



Microsoft Dynamics CRM / XRM Platform



# User Guide



**CRM Versions Supported : CRM 2011 and CRM Online**

Sales Product Editor is Product Transaction Editor for Microsoft Dynamics CRM 2011 and CRM Online. As the one-page quote process that works from opportunity to quote, to order, to invoice. An Excel-like record adding grid saves time and clicks.

Coding Version : 1.0

Document Version 1.0

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## Product Overview

Sales Product Editor for Microsoft Dynamics CRM 2011 and CRM Online is an easy add-in for making existing CRM View listings Excel-like to allow in-place editing to save lots of time and clicks! Works on any CRM standard or custom grid and works with all field types. Settings area control and Security Role compliance allows easy configuration control and user editing privilege security. Alternately “Editable Grid” is great for adding records in an Excel-like grid with just a click away.

New records can now be added without opening any new windows or forms and without ever leaving the list. Multiple new rows can be added at once and the user can modify existing rows at the same time, saving all of their changes with one click. Default Values and Event-based fields formerly restricted to User Input screens can now be configured for new Sales Product Editor rows. Placing the cursor on any CRM record column and row combination “Cell” just like in Microsoft Excel allows easy editing in all directions using the standard keyboard movement controls. Sales Product Editor has ability to build data sets easily in all areas of CRM.

Sales Product Editor is excellent for data building and manipulation in CRM functions like Quote Product entry where Existing and Write-in products can be added simultaneously to a section you place on your CRM forms appropriate to your business process needs. The new Excel-like grid opens up a new blank bottom row after tabbing through the end of the columns. Easily edit any row after entry to more quickly build, review, and refine your complete set. Alternately a similar product, “Editable Grid”, is great for editing records though-out your existing standard or custom CRM View listings in any Entity in an Excel-like grid.

Sales Product Editor can be easily added to a few, many, most or all CRM View listing grids in accordance with how easy you want to avail in-place editing to your CRM users. Settings area control and Security Role compliance allows easy configuration control and user editing privilege security. It allows you enhanced user control of CRM data more appropriate, comfortable, and efficient for their periodic updating needs.

## Sales Product Editor Allows Users to:

- ✓ Sales Administration will be delighted with the new ease of creating, and refining order-management documents quotes, orders, invoices.
- ✓ Sales staff appreciates the significant improvement and simplification of creating Quotes, Orders, and Invoices.
- ✓ Sales Management appreciates the general improvement in their ability to more easily build data sets in all areas of CRM.
- ✓ The entire company benefits from the enhanced productivity of the sales department when Sales Product Editor increases efficiency

## Key Benefits:

- ✓ Add and edit records faster than ever before for an instant gain in productivity!
- ✓ Multiple new records can now be added without opening any new sub-windows or forms and edited without ever leaving the grid to substantially reduce data entry time.
- ✓ Data accuracy is improved by the ease of data correction thereby encouraging data error maintenance in all levels of the company which improves the company image.
- ✓ Data formatting quality and uniformity greatly enhanced by the ability to audit and edit on-the-fly so easily improves marketing efforts and CRM User appreciation.
- ✓ The significant improvement in the efficiency of adding and editing records results in greater data sets being included in CRM resulting in more marketing reach, and improved sales.
- ✓ Working directly in CRM for building lists that used to be built first in Excel and imported to CRM will bring an immediate ROI on the improvement of operations and speed to customer.
- ✓ Building custom CRM data entry and edit grid capability opens new CRM function opportunities well beyond all the standard CRM Entities to whole new ways of addressing unique business issues building ROI to the CRM investment itself.

## System Requirement

REQUIREMENT	RECOMMENDED
Microsoft Dynamics CRM	Version 2011 (Online or On-Premise)
Browser	Internet Explorer 6 or Internet Explorer 7 with the latest SP or Higher

**\*This solution should be imported to CRM 2011 Solutions.**

### Microsoft Dynamics CRM Web Software Requirements

Microsoft CRM Server is accessed through a client. This client is either Microsoft Internet Explorer or Microsoft Office Outlook. If Outlook, the earliest version permitted is packaged with Microsoft Office 2003 (SP 3).

### Microsoft Dynamics CRM Web Client Requirements

The following operating systems and Internet web browser versions are required:

**MS Windows XP with latest SP or Windows Vista**

**MS Internet Explorer 6 or Internet Explorer 7 with the latest SP or Higher**

## License Key

To install Sales Product Editor you will require License **Key**, which you can get by sending an E-mail request, with your Organization Unique Name. To access your Organization Unique Name Click on **Customization** from Setting pane and then click on **Developer Resources** as shown in Figure 1

