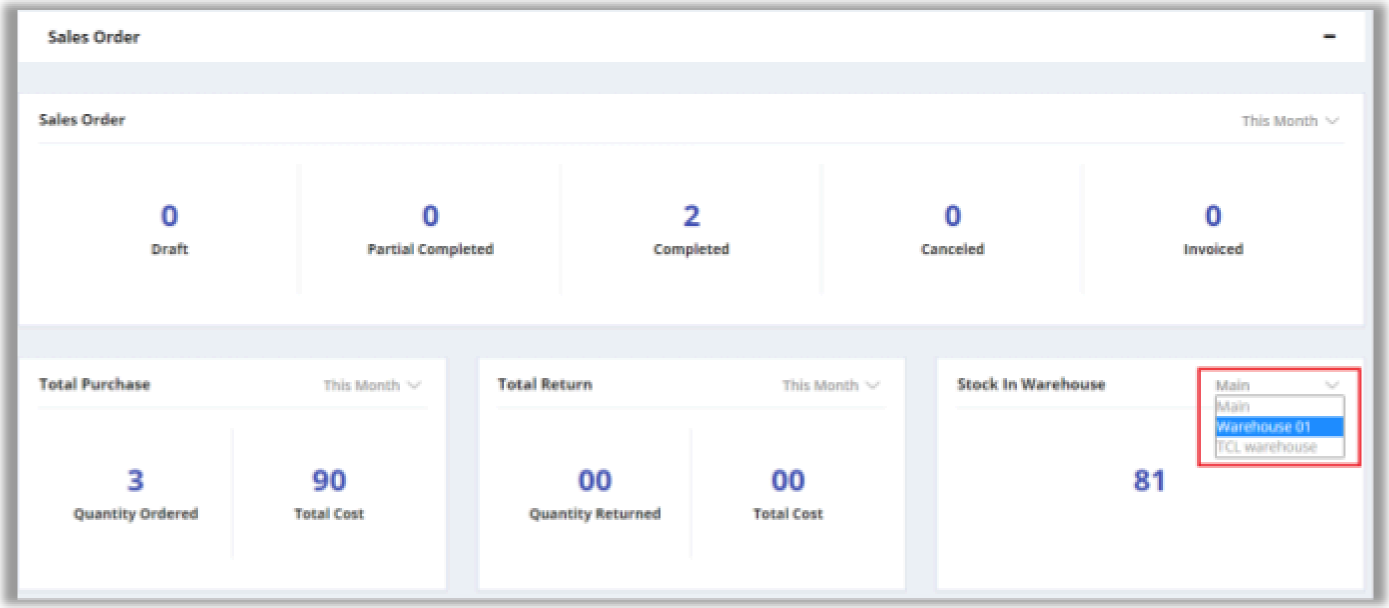
- Sales Order dashboard provides a summarized count related to sales order stages. This count can be viewed based on the period selected.



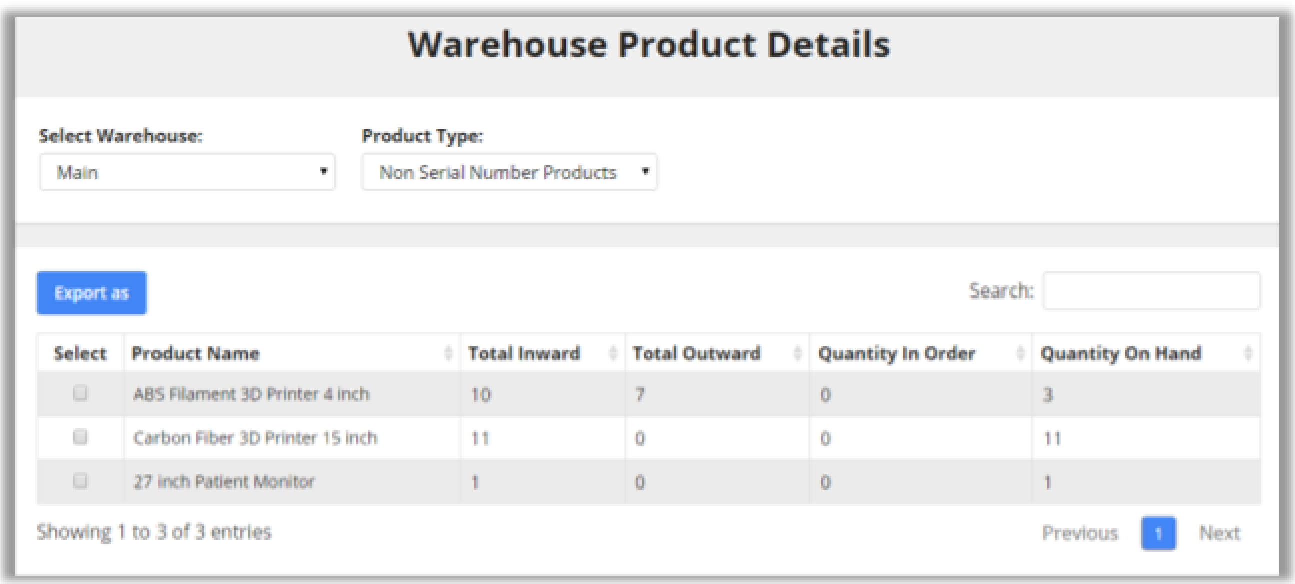
- **Total Purchase:** Get a count of the total number of products that were purchased along with the amount. This list can be filtered on basis of periods like this week, previous week, this month, previous month, this year, and previous year.

- **Total Return:** Get a count of the total number of products that were returned along with the amount. This list can be filtered on basis of periods like this week, previous week, this month, previous month, this year, and previous year.

- **Stock in Warehouse:** Get count of present stock in the warehouse based on warehouse selected from the dropdown.

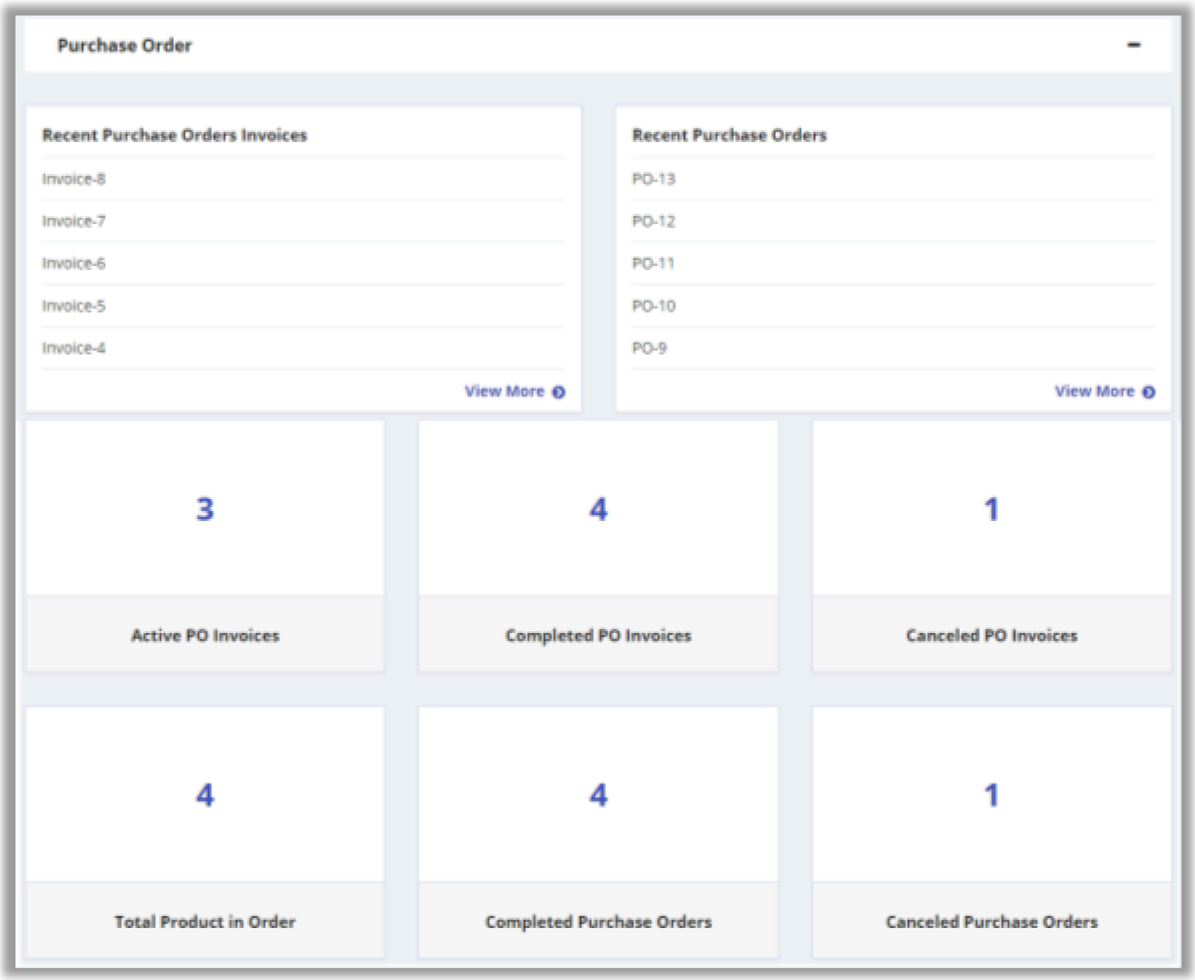


- You will get the drop-down option there from where you can select the specific "Warehouse" to get the count of the stock. By clicking on the count, you will be redirected to the Warehouse Product Details.



Purchase Order

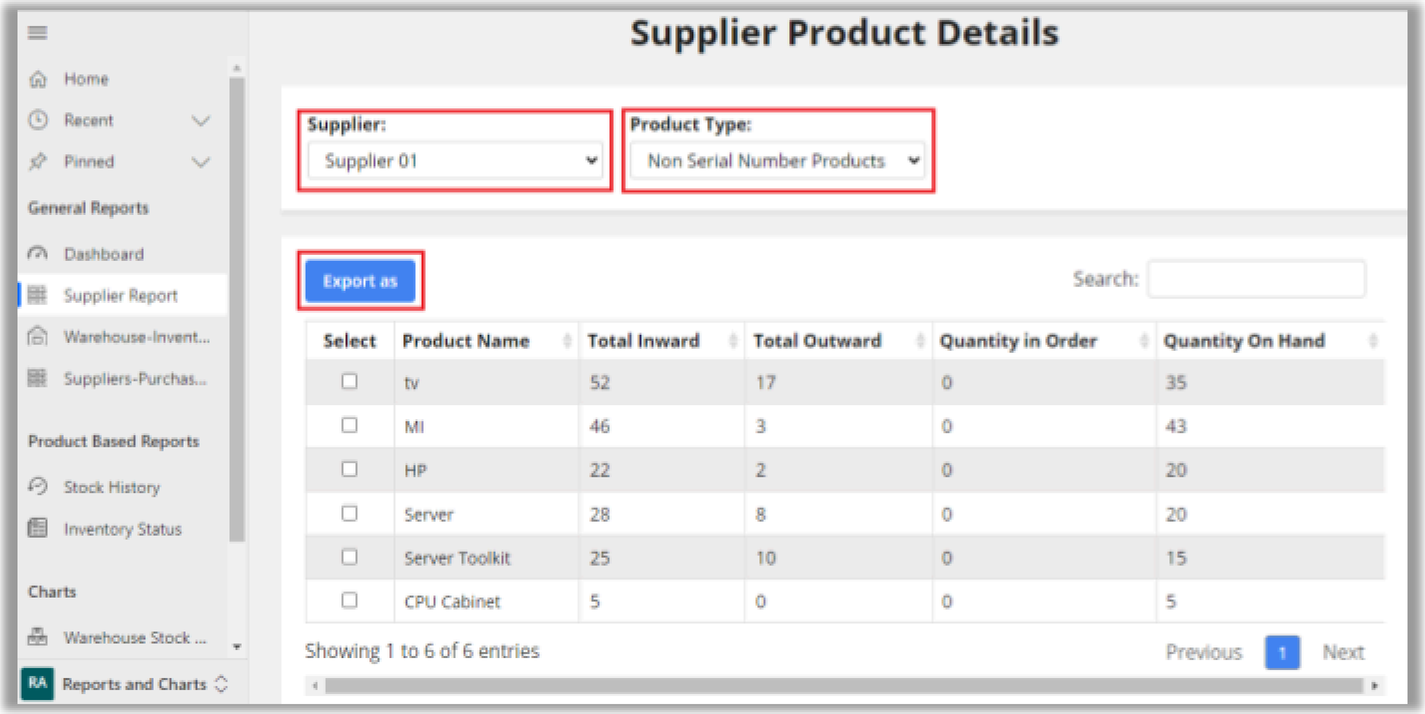
- The purchase Order dashboard provides a summarized count related to purchasing orders and invoices.



