



## Installation Guide

# **triomis vat calculator for Dynamics CRM 2011**

Dortmund  
17.06.2011



## Content

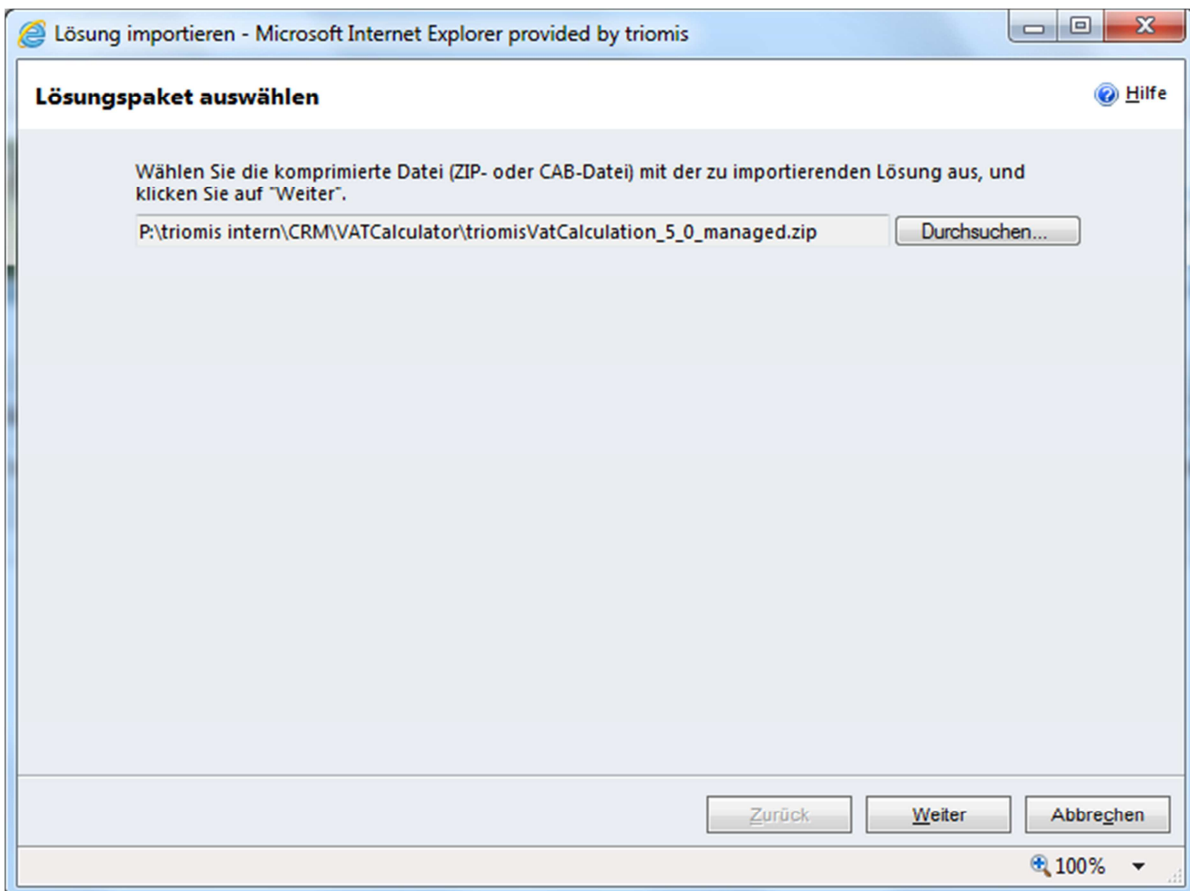
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## 1 Solution Installation

In Dynamics CRM 2011 the installation of and especially the customizing have been improved extremely, which will reduce implementation and operating costs. One of the many improvements is the managed solution.