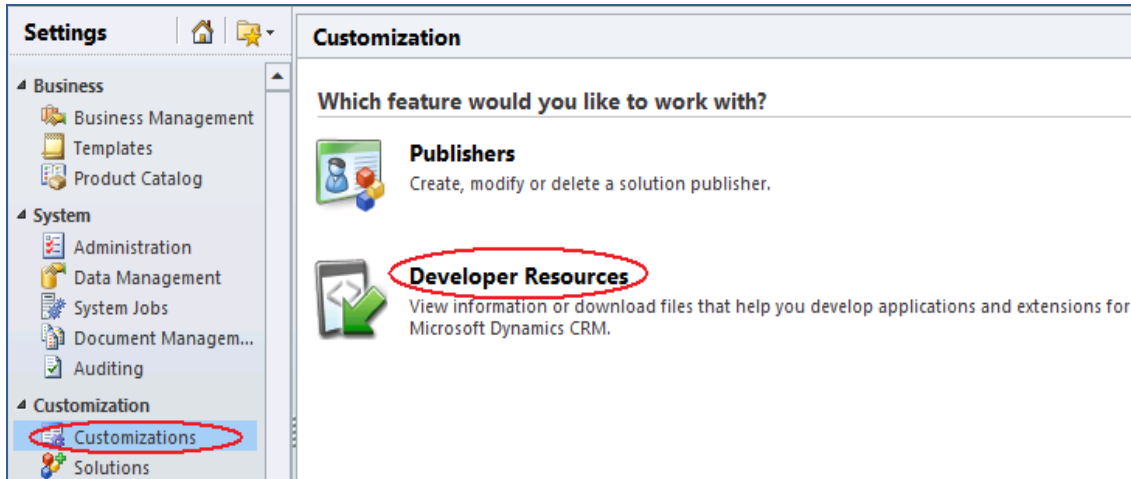


Figure No 1. Customization Window

New window appears with **Organization Unique Name** as shown in Figure 2. Send this Organization Unique Name thru email and you will receive your Licensing **Key** within 24 hours.

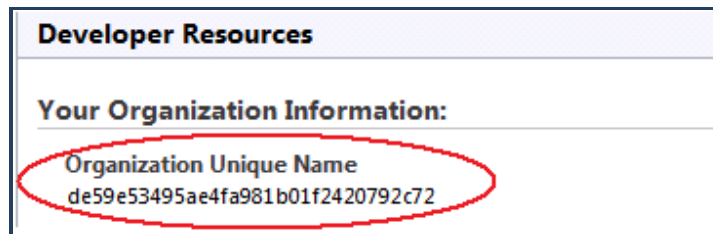


Figure No 2. Unique Name Window

## Online Installation for free trial

Copy paste following web address on the browser <http://www.dynamicsexchange.com/spe.aspx> . Click on **Download Sales Product Editor Trial**.

Open your CRM, to install Sales Product Editor, click on **Settings**→**Solution**→ Browse the file from the location (SalesProductEditor) and then click on **Import** as shown in Figure 3