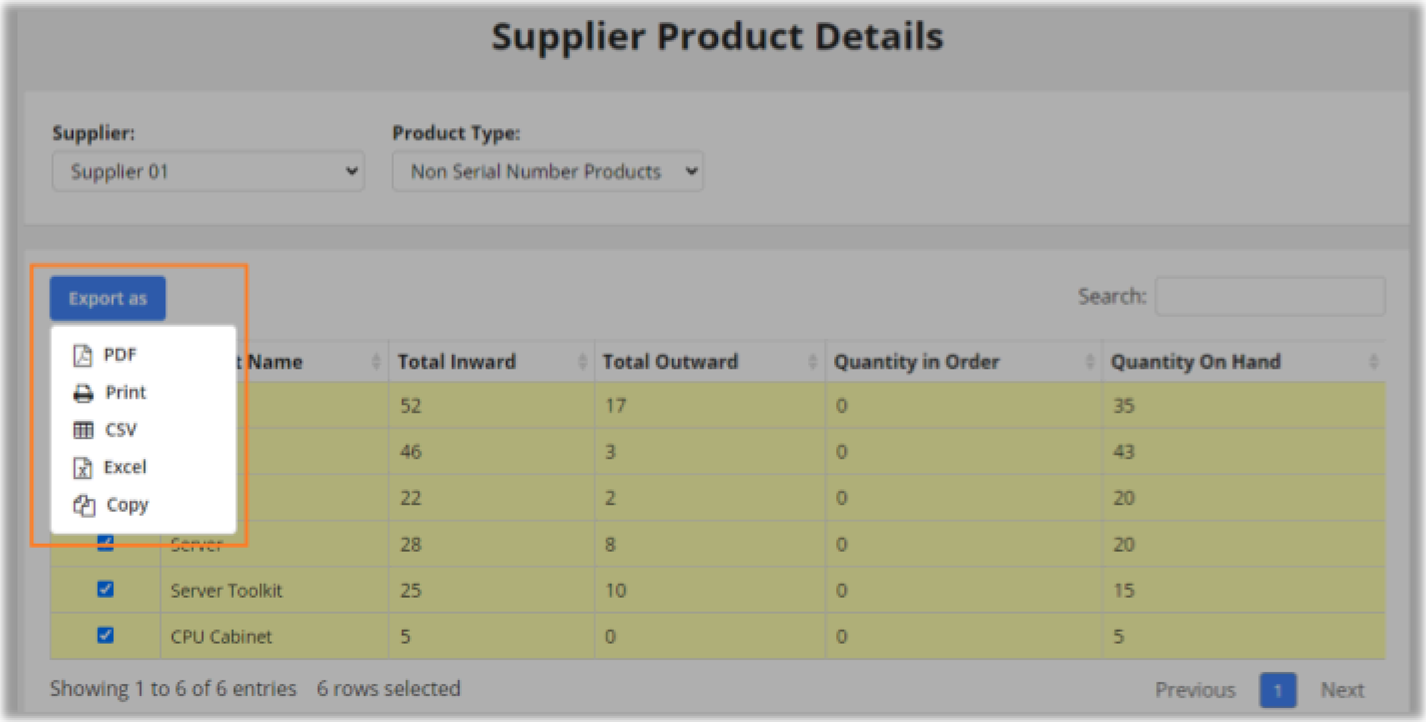
- By clicking on the count of Recent Purchase Orders Invoices and Recent Purchase Orders, you will get the listing.
- You will get a count for **Active PO Invoices**, **Completed PO Invoices**, and **Canceled PO Invoices**.
- **Total Product in Order:** This dashlet provides the count of products for which a purchase order has been created.
- You will get the count for **Completed Purchase Orders** and **Canceled Purchase Orders**.

Supplier Report

- You can check the product list based on the Supplier and Product Type by clicking on the "Supplier Report". You will get the product details in a tabular form along with Total Inward number, Total Outward number, Quantity In Order, and Quantity On Hand based on the Supplier and its Product Type.

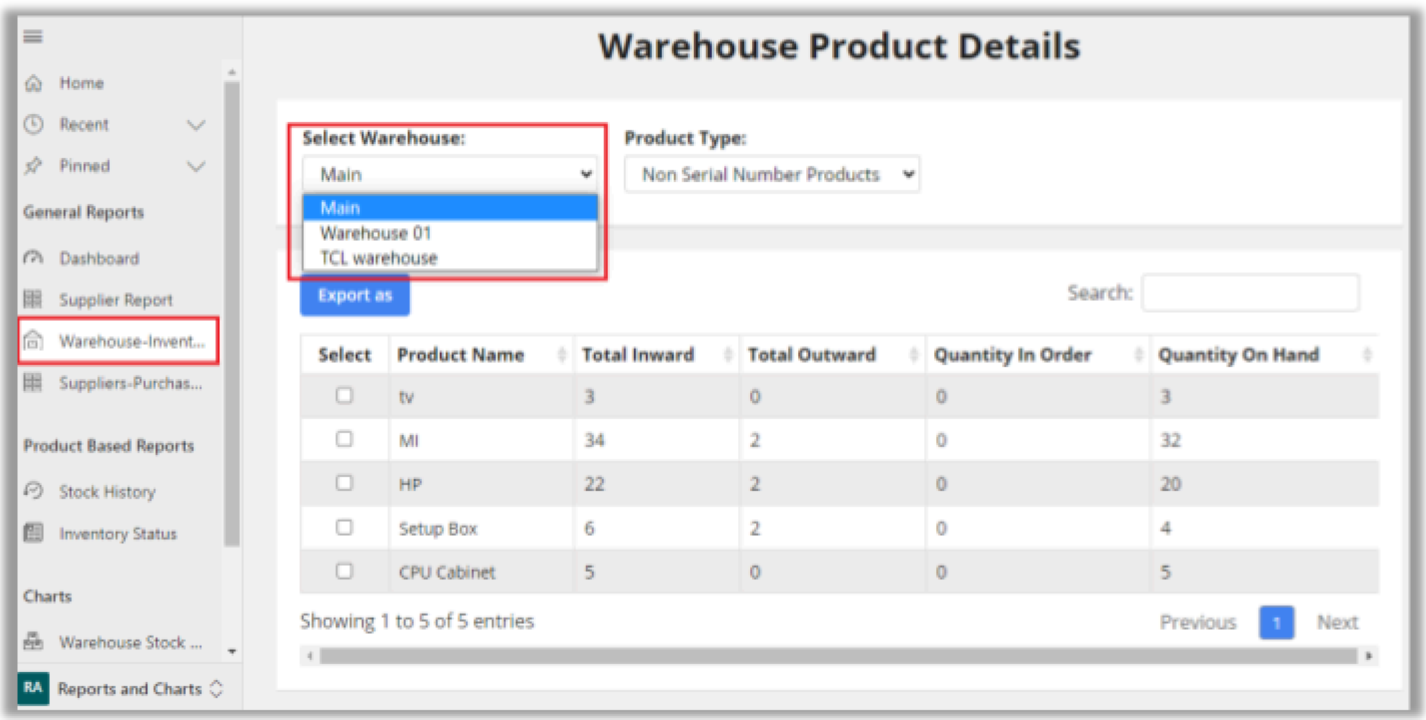


- Supplier: You will get the dropdown selection of the Supplier. Select the supplier to check their list of the product.
- Product Type: You can list the products based on Non-Serial Number Products and Serial Number Products.
- Export As: You can export the list of the products in PDF, CSV, and Excel format. You need to select the products from the list. You can also direct Print and Copy the selected products from the list.

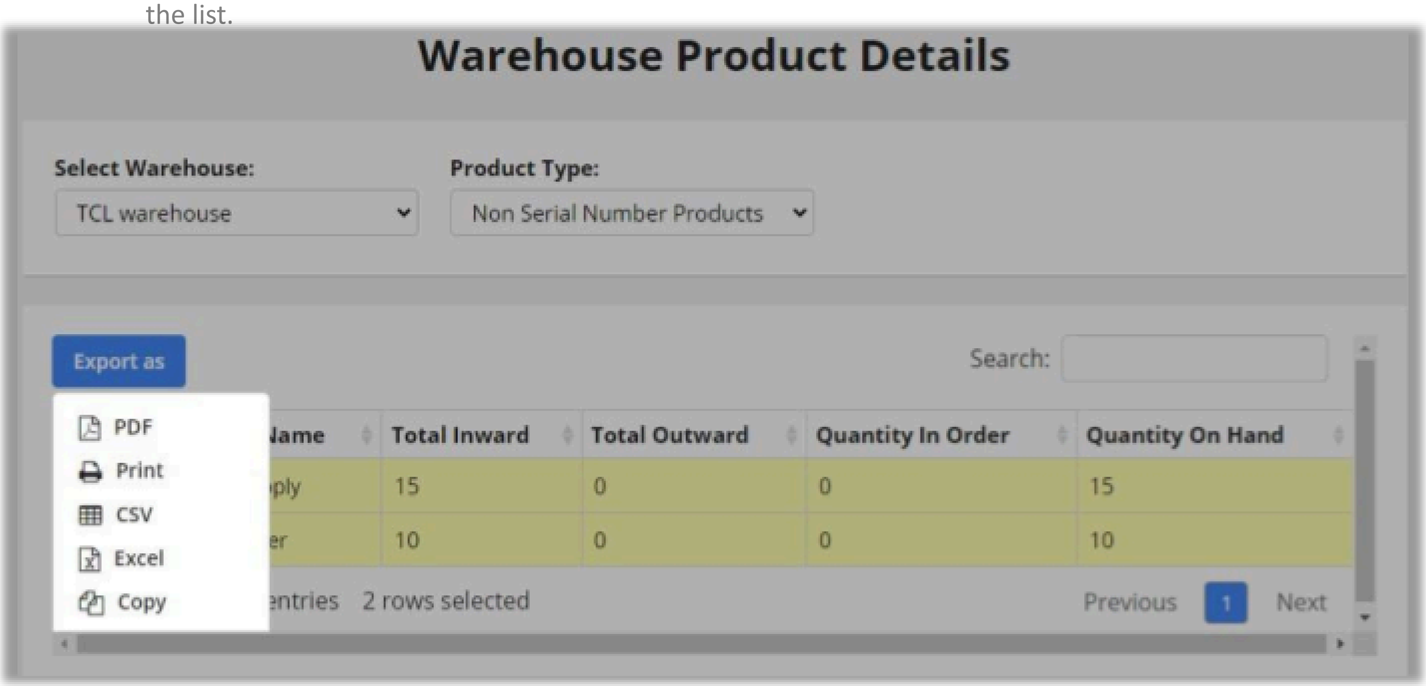


Warehouse-Inventory Reports

- You can check the Warehouse-Inventory wise reports by clicking on the "Warehouse-Inventory Reports" (Warehouse Product Details).
- You will get the product details in a tabular form along with Total Inward number, Total Outward number, Quantity In Order, and Quantity On Hand based on the Warehouse and its Product Type.



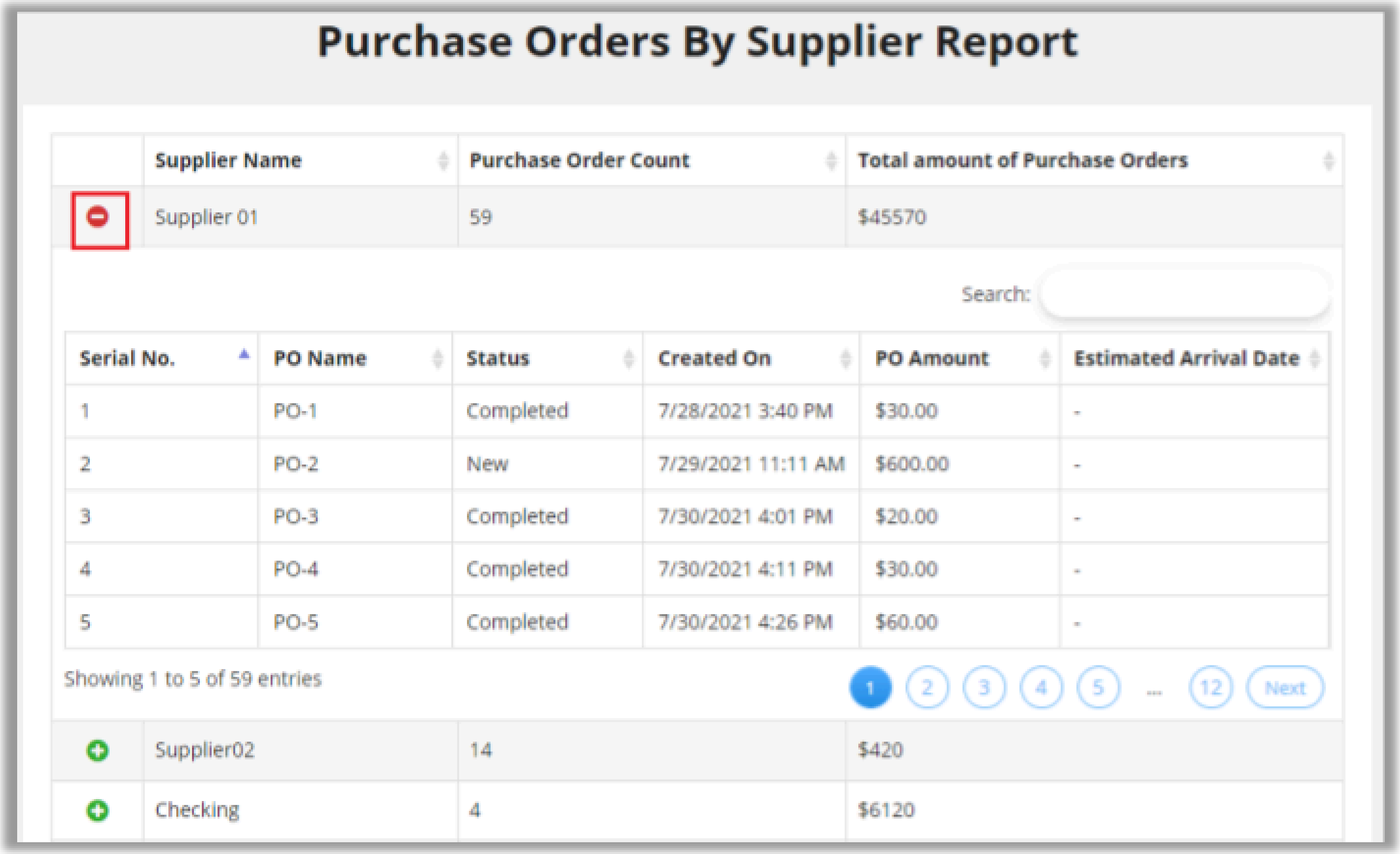
- Select Warehouse: You will get the dropdown selection of the Warehouses. Select the warehouse to check the list of the product.
- Product Type: You can list the products based on Non-Serial Number Products and Serial Number Products.
- Export As: You can export the list of the products in PDF, CSV, and Excel format. You need to select the products from the list. You can also direct Print and Copy the selected products from the list.