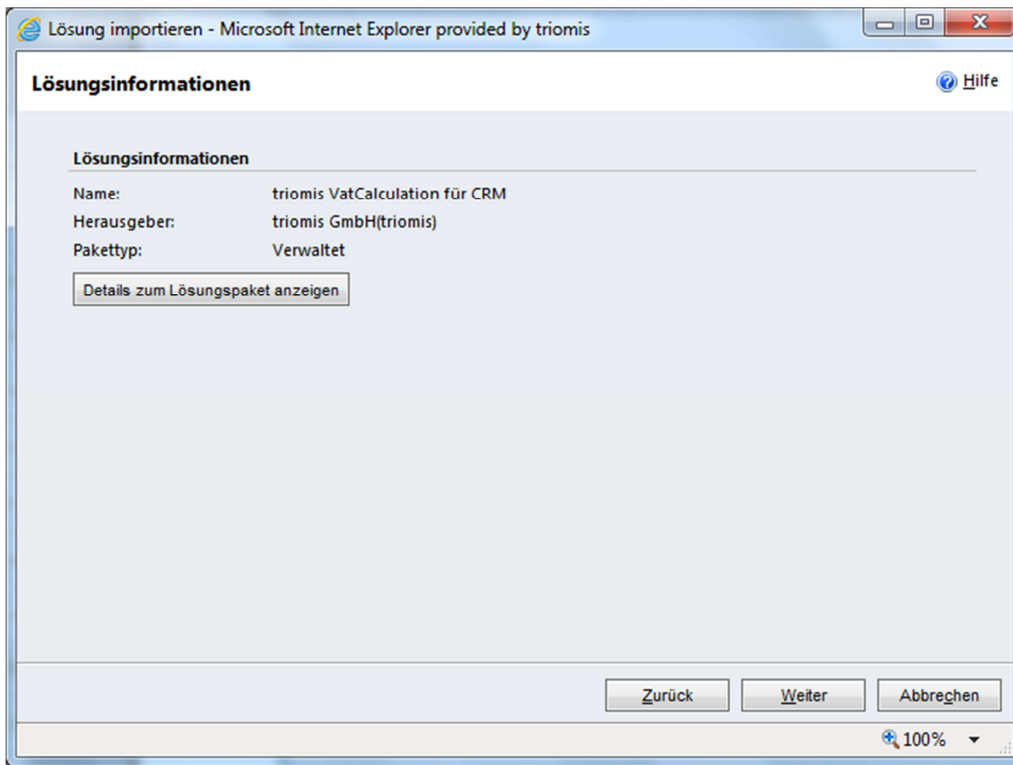
Solutions in Microsoft Dynamics CRM 2011 are a new method for saving customizations and to release the customizations for other users. You might play with a solution, can create or import a solution, which was created by a developer outside of your organization. A solution can be easily shared with other users. A managed solution can only be edited by certain users. An unmanaged solution can be edited by any user, unless he has the required user role. A solution may have a version number, entities and relationships to other components as well as security features based on user roles.

triomis vat calculator for Dynamics CRM 2011 is such a managed solution. Except for the tax rates that are managed in an options set, you have no way to change or extend the solution. To install the solution you log in as an administrator and navigate to the Settings area - Customization - Solutions. From there, click the "Import" button. The following dialog appears:

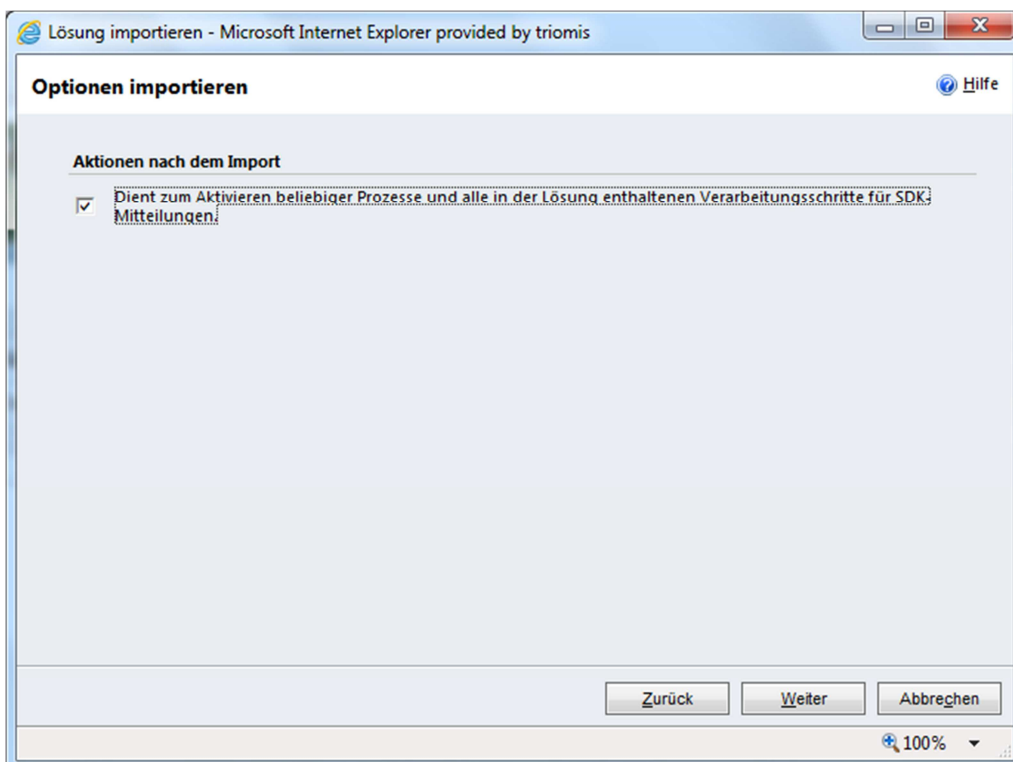


Click the "Browse" button and choose the solution package for the triomis vat calculator. Then you will see the information about the solution.

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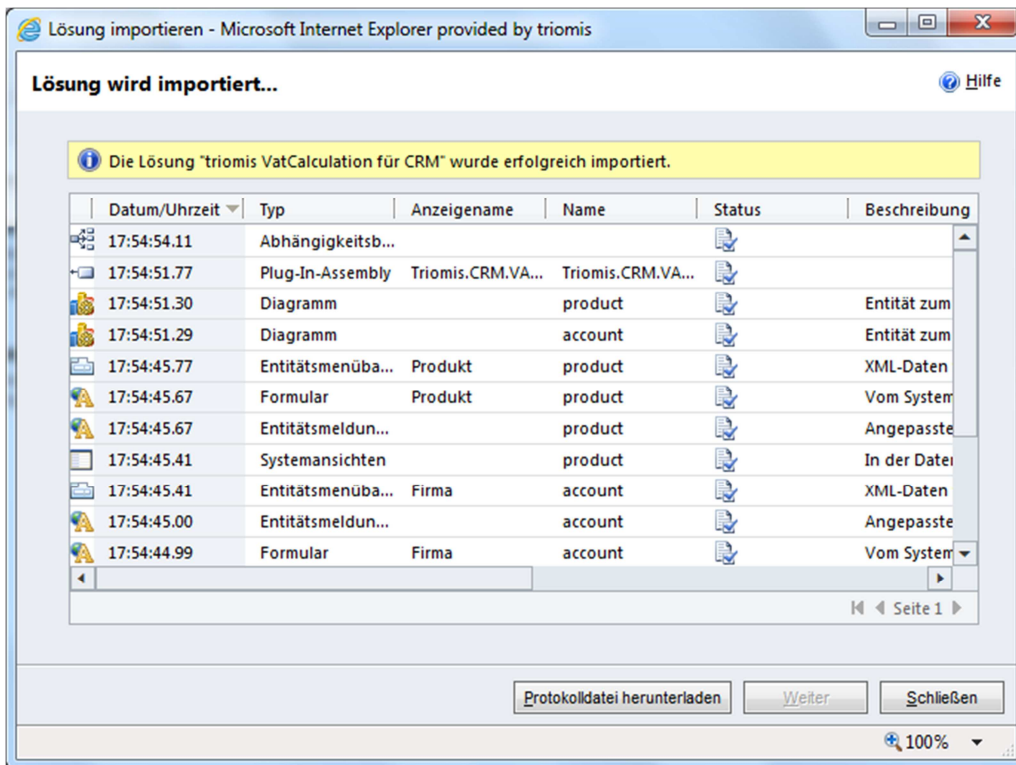


Click on "next". In the next dialog, select the check box to enable the calculation.