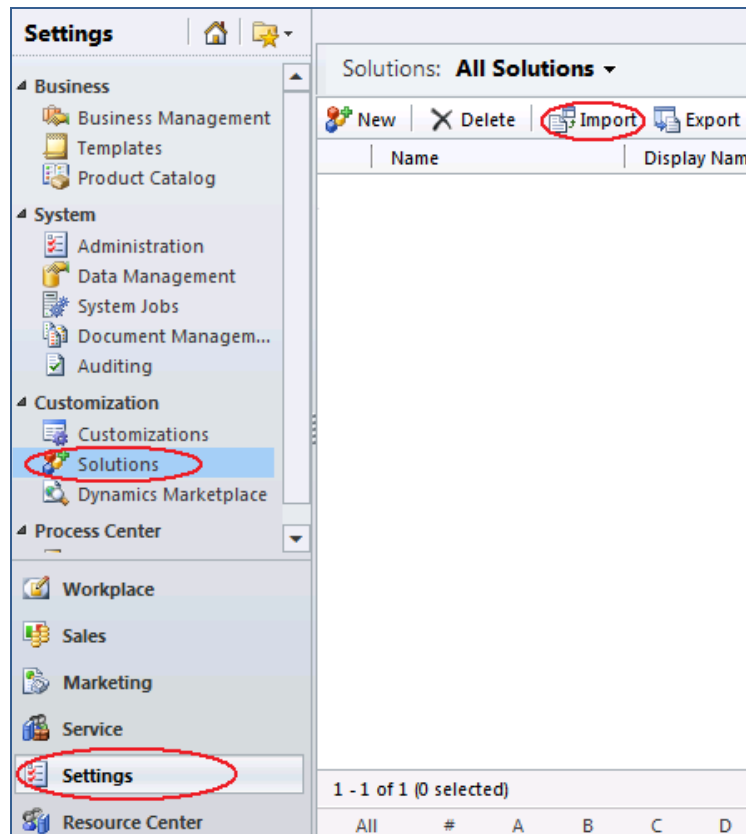
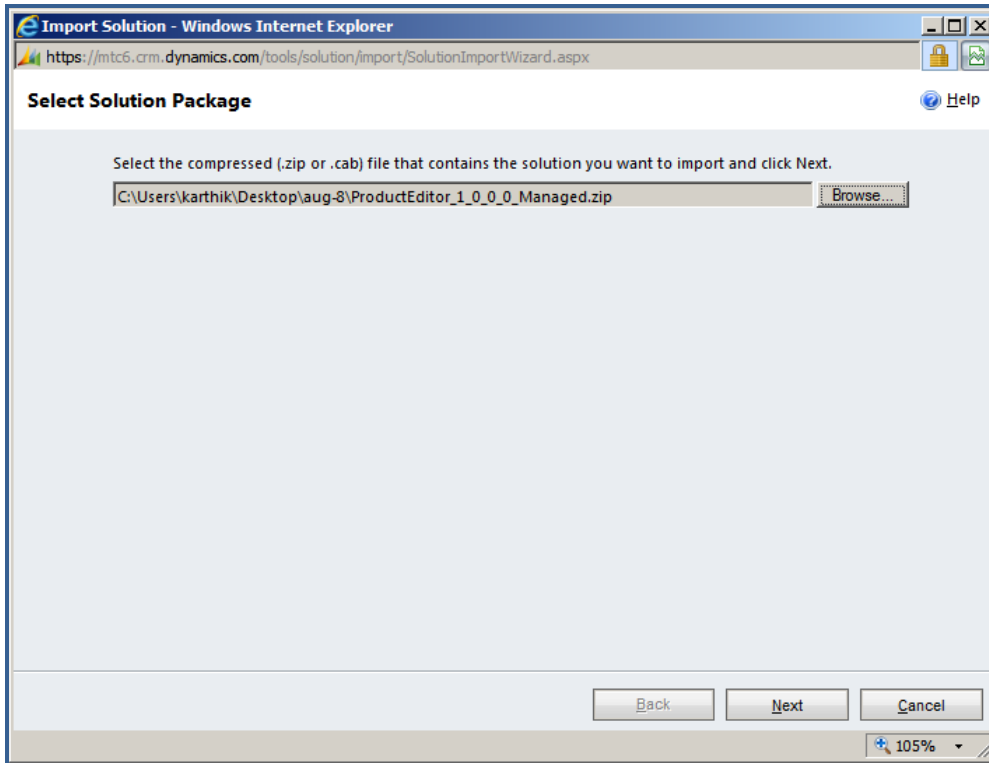


Figure No 3. Setting Window

**Note:- In this manual we are using screen shots for Quote, other two Order & Invoice works in a similar way.**

It opens Import Solution Window where you can browse Mtc SalesProductEditor file and then click on Next until finished as shown in below Figure



**Figure No 4. Import Window**

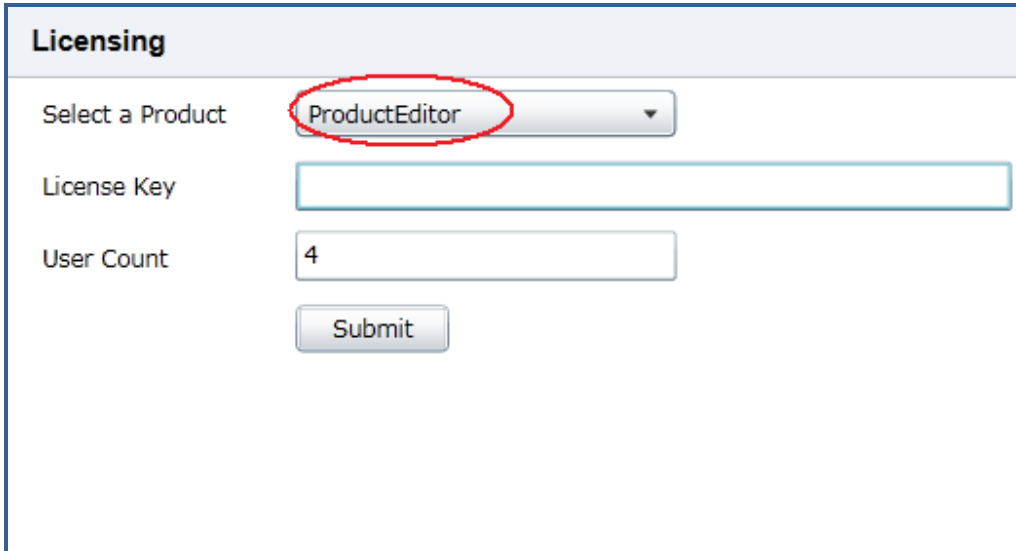
Select the Check Box which comes in between as “Activate any process and enable any SDK message processing steps included in the solution.” Press Next to continue

As soon as the download is completed it starts reflecting in CRM as shown in Figure 5