Supplier-Purchase Order Reports

- You can check the Purchase Orders by the individual Suppliers by clicking on the "Suppliers-Purchase Order Report". You will get the report of the purchase orders in the tabular form along with Supplier Name, Purchase Order Count, and Total amount of Purchase Orders.

- You will get the 'expansion' + icon before the Supplier Name. By clicking on the + icon, you will get the list of the generated product orders in a tabular form along with PO Name, Status, Created On, PO Amount, and the Estimated Arrival Date.



Purchase Orders By Supplier Report

	Supplier Name	Purchase Order Count	Total amount of Purchase Orders
	Supplier 01	59	$45570

Search:

Serial No.	PO Name	Status	Created On	PO Amount	Estimated Arrival Date
1	PO-1	Completed	7/28/2021 3:40 PM	$30.00	-
2	PO-2	New	7/29/2021 11:11 AM	$600.00	-
3	PO-3	Completed	7/30/2021 4:01 PM	$20.00	-
4	PO-4	Completed	7/30/2021 4:11 PM	$30.00	-
5	PO-5	Completed	7/30/2021 4:26 PM	$60.00	-

Showing 1 to 5 of 59 entries

1 2 3 4 5 ... 12 Next

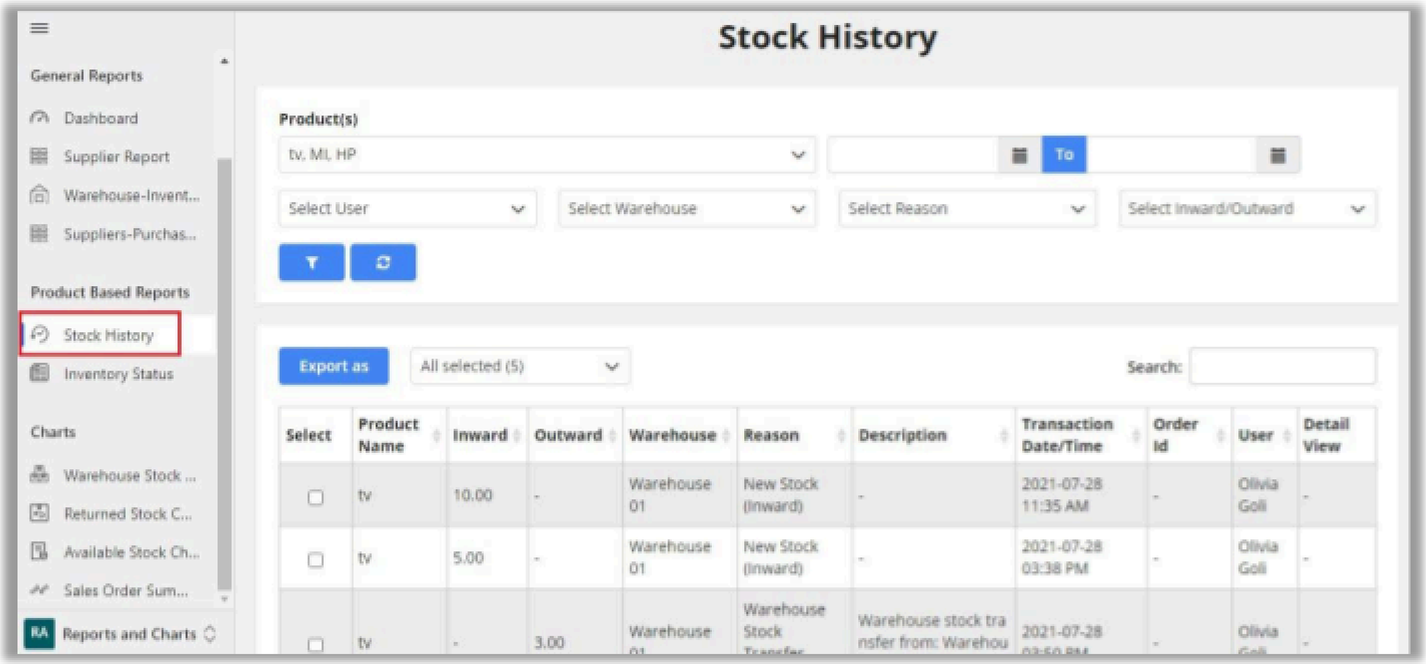
	Supplier Name	Purchase Order Count	Total amount of Purchase Orders
	Supplier02	14	$420
	Checking	4	$6120

- You will get the navigation to check the next records if there are many records.

Product Based Reports

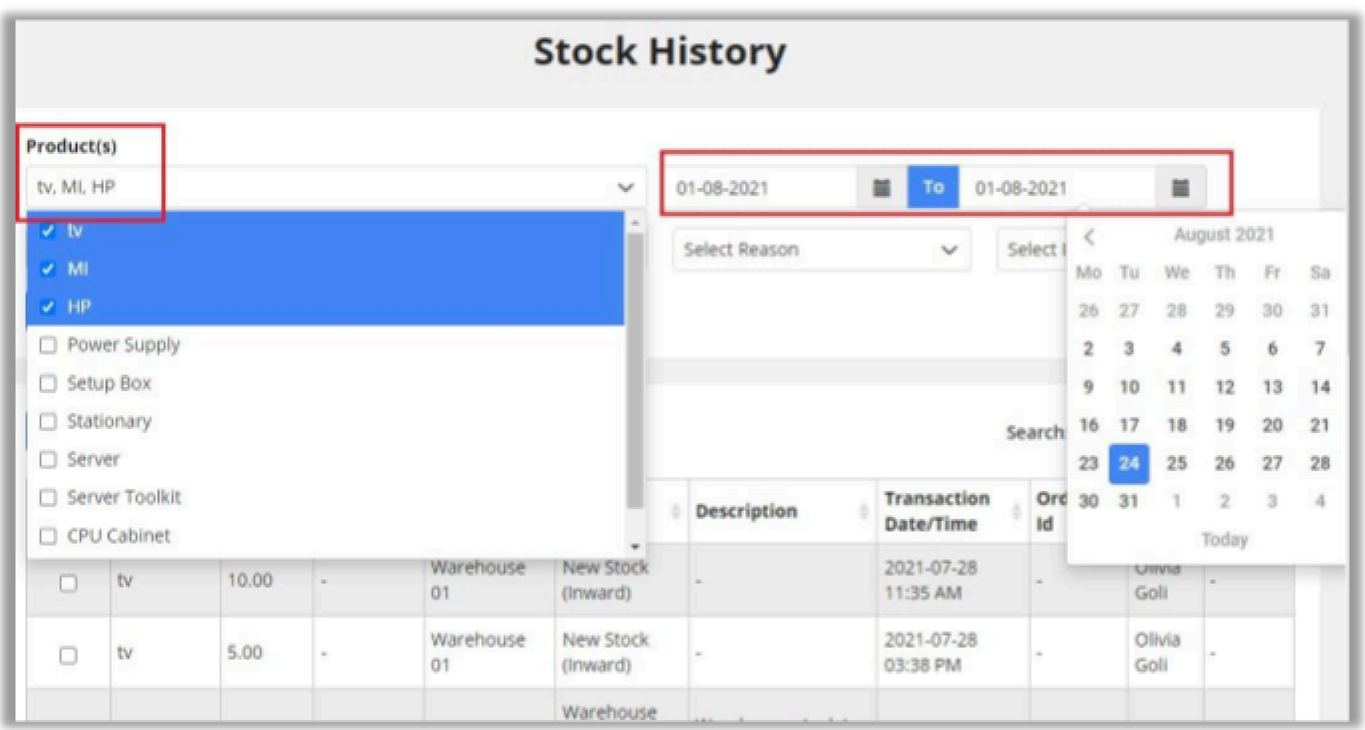
Stock History

- Stock History allows users to view the stock transaction history of multiple products with a single click. You can check the Stock History for the products as per the specific Date Range, Users, Warehouse, Reason, and Inward/Outward.



Select Product(s)

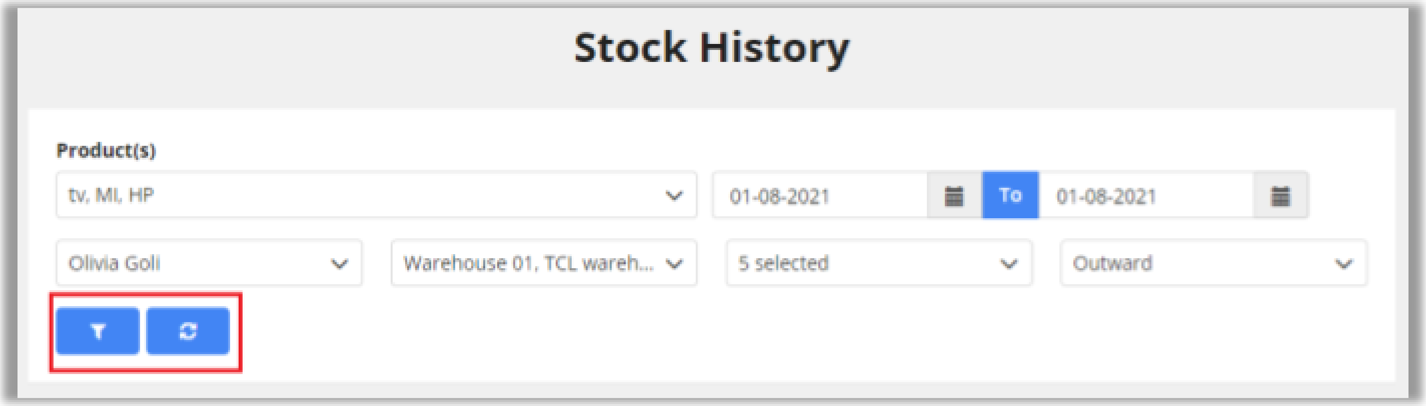
- You will get the drop-down list of the products to view the stock transaction history of multiple products. Select the products from the dropdown list.



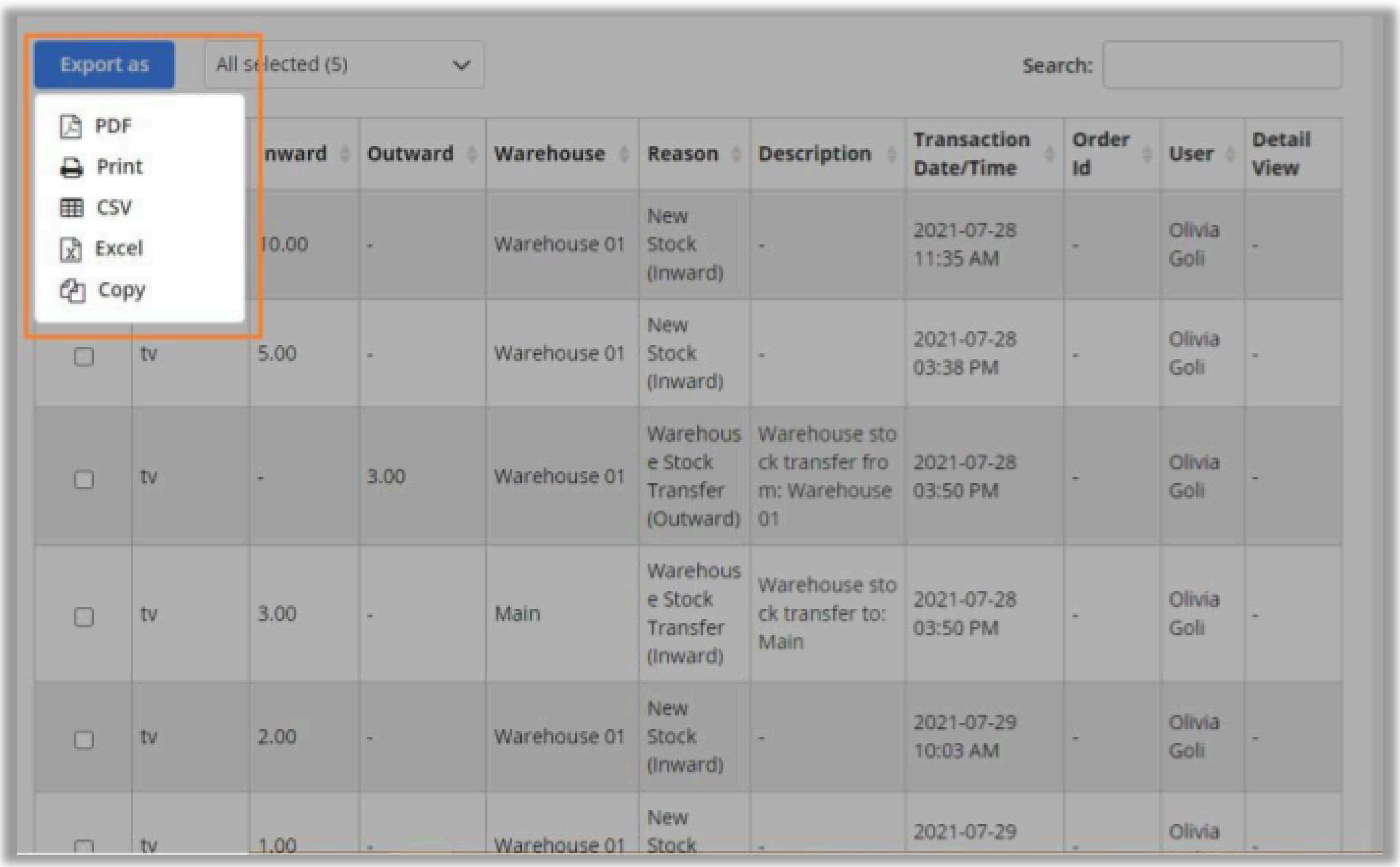
Date Range

- You can select the specific "Date Range" to get the stock history records in a specific duration.
- You can filter the Stock Transaction History by selecting the following options:

  > User-wise > Warehouse-wise > Reason-wise >Transaction-wise.