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After the solution has been imported, it appears in the solutions in customization area.



## 2 Activate the Solution

When registering on the triomis Web site you have your Microsoft Authorization number (10 digits) and your CRM organization name specified. These two items are required for your license key to be generated. The license key is valid only for the specified CRM organization and can't be used to activate the solution in other organizations.

### Firmenprofil

[Klicken Sie hier, um weitere Informationen zu erhalten.](#)

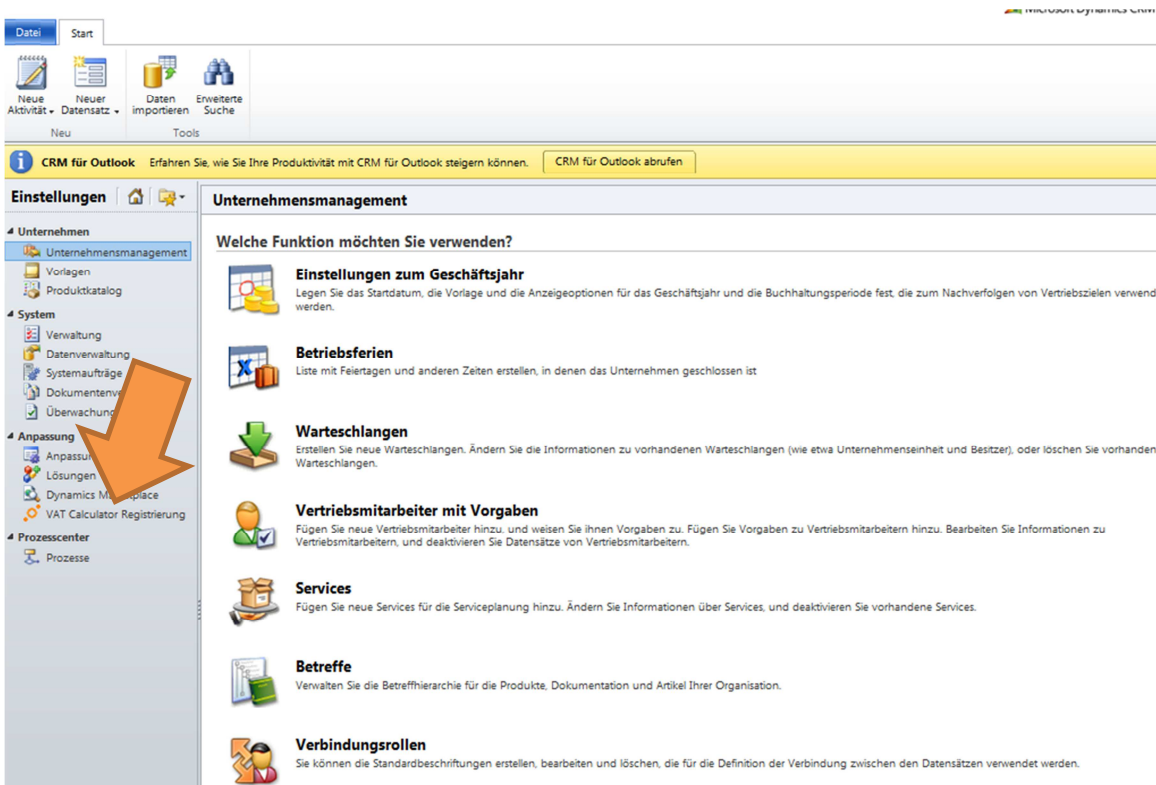
#### Accountinformation

<b>Autorisierungsnummer</b> 0105501261	<b>Kundennummer</b> 5501261	<b>Rechtskräftiger Firmenname</b> trionis GmbH
<b>Profiltyp</b> Kunde	<b>Gruppentyp</b> Live	<b>Eingetragener Firmenname</b> trionis GmbH

Open the dialog for activating the solution:

[http://IhrCRM/WebResources/trionis\\_/VatCalculatorRegistration.html](http://IhrCRM/WebResources/trionis_/VatCalculatorRegistration.html)  
[https://IhrCRM/WebResources/trionis\\_/VatCalculatorRegistration.html](https://IhrCRM/WebResources/trionis_/VatCalculatorRegistration.html)

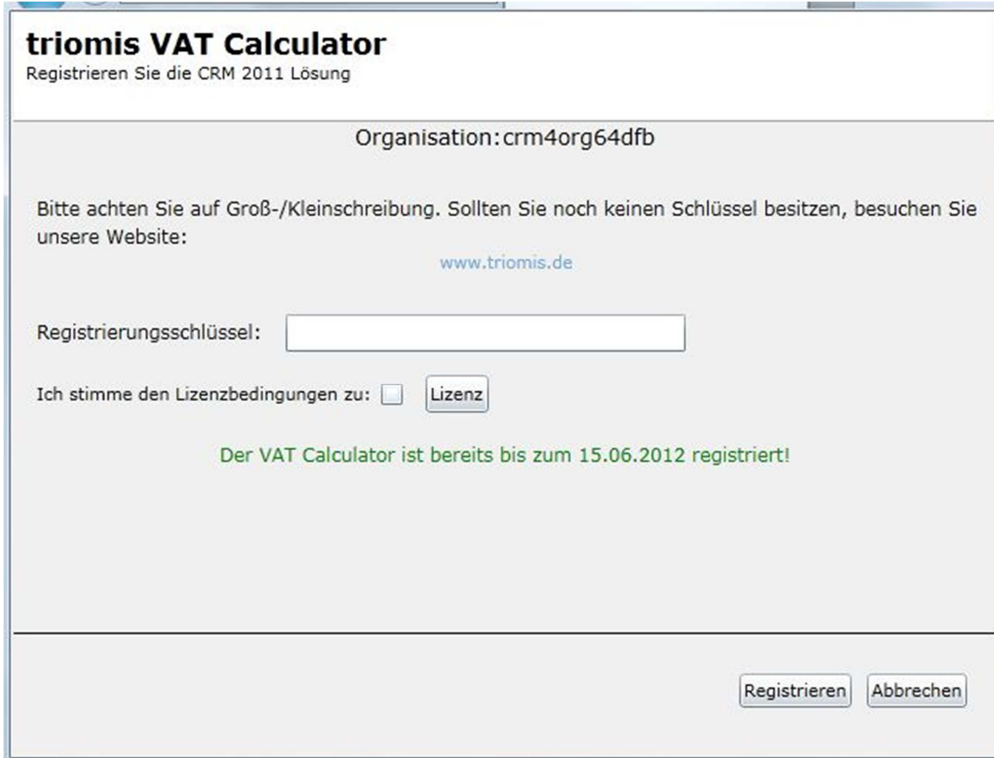
Alternatively, you can use the Link „VAT Calculator Registrierung“ from Settings left site navigation.



The screenshot shows the CRM software interface. On the left, there is a navigation menu with the following items: **Einstellungen** (Settings), **Unternehmen** (Company), **System**, **Anpassung** (Customization), and **Prozesscenter** (Process Center). Under **Anpassung**, the option **VAT Calculator Registrierung** is highlighted with an orange arrow. The main content area shows the **Unternehmensmanagement** (Company Management) section, which includes a list of functions to be used, such as **Einstellungen zum Geschäftsjahr**, **Betriebsferien**, **Warteschlangen**, **Vertriebsmitarbeiter mit Vorgaben**, **Services**, **Betreffe**, and **Verbindungsrollen**.

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The following dialog appears:



**triomis VAT Calculator**  
Registrieren Sie die CRM 2011 Lösung

Organisation: crm4org64dfb

Bitte achten Sie auf Groß-/Kleinschreibung. Sollten Sie noch keinen Schlüssel besitzen, besuchen Sie unsere Website:  
[www.triomis.de](http://www.triomis.de)

Registrierungsschlüssel:

Ich stimme den Lizenzbedingungen zu:  **Lizenz**

Der VAT Calculator ist bereits bis zum 15.06.2012 registriert!