Solutions: <b>All Solutions</b> ▾			
<input type="button" value="New"/> <input type="button" value="Delete"/> <input type="button" value="Import"/> <input type="button" value="Export"/> <input type="button" value="Import Translations"/>			
	Name	Display Name	Version
<input type="checkbox"/>	EditableGridButtonConta...	Editable Grid Button Con...	1.0.0
<input type="checkbox"/>	MTCSolution	MTCSolution	1.0.0.0
<input type="checkbox"/>	Licensing	Licensing	1.0.0
<input type="checkbox"/>	SitemapEditor	Sitemap Editor	1.0.0.0
<input type="checkbox"/>	<b>ProductEditor</b>	Product Editor	1.0
<input type="checkbox"/>	EditableGrid	EditableGrid	1.0.0.0
<input type="checkbox"/>	AddEditGrid	AddEditGrid	1.0.0.0

**Figure No 5. Solution Window**

Double Click on the **Product Editor** solution, it opens Licensing Window select **Product Editor** from drop down as shown in Figure 6, and enter license key which you have received thru email after placing a request for the same



Licensing	
Select a Product	ProductEditor
License Key	
User Count	4
<input type="button" value="Submit"/>	

Figure No 6. Licensing Window

**Note:- You will receive License key within 24 hours after placing the request thru e-mail.**

## Primus Installation for Sales Product Editor

To install Sales Product Editor on Primus, follow the same steps as for Online Installation, from Setting Window from Figure no 4.

## Web Resources Properties

To access Web Resources Properties Click on **Setting**→**Customization**→**Customize the System** as shown in Figure 7

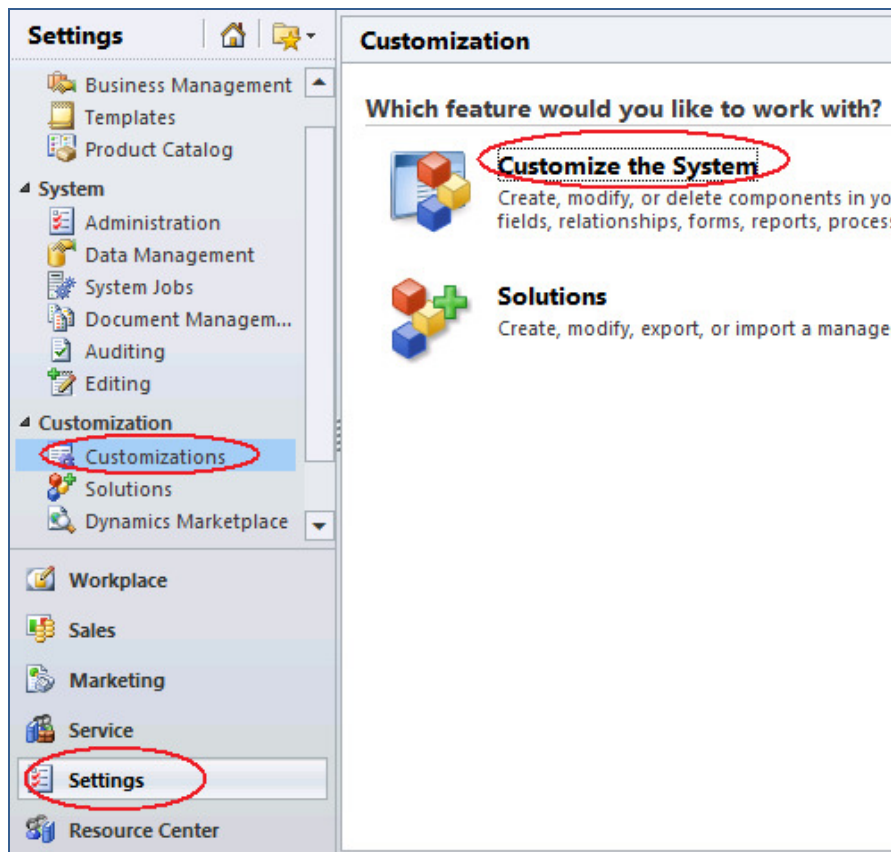


Figure No 7. Customization Window

It opens Default Solution Window Click on **Entity**→**Quote**→**Form** as shown in Figure 8