- You can search the records as per selected filter options by clicking on the 'filter' icon. You can remove the filter search by clicking on the 'refresh' icon.
- You will get stock history records if you have selected options to filter the records.

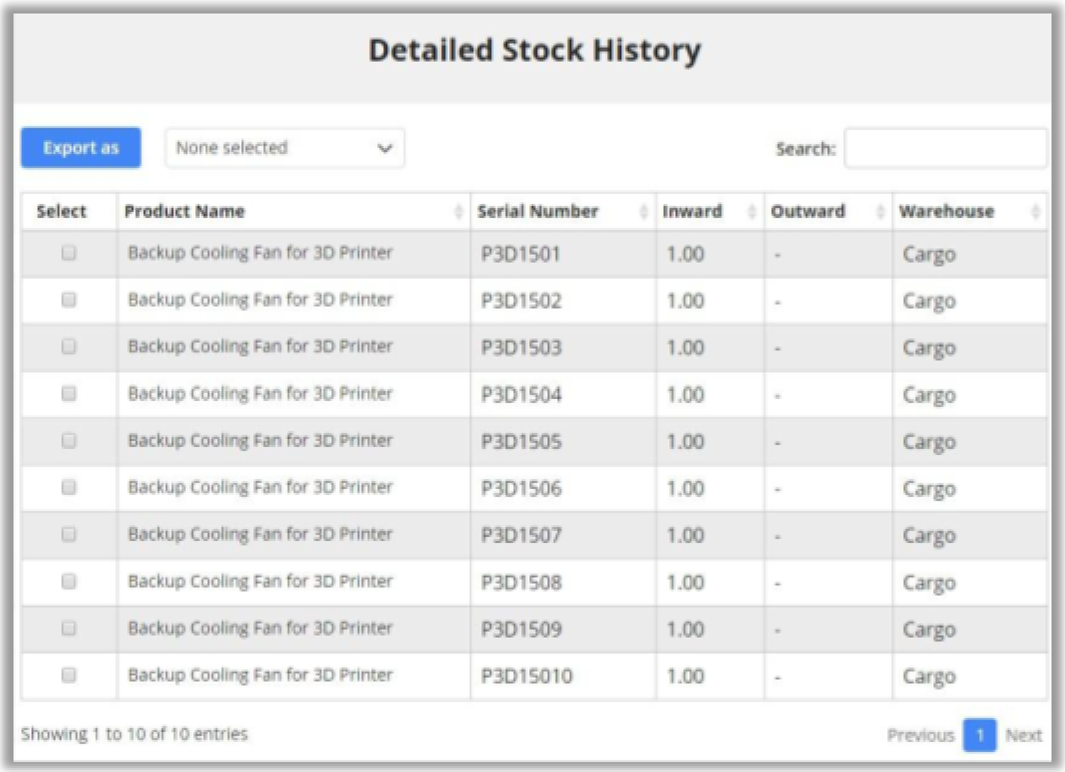


- **Export as**: You can take a printout of the whole or selected records of stock history. You can export it to PDF, CSV, and Excel format.
  Note: Warehouse of serial number product for outward transaction won't be displayed as there can be multiple warehouses for different serial number product in 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.

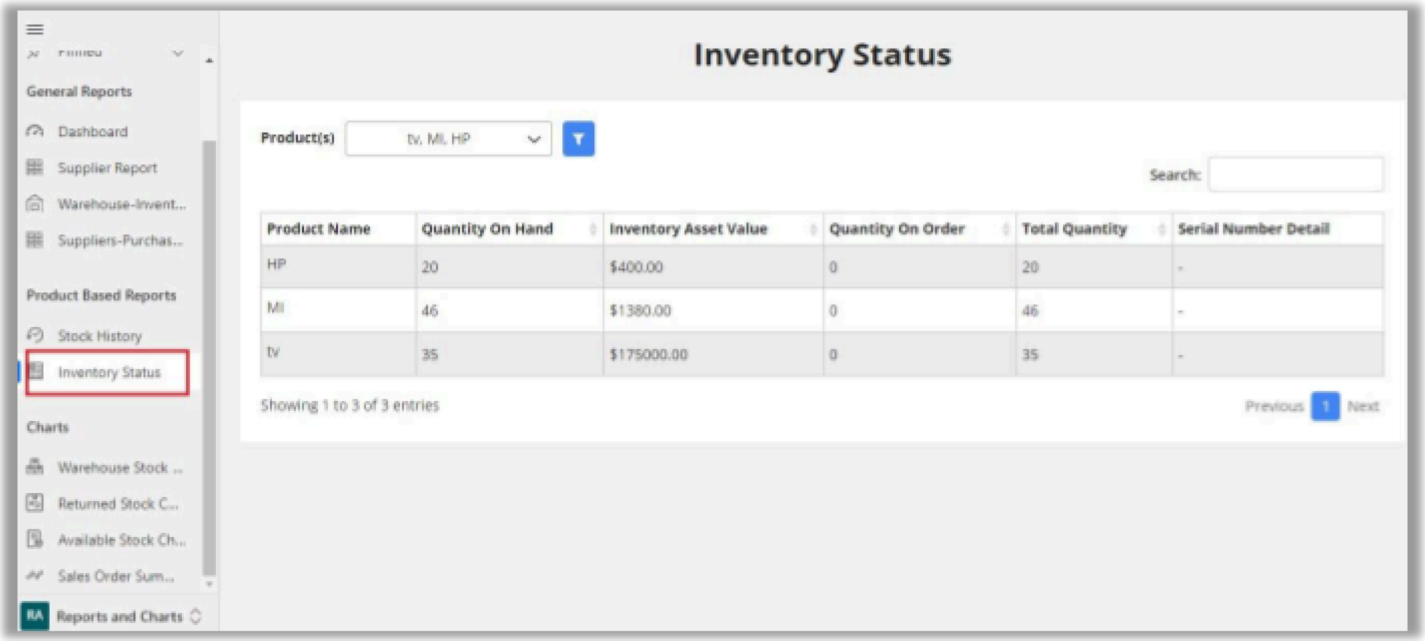
- This report can be exported as pdf, csv or excel file. You can also copy and take print of selected or all records.



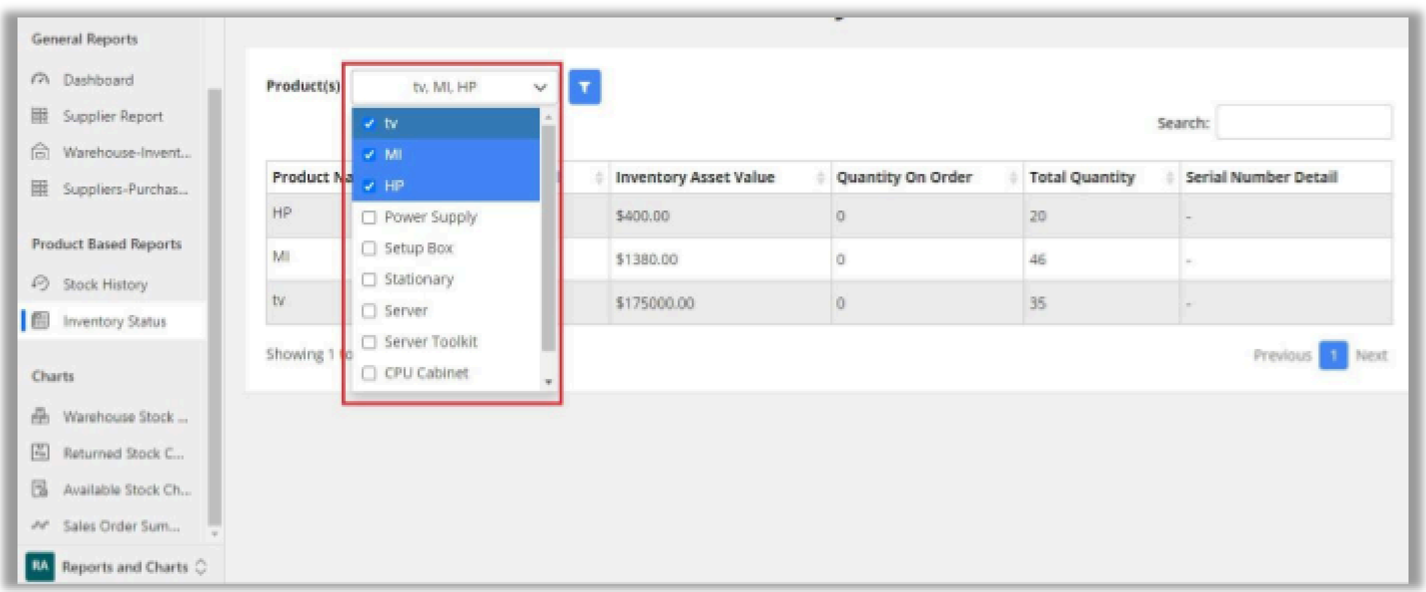
Select	Product Name	Serial Number	Inward	Outward	Warehouse
	Backup Cooling Fan for 3D Printer	P3D1501	1.00	-	Cargo
	Backup Cooling Fan for 3D Printer	P3D1502	1.00	-	Cargo
	Backup Cooling Fan for 3D Printer	P3D1503	1.00	-	Cargo
	Backup Cooling Fan for 3D Printer	P3D1504	1.00	-	Cargo
	Backup Cooling Fan for 3D Printer	P3D1505	1.00	-	Cargo
	Backup Cooling Fan for 3D Printer	P3D1506	1.00	-	Cargo
	Backup Cooling Fan for 3D Printer	P3D1507	1.00	-	Cargo
	Backup Cooling Fan for 3D Printer	P3D1508	1.00	-	Cargo
	Backup Cooling Fan for 3D Printer	P3D1509	1.00	-	Cargo
	Backup Cooling Fan for 3D Printer	P3D15010	1.00	-	Cargo

Inventory Status

- You can view the status of the Inventory with the specific details with a single click. You will get the inventory status in tabular form along with Product Name, Qty on Hand, Inventory Asset Value, Qty on Order, Total Qty, and Serial Number Detail.



- You will get the dropdown selection for the products. You can select the products to check the product's inventory status.

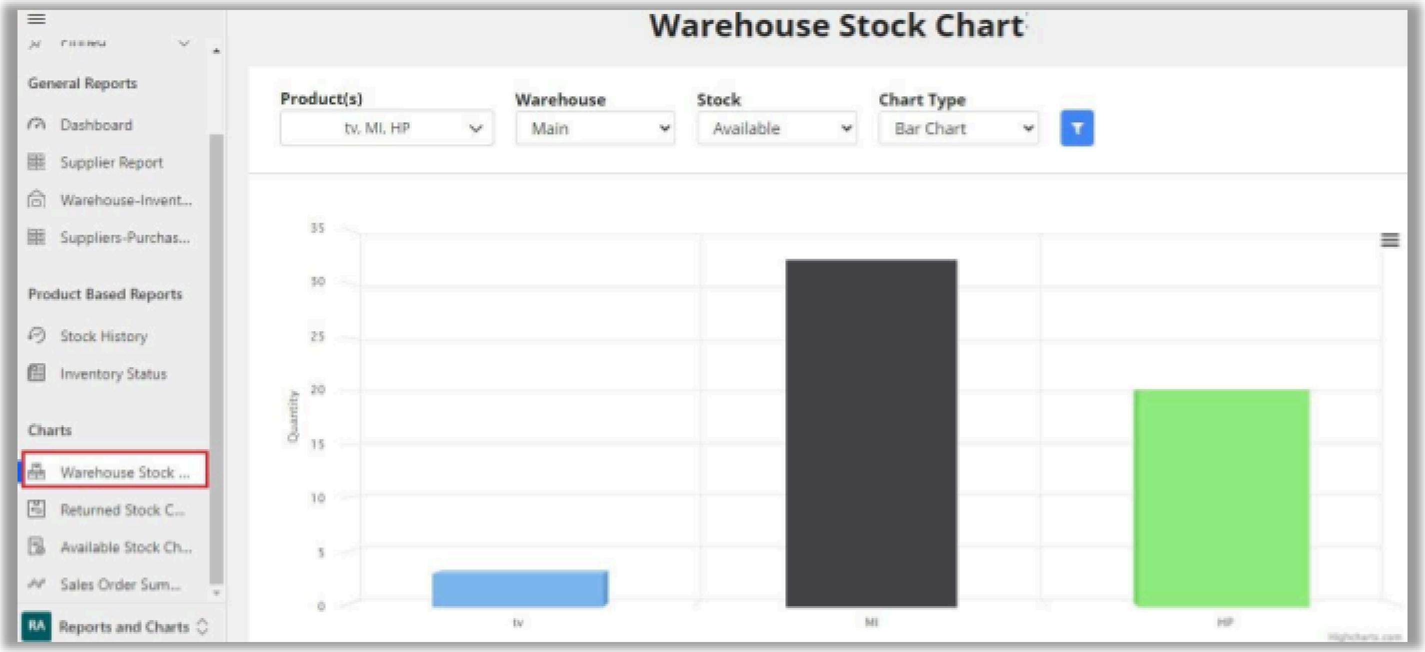


- After selecting the products from the list, you need to click on the 'filter' icon