**Registrieren** **Abbrechen**

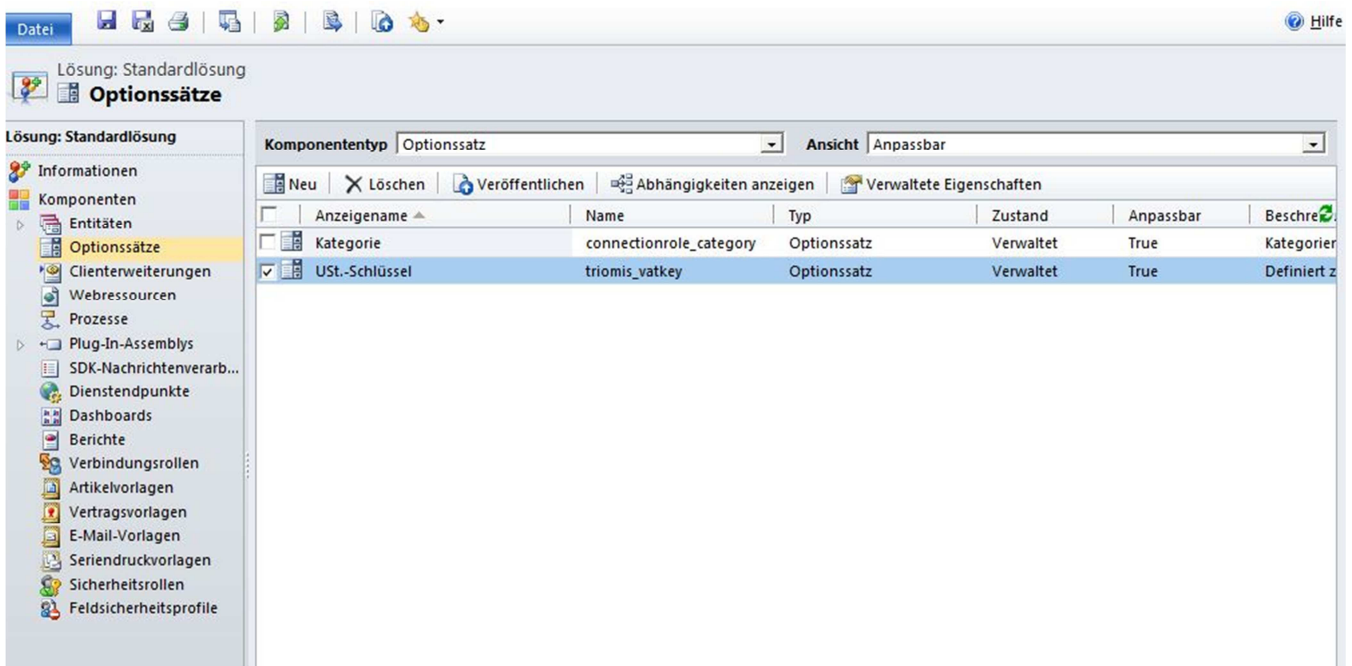
You can view the license terms by clicking the "Lizenz" button. Enter the registration key and confirm the license terms. The registration is valid for one year and must then be renewed.

## 3 Solution Configuration

The calculation of sales tax is at the item level in quotations, orders and invoices. The underlying sales tax rate is fixed for the products. What keys are available is controlled by an option set.