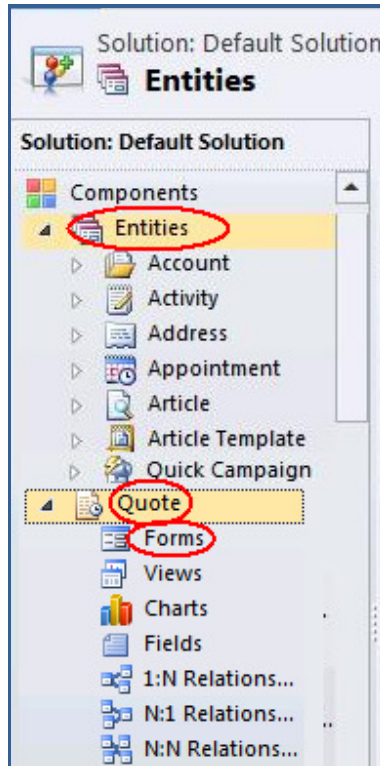


Figure No. 8 Default Solution Window

From **Form** section Click on Information as shown in Figure 9

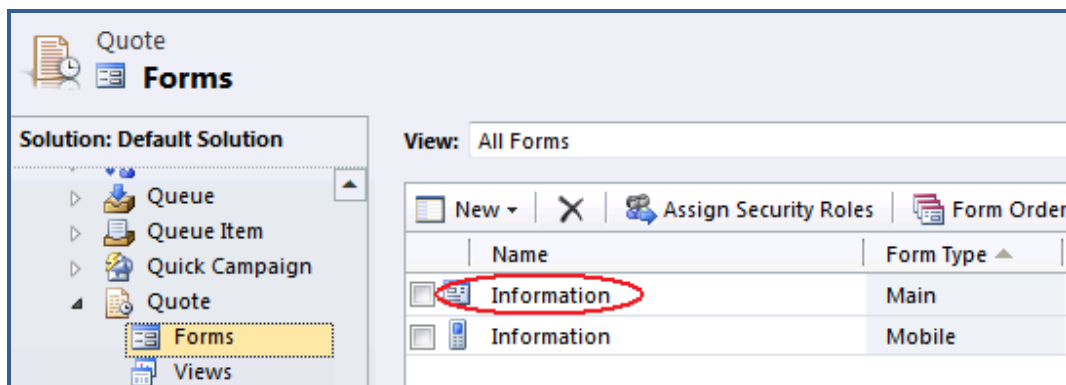


Figure No. 9 Forms Window

As you click on Information it opens a new window, click on Insert and the Web Resources from CRM Ribbon as shown in Figure 10.

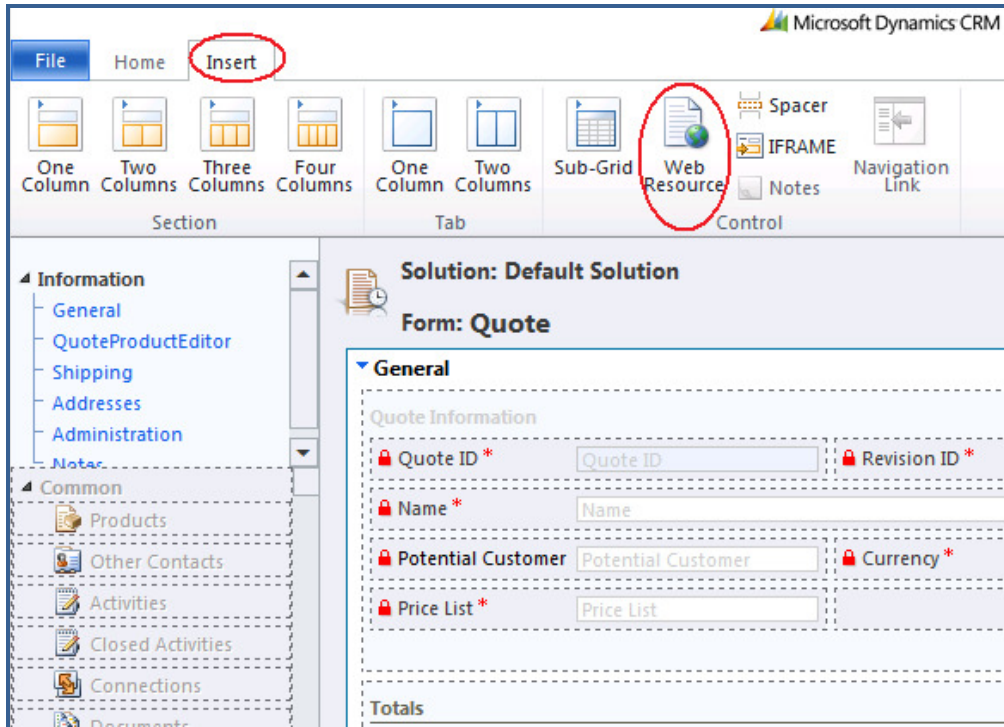
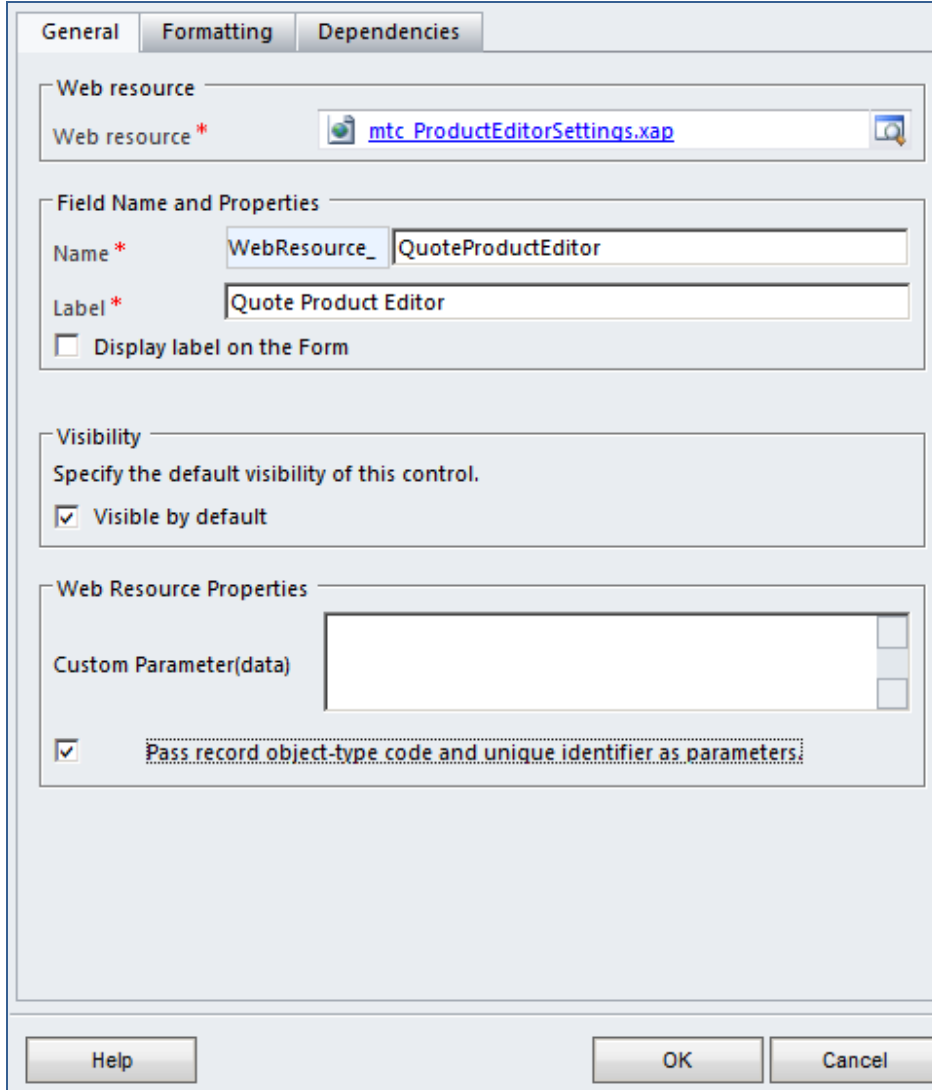