Charts

Warehouse Stock

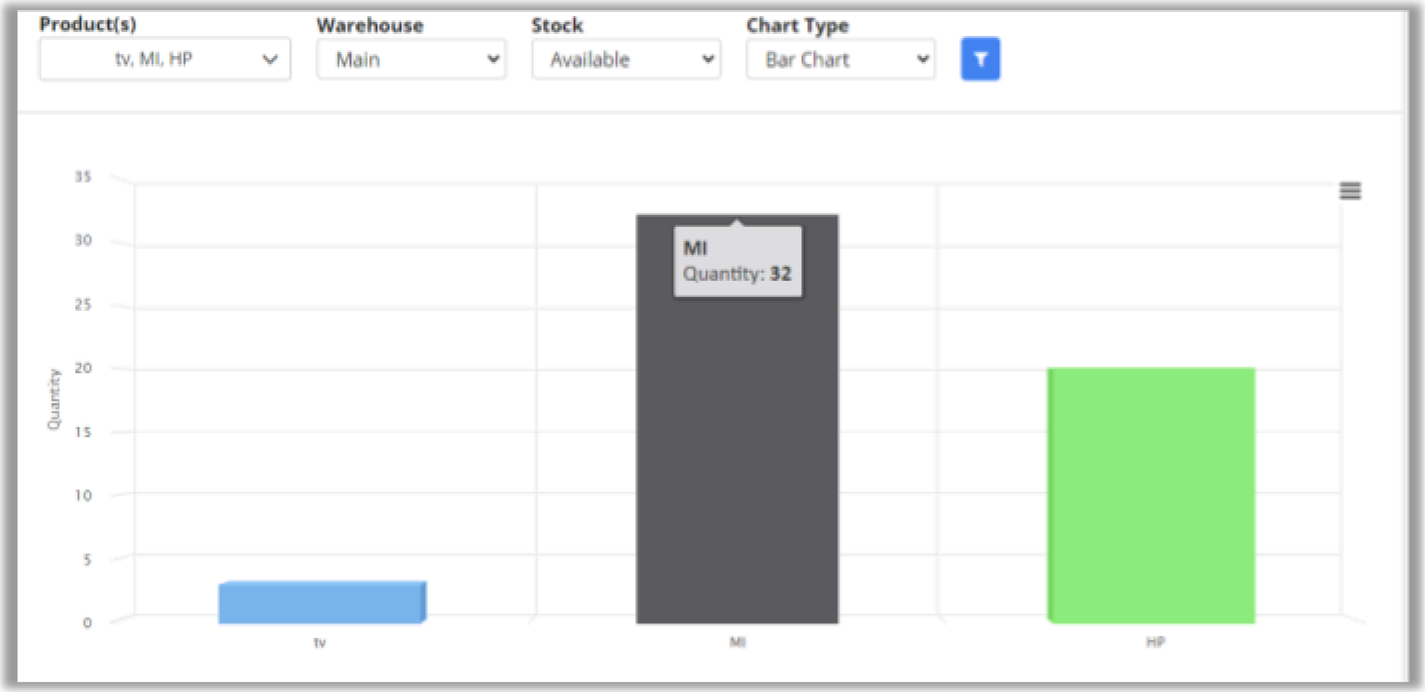
- You can get the **Warehouse Stock** analysis in the charts. You will get the chart displays a "Bar Chart", "Pie Chart" and "Line Graph" for the selected products.



- You can filter the options to get the chart analysis by selecting the Products, Warehouse and, Stock.

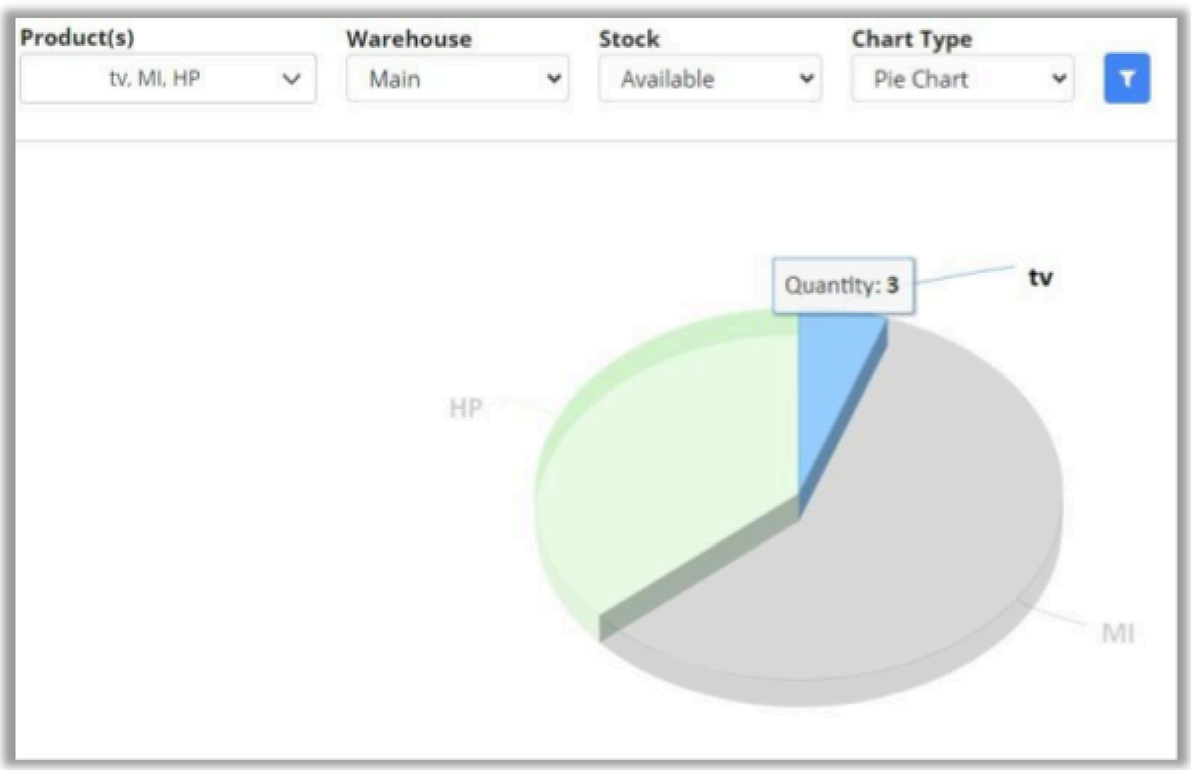
Bar Chart

- You will get the details of the product if you hover the mouse on the bar.



Pie Chart

- You will get the details of the product if you hover the mouse on the graphics. You will get the 3D representation.



Line Graph

- You will get the details of the product if you hover the mouse on the line.

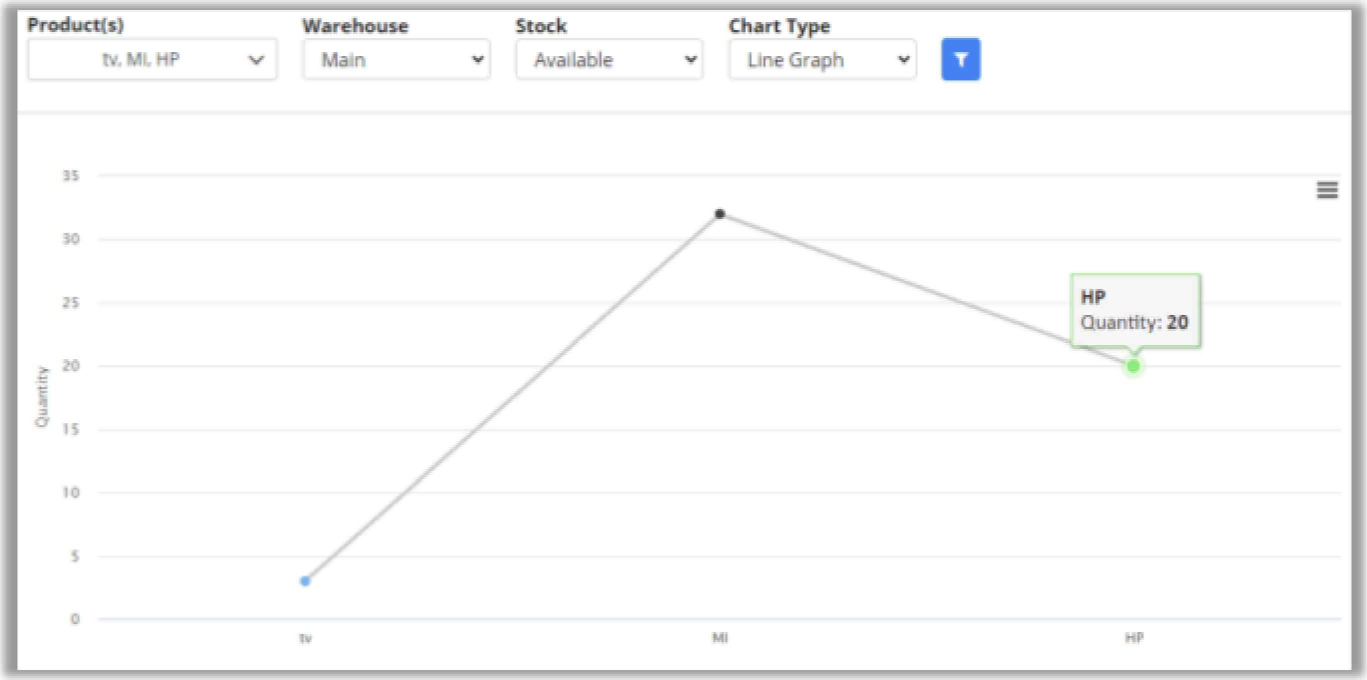
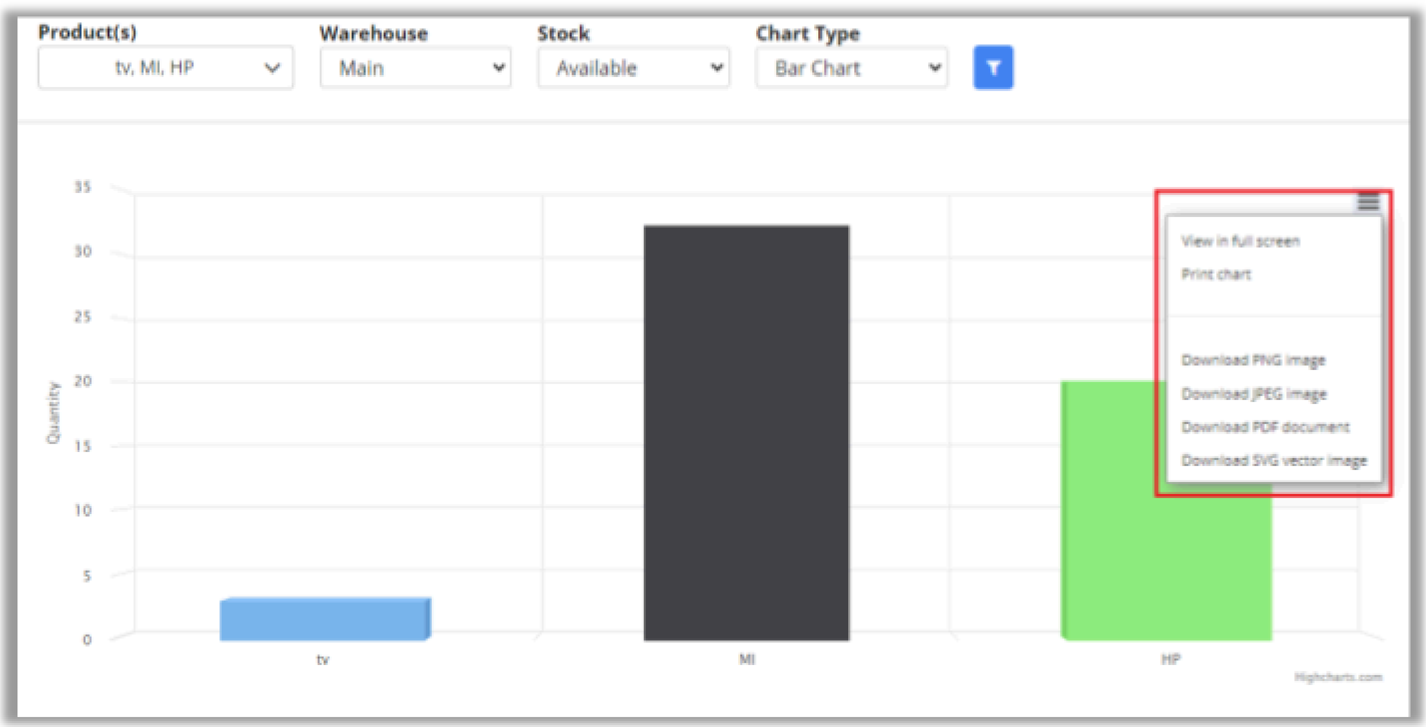
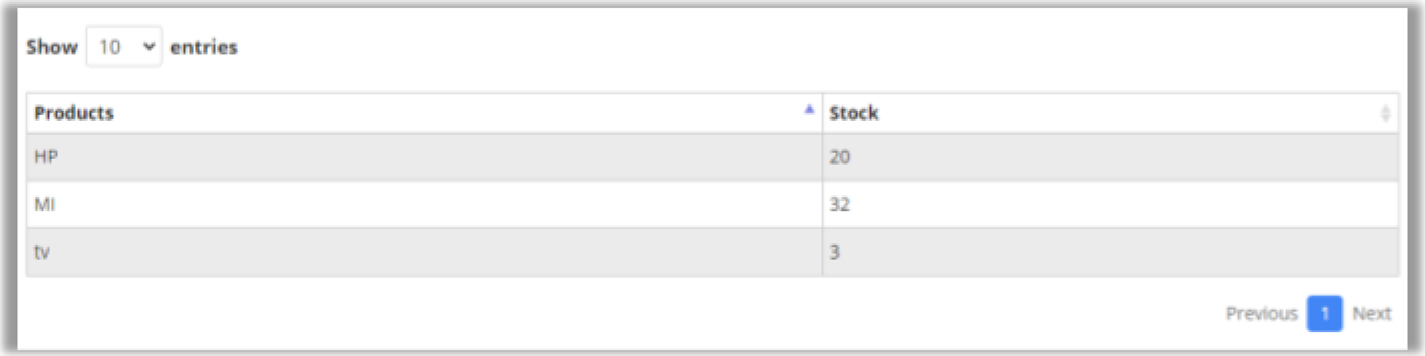


Chart Options

- You will get the Chart options like print and download as images for all three charts. You will get the following options for the charts: View in Full Screen, Print Chart, Download charts as PNG & JPEG image, Download PDF Document, and SVG Vector Image.