Figure No 10. Web Resource Tab

**Note:- In this manual we are using screen shots for Quote, other two Order & Invoice works in a similar way.**

To add parameters **Click on Web Resources** from CRM ribbon, it opens Web Resources Window where you can add parameters, select **Pass** check box to continue.



The screenshot shows the 'Web Resources Window' dialog box with the following configuration:

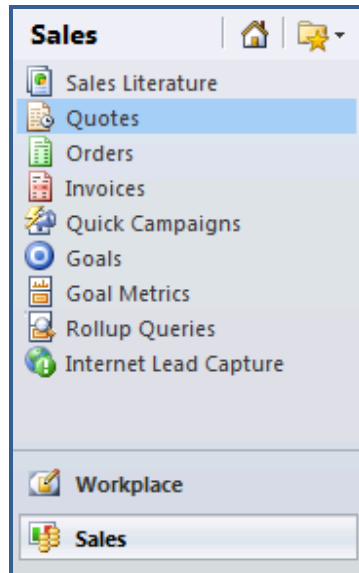
- General** tab is selected.
- Web resource**: mtc\_ProductEditorSettings.xap
- Field Name and Properties**:
  - Name \***: WebResource\_QuoteProductEditor
  - Label \***: Quote Product Editor
  - Display label on the Form
- Visibility**:
  - Specify the default visibility of this control.
  - Visible by default
- Web Resource Properties**:
  - Pass record object-type code and unique identifier as parameters

Buttons at the bottom: Help, OK, Cancel.

Figure No 11. Web Resources Window

## Using Sales Product Editor

Sales Product Editor is accessed from the left navigation pane of Microsoft Dynamics CRM, as show in Figure 12 Click on **Sales** → **Quote** (select one from **Quote, Order, and Invoice** to open desired entity.)



**Figure No 12. Access Menu**

This window allows you to use Sales Product Editor, as shown in Figure 13

Quotes: <b>My Quotes</b> ▾				
<input type="checkbox"/>	Name ▲	Status	Total Amount	Potential Customer
<input type="checkbox"/>	sa	Draft	(\$50.00)	Editing

**Figure No 13. Active Account View**

**Note:- In this manual we are using screen shots for Quote, other two Order & Invoice works in a similar way.**

## Editing Grid

You can add new product description or edit it, it saves all records in CRM as you leave the row. It also gives you field to choose from Existing Product or Write in product, all other details are also edited in this excel like grid; like freight, discount, price etc.

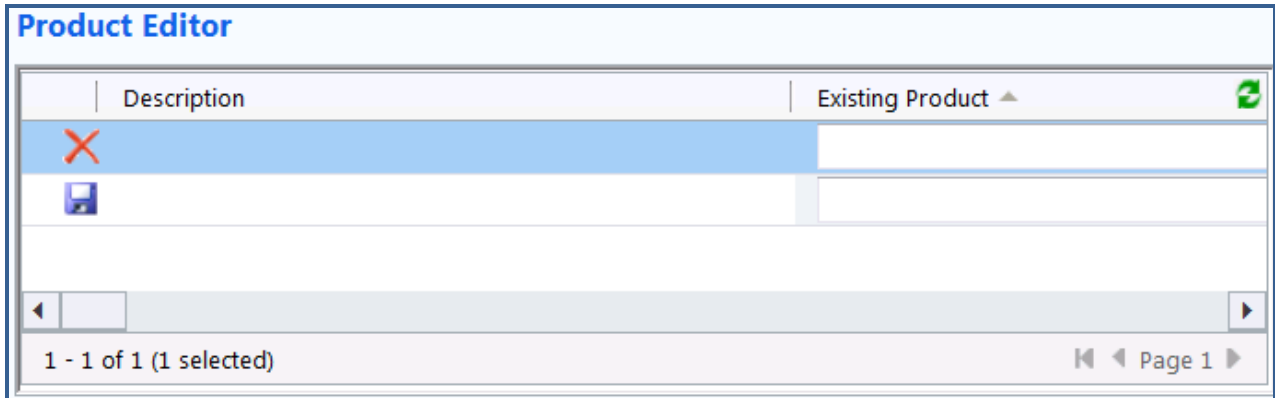


Figure No 14. Editing Grid

## Deleting Records

To delete records, select the accounts by clicking check boxes and **Click on Delete** (X Mark) as shown in Figure 15.

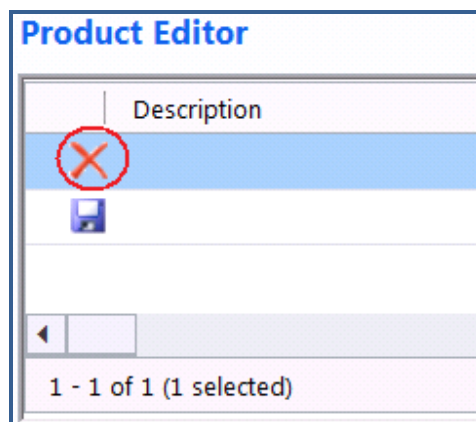
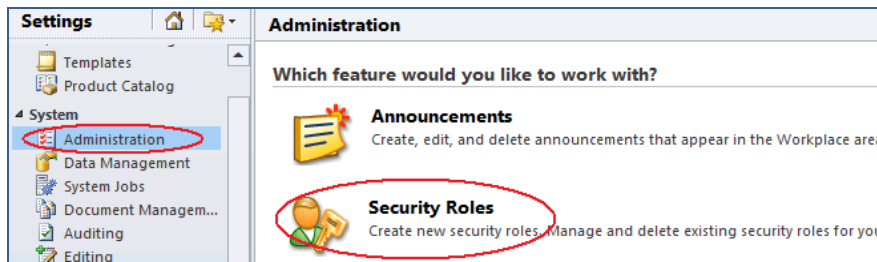


Figure No 15. Deleting Window

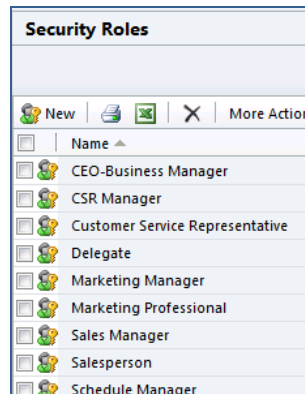
## Security Role Privileges

Security Roles are a standard function of Microsoft Dynamics CRM and Editable Grid is compliant to the privileges controlled by Security Roles. Your User's access privileges to add or "Create" records and modify or "Write" records from Editable Grid can be controlled by the Security Role functionality explained briefly here and in CRM guides and "Help". Security role privileges (A user's rights to perform specific actions on specific record types or to perform tasks. Privileges are assigned by system administrators to security roles. You can set your own guidelines for Security Roles privileges, go to **Setting** → **Administration** → **Security Roles** as shown in Figure 16



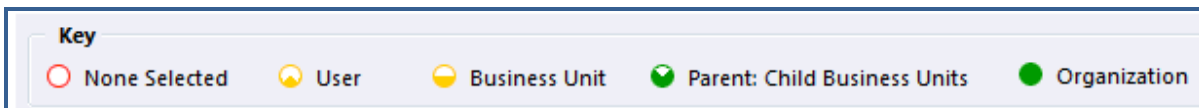
**Figure No.16 Security Setting Window**

As you click on Security Roles, different level of staff is listed in excel like grid where you can make changes as per organization guidelines as shown in Figure 17



**Figure No.17 Security Role Grid**

Click on radio button till you get the desired setting required for Security Role Privileges, there are five different levels of Security Settings as shown in Figure 18



**Figure No. 18 Key Window**

## MTC Overview

MTC develops an ever growing and extensive family of add-on products, complete solutions, and core development technologies for the Microsoft Dynamics CRM platform.