- By scrolling down, you will get the “Product Name” and the “Quantity (stock)” in the tabular format below every chart (Bar, Pie, and Line).

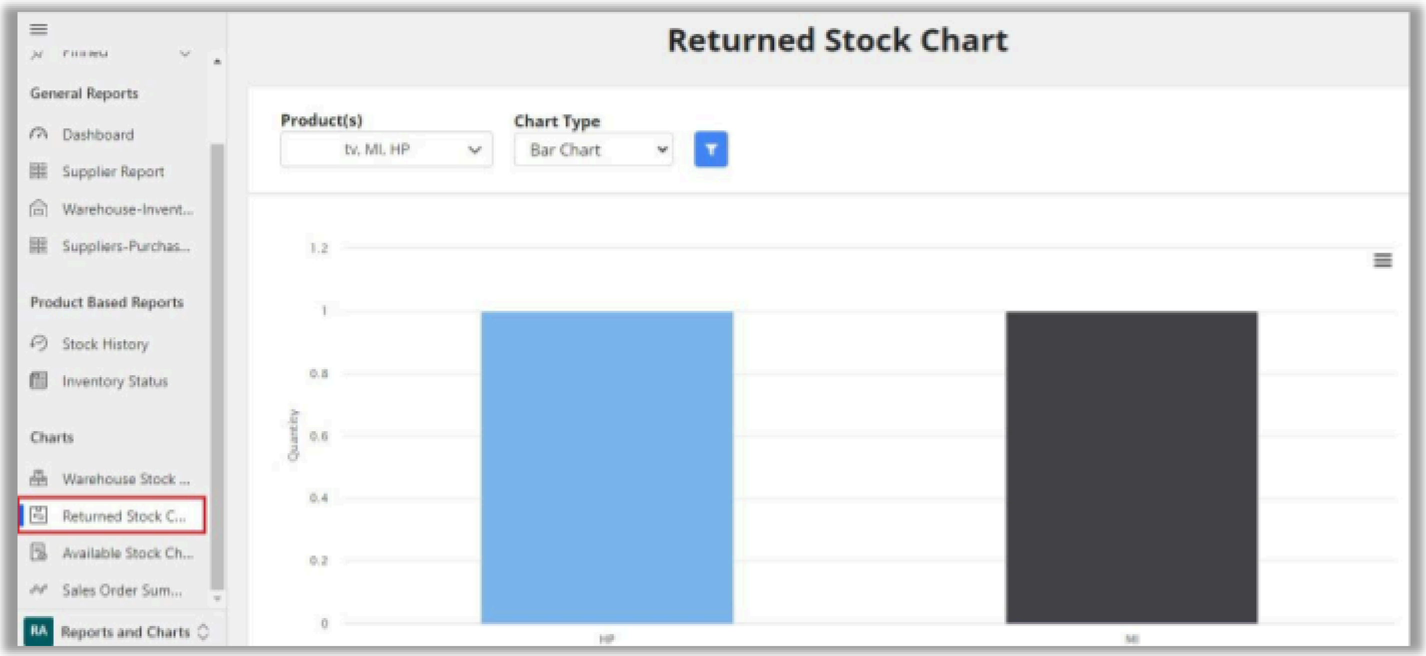

Show 10 entries

Products	Stock
HP	20
MI	32
tv	3

Previous 1 Next

Returned Stock Chart

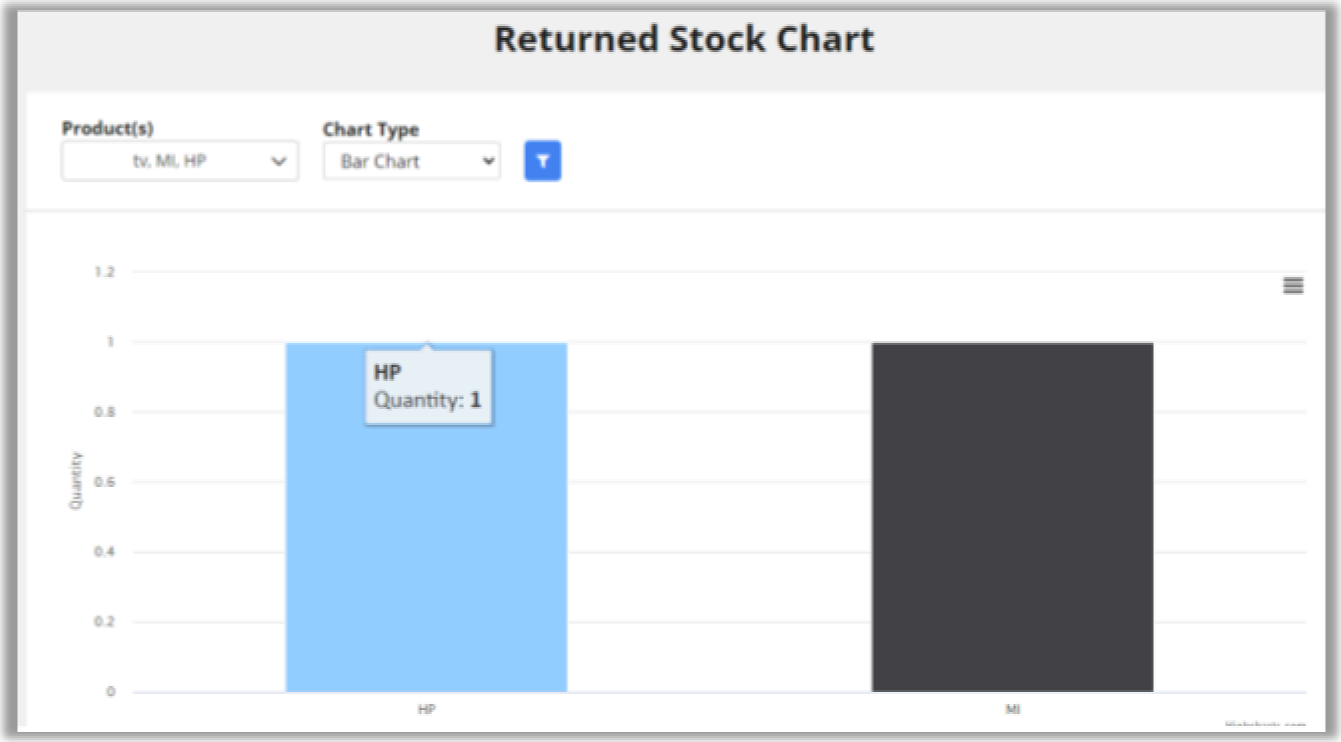
- You can get the Returned Stock analysis in the charts. You will get the chart displaying a “Bar Chart”, “Pie Chart” and “Line Chart” for the returned stocks of the selected products.



- You can filter the options to get the chart analysis by selecting the Product(s).
- By scrolling down, you will get the “Product Name” and the “Quantity (Returned stock)” in the tabular format below every chart (Bar, Pie, and Line).

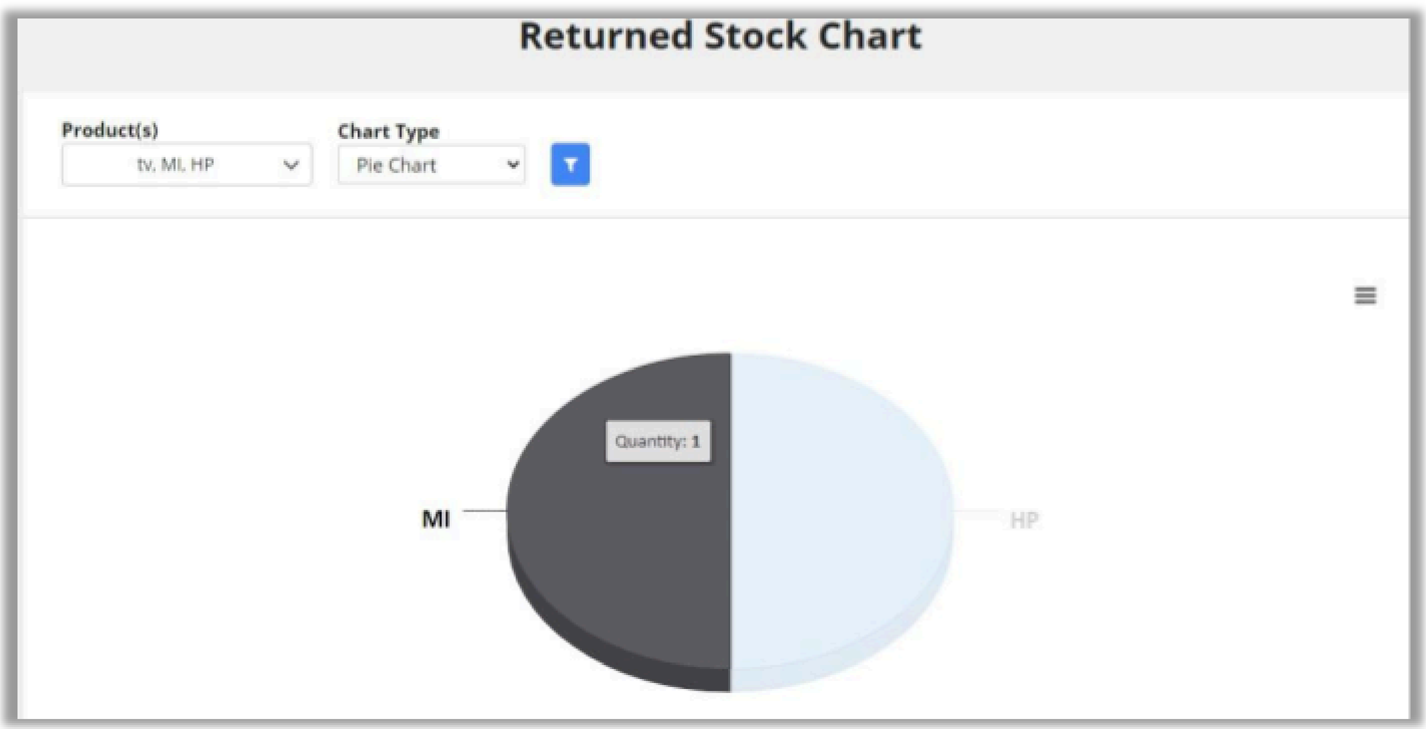
Bar Chart

- You will get the details of the product if you hover the mouse on the bar.



Pie Chart

- You will get the details of the product if you hover the mouse on the graphics. You will get the 3D representation.



Line Graph

- You will get the details of the product if you hover the mouse on the line.