Small and medium sized businesses (SMB) can now affordably – cheaply – build the kind of enterprise automation system that distinguishes the best businesses on earth.

**SMB Custom Enterprise** is your business's exact fit for a complete low cost business-specific companywide automation solution - marketing to operations to accounting in a closed loop - built on the Microsoft Dynamics xRM platform technologies. Starting with the Microsoft CRM platform in either a monthly Online or wholly-owned on-premise implementation you choose from a large and growing set of packaged option functionality where you determine what non-standard additional functions you want on this solution, then add them.

For more information on the dozens of integrated products of the **SMB Custom Enterprises solution set** visit: [www.MTCCRM.com](http://www.MTCCRM.com)



Management Technology Consulting LLC (MTC) is dedicated exclusively to the Microsoft Dynamics CRM / xRM platform and CRM web portal technologies in the business of delivering add-on products and services.

MTC is a Microsoft Gold Certified Partner and Independent Solution Vender working on Microsoft CRM since the introduction of the platform.

MTC's product offerings include development technologies for the Dynamics CRM platform, add-on enhancements of features and major functions to CRM, as well as complete vertical-market enterprise versions of Dynamics CRM serving an every growing list of industries and organization types.



MTC's services are built on a global **24/7** rapid-response low-cost MTC is US headquartered company optimized for low-cost on-demand global engagement with regionalized contacts and a development facility in Hyderabad India adjacent to Microsoft's facility.

## The Global CRM Community [DynamicsExchange.com](http://DynamicsExchange.com)

MTC is the founding and managing partner of the Microsoft Dynamics CRM platform Community at [www.DynamicsExchange.com](http://www.DynamicsExchange.com). Dynamics Exchange is crowd-source built and dedicated to driving down the costs of implementation and enhancement of the Microsoft Dynamics CRM platform with unique and innovative social networking and knowledge resource allocation processes. Dynamics Exchange is the leading community free and open to Microsoft CRM uses and professionals for support, training, knowledge, products, and services worldwide.

MTC's low-cost and fixed-rate professional services current rate schedule: [www.MTCCRM.com/MTC\\_Services.pdf](http://www.MTCCRM.com/MTC_Services.pdf)

## Editable Grid Family of Products

Editable Grid is part of a family of related functionality that is available as individual products or as a bundled Suite product. The Editable Grid products are:



The features of each product can best be understood from features matrix below:

Features of Editable Grid Versions	Editable Grid	Add & Edit Grid	Sales Product Editor
Edits View Cells In-Place	✓	✓	✓
Works on CRM Premise and CRM Online	✓	✓	✓
Supports All CRM Field Types	✓	✓	✓
Mimics Excel for Volume Record Adds		✓	✓
Adds New Records Quickly in CRM	✓	✓	✓
Speeds Product Quoter and Order Process			✓
Add New Record to Top Line	✓		
Manipulate Product-Complex Quotes Easily			✓
Compatible with Any Standard Entity	✓	✓	
Works with Opportunity, Quote, Order, Invoice			✓
Compatible with Custom Entities	✓	✓	
Works with Multiple Views per Entity	✓		
Supports Entity Associated Views	✓	✓	
Saves as You Work Line to Line		✓	✓
Intuitive to Use	✓	✓	✓
Multiple Row and Column Editing	✓	✓	✓
All-in-One-Screen Quote Functionality			✓
Settings Control of a Single View for Any Entity		✓	✓
Settings Control for Use on Any Entity	✓	✓	
Settings Control of Entity and View		✓	
Unique Vertical Customization Available	✓	✓	

## End User License Agreement (EULA)

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2. MTC and its OEM partner(s) hereby grants End-User a non-exclusive, non-transferable right to use the Product, subject to the use restrictions and limitations set forth in Section 5 and Section 6 below.
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#### General

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Future years of Annual Maintenance must be purchased at a fee equal to 25% of the original purchase price of the product. MTC will notify owners of record by email of the Annual Maintenance renewal time and facilitate collection of fees and simultaneously assure the latest versions and updates are in use.

## Customer Care details



MTC is here to serve the growing global community of Microsoft Dynamics Software Users

### Availability and hours of operation:

**Monday to Friday**

**USA 323-851-5008 - 8:00 AM to 6:00 PM**

**India 323-863-0077 - 8:30 AM to 8:30 AM USA**



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