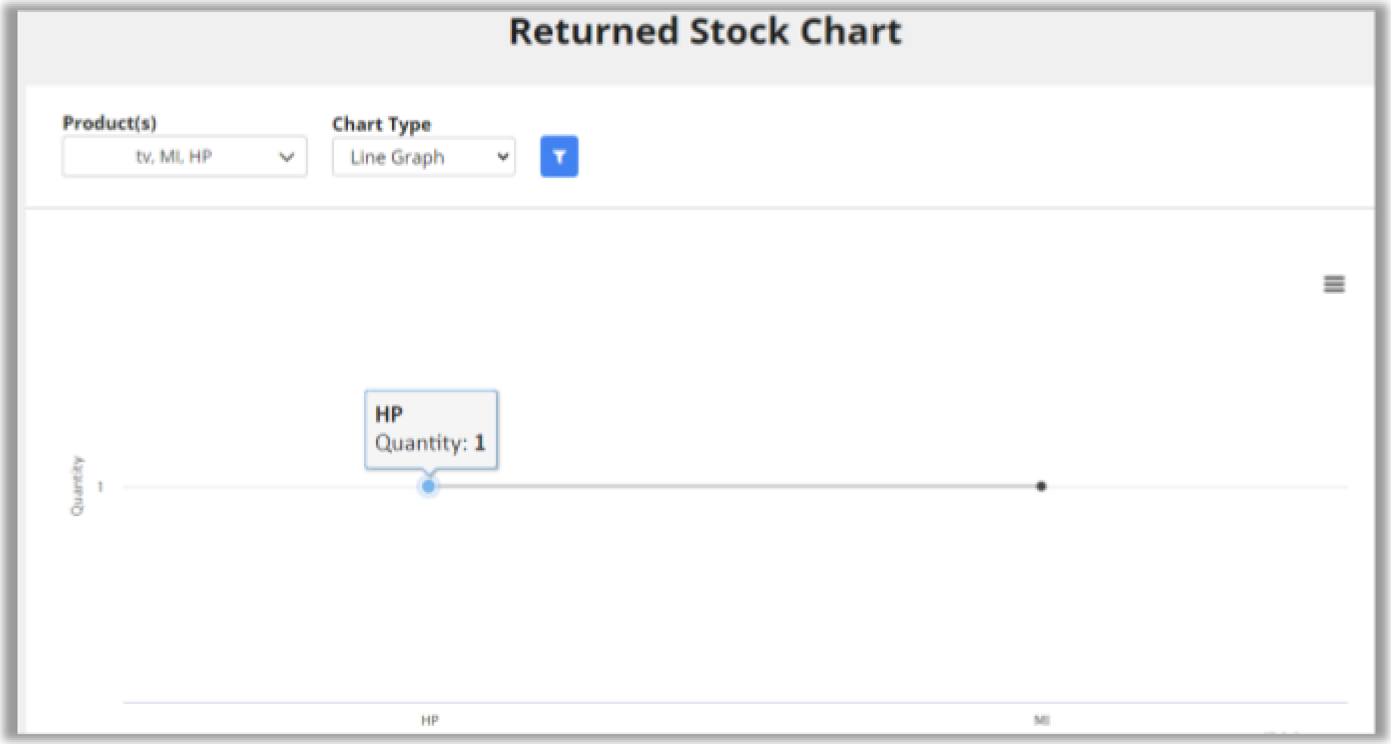
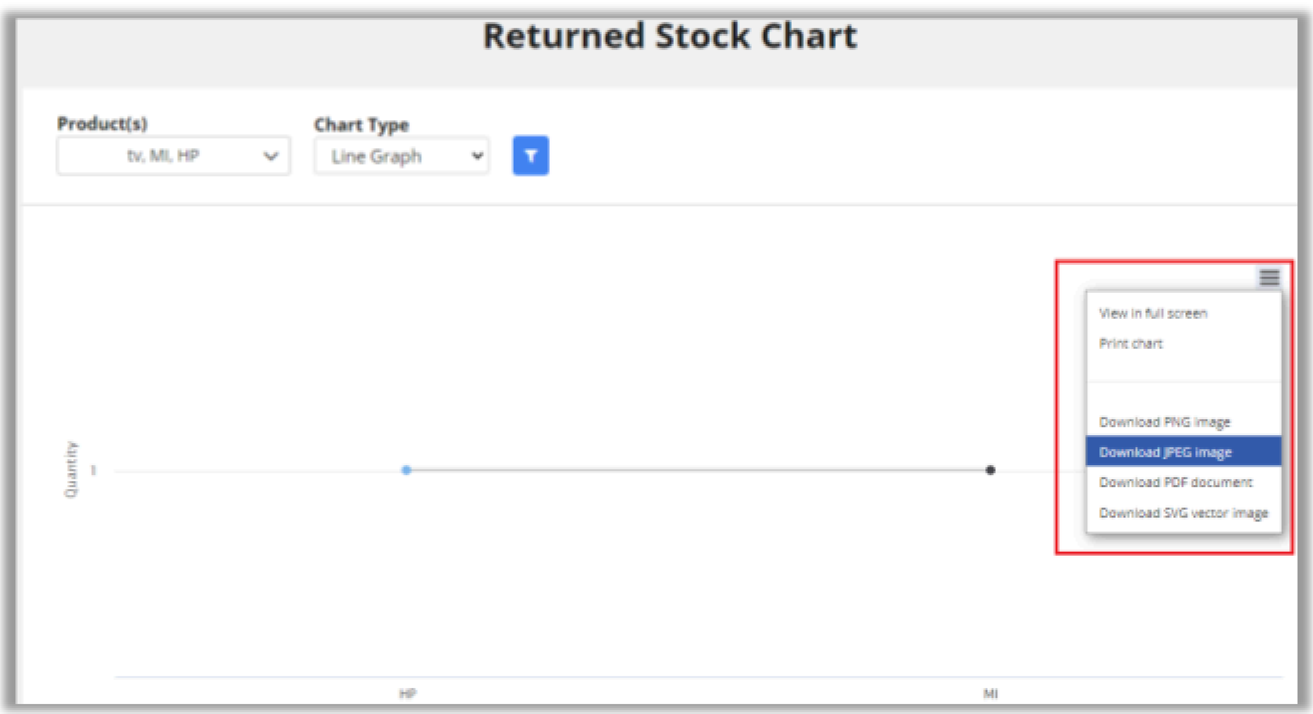
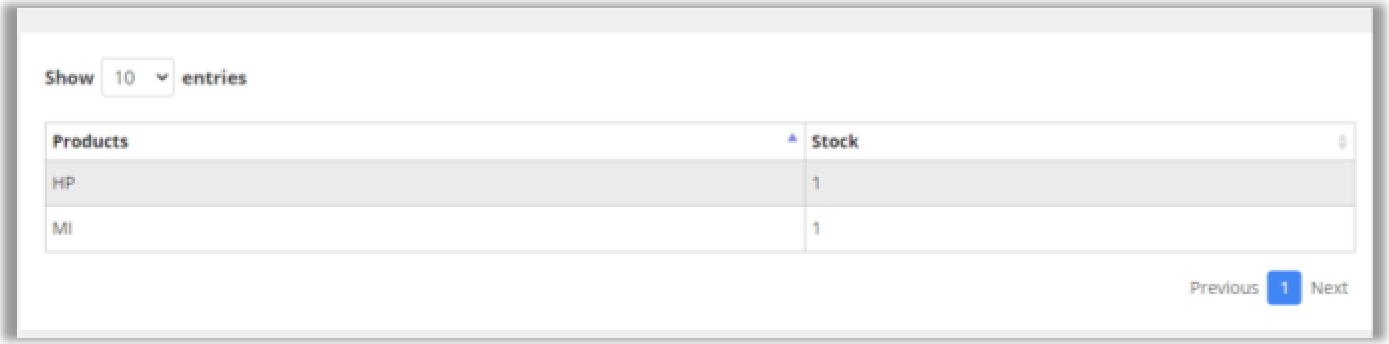


Chart Options

- You will get the Chart options like print and download as image for all three charts. You will get following options for the charts: View in Full Screen, Print Chart, Download charts as PNG & JPEG image, Download PDF Document, and SVG Vector Image.



- By scrolling down, you will get the “Product Name” and the “Quantity (Returned Stock)” in the tabular format below every chart (Bar, Pie, and Line).



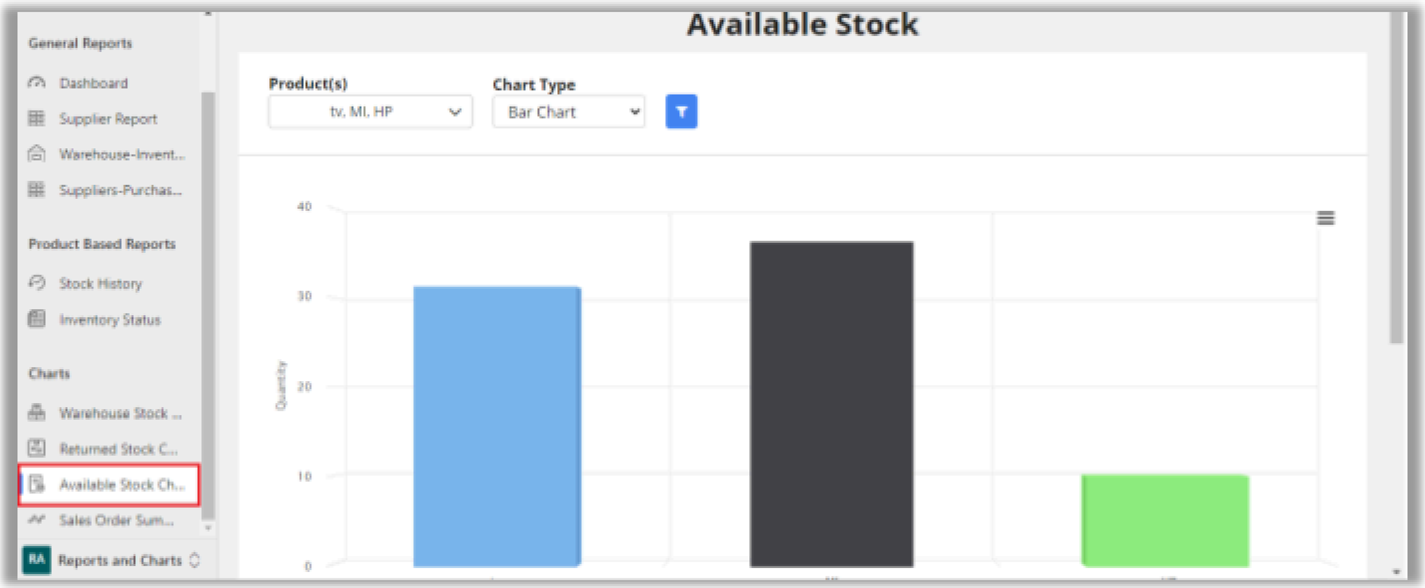
Show 10 entries

Products	Stock
HP	1
MI	1

Previous 1 Next

Available Stock

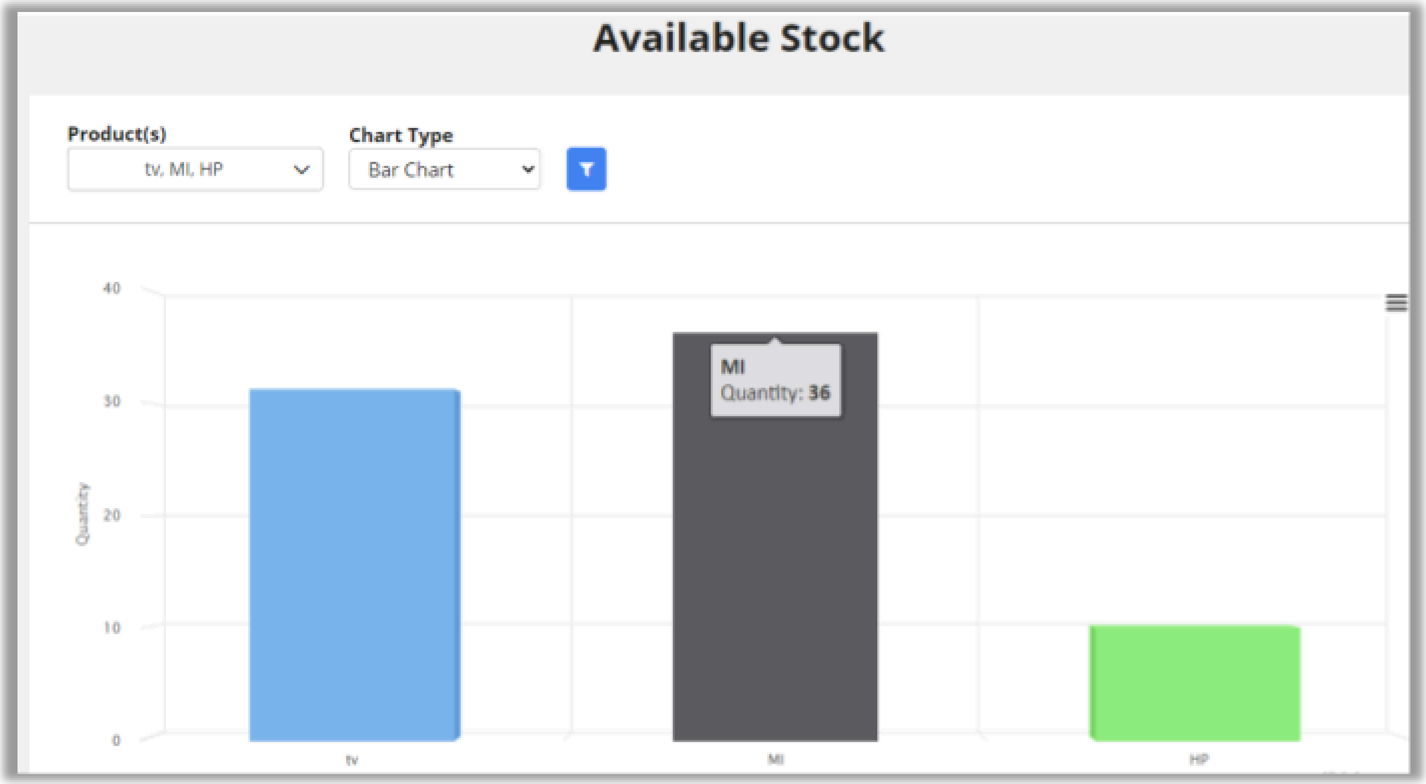
- You can get the Available Stock analysis in the charts. You will get the chart displays a “Bar Chart”, “Pie Chart” and “Line Chart” for the available stocks of the selected products.



- You can filter the chart analysis by selecting the Product(s) for available stock.

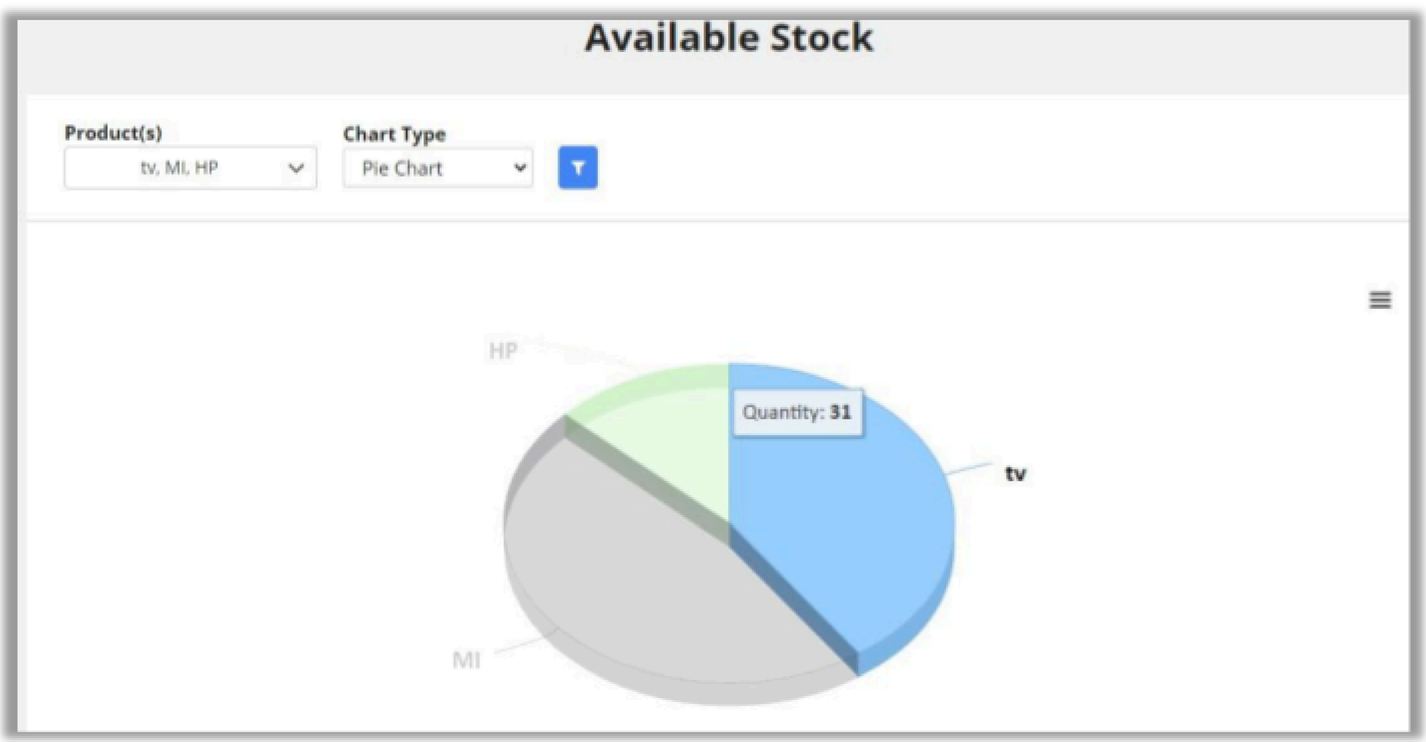
Bar Chart

- You will get the details of the product if you hover the mouse on the bar.



Pie Chart

- You will get the details of the product if you hover the mouse on the graphics. You will get the 3D representation.



Line Graph

- You will get the details of the available stocks of the product if you hover the mouse on the line.

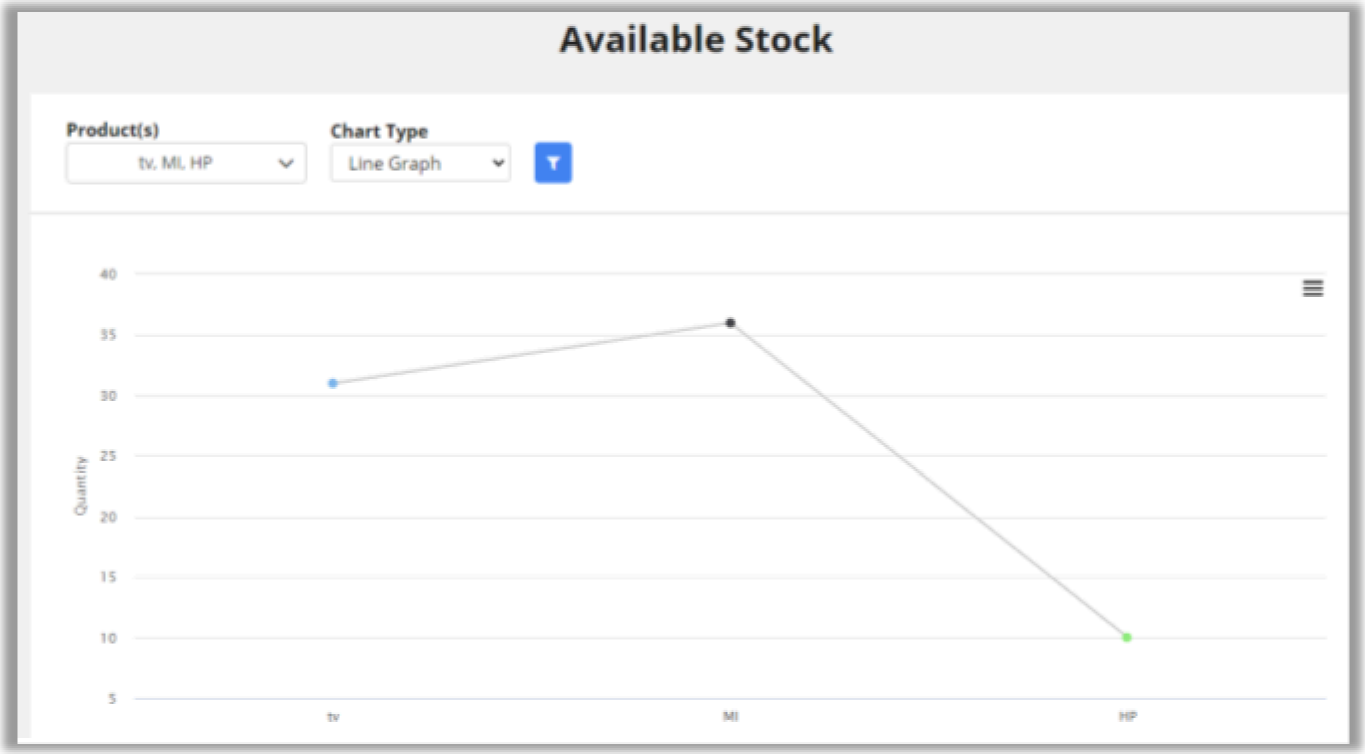
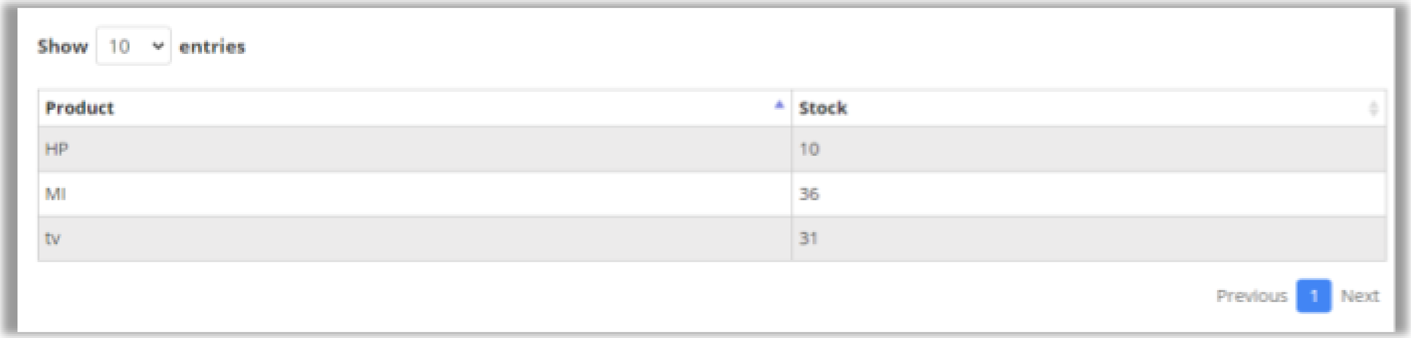


Chart Options

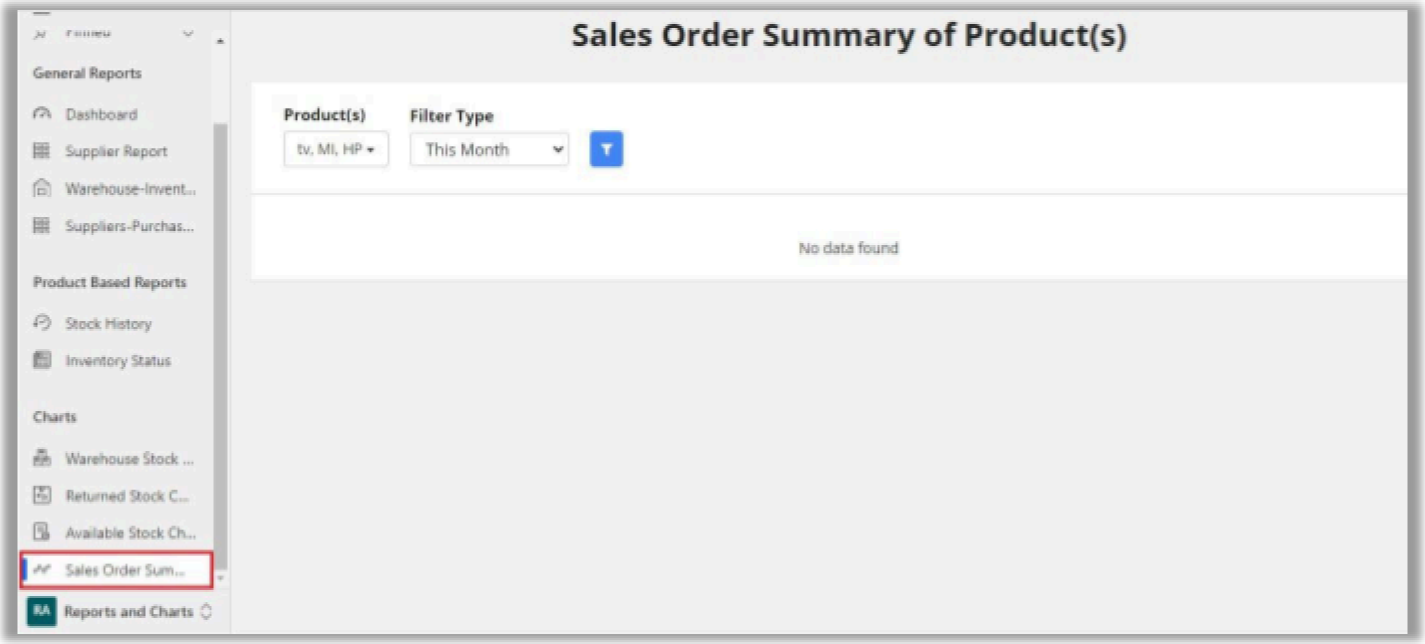
- You will get the Chart options like print and download as images for all three charts. You will get the following options for the charts: View in Full Screen, Print Chart, Download charts as PNG & JPEG image, Download PDF Document, and SVG Vector Image.

- By scrolling down, you will get the “Product Name” and the “Quantity (Available Stock)” in the tabular format below every chart (Bar, Pie, and Line).

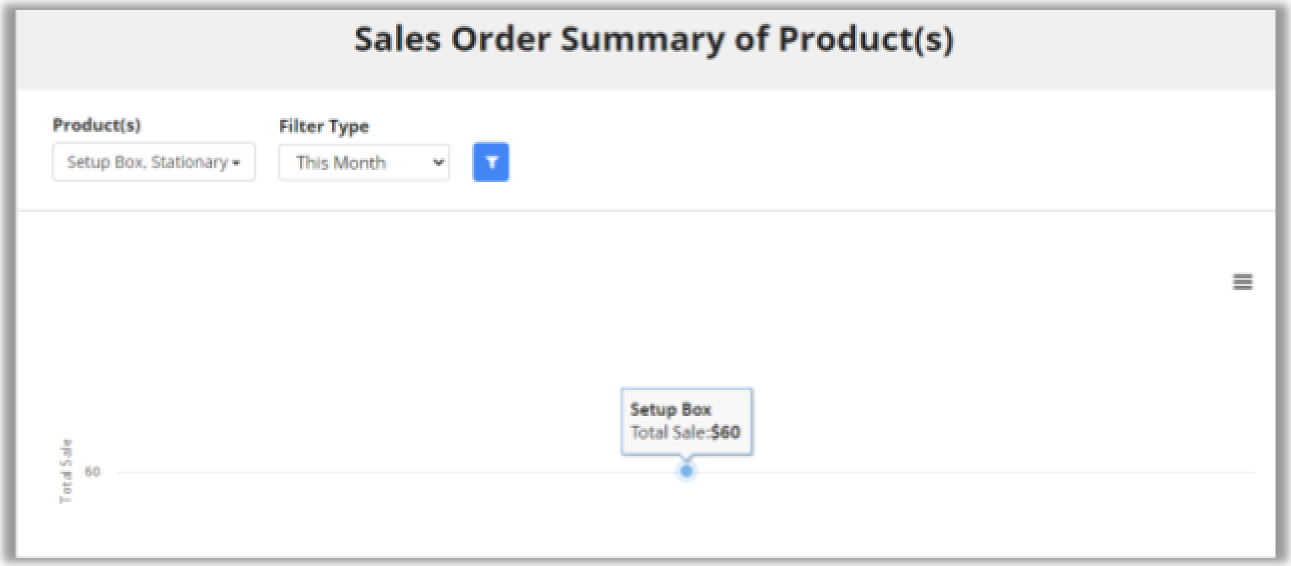


Sales Order Summary

- You can check the sales order records as per filtering the Product(s).



- You will get the Sales Order Summary in Line Graph for the sales order of the product(s).



- You will get the details of the available stocks of the product if you hover the mouse on the line.

Chart (Line Graph) Options

- You will get the Chart options like print and download as images for all three charts. You will get the following options for the charts: View in Full Screen, Print Chart, Download charts as PNG & JPEG image, Download PDF Document, and SVG Vector Image.

Show 10 entries

Product Name	Quantity Sold	Total Sale
Setup Box	2	$60

Showing 1 to 1 of 1 entries

Previous 1 Next

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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