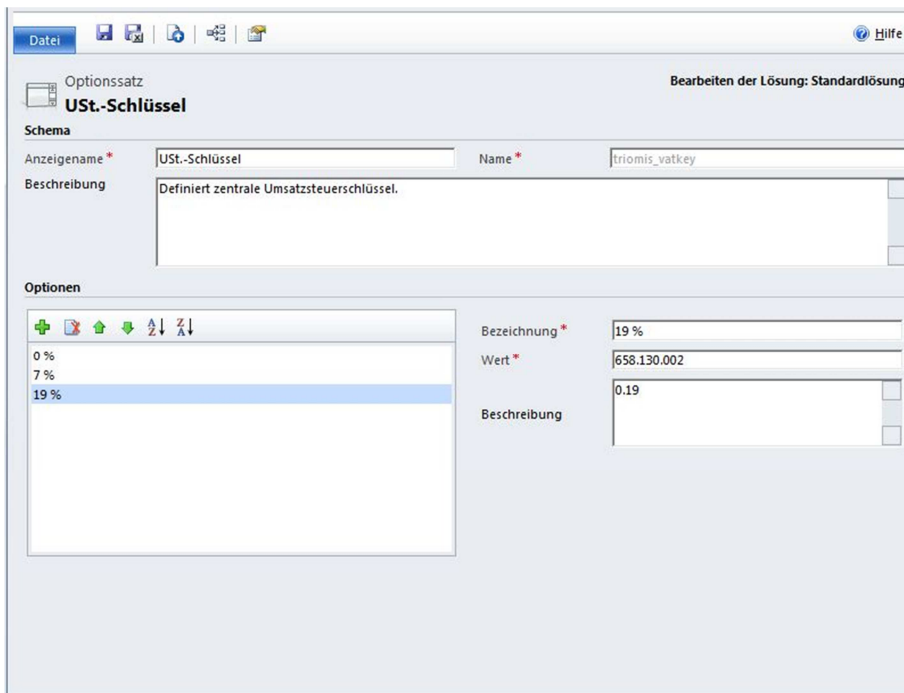
To set the tax key and values, navigate to Settings - Customization – Option Sets.

Open the Option set Tax rate (UST Schlüssel).



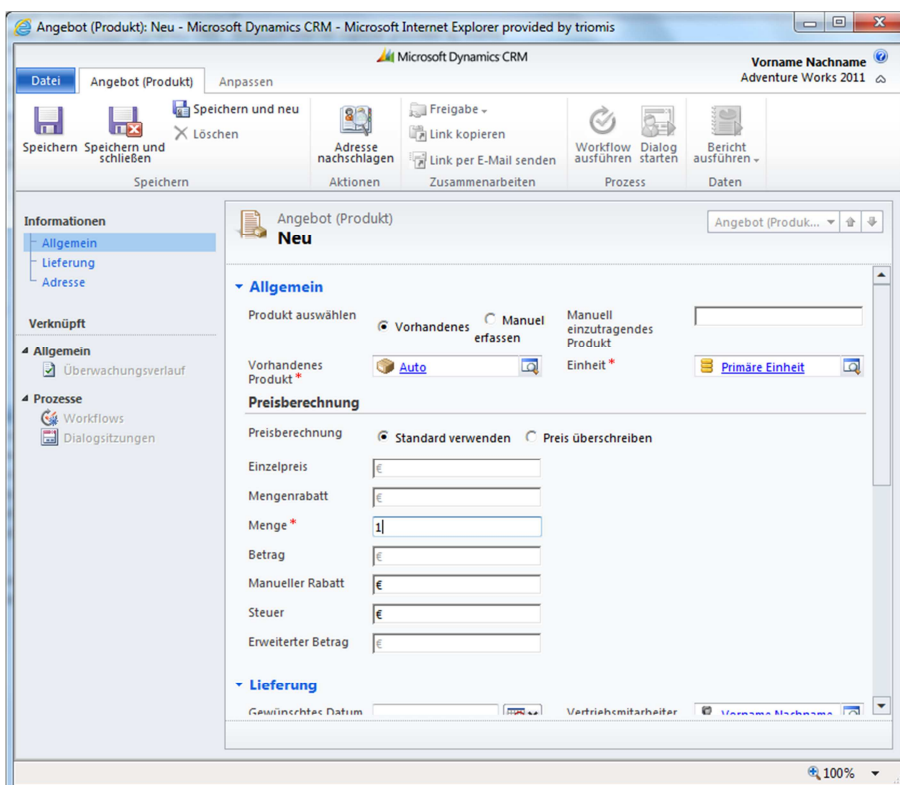
You can specify additional keys, change the display values or change the underlying percentages. The percentage is entered in the Description field. The format is mandatory. 19% can be entered, for example, as 0.19. Please don't enter a comma as decimal separator only the dot (.) is allowed.

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After the tax keys have been entered, you must assign the keys to products in order to use the right percentage for those products in quote, order and invoice details for sales tax calculation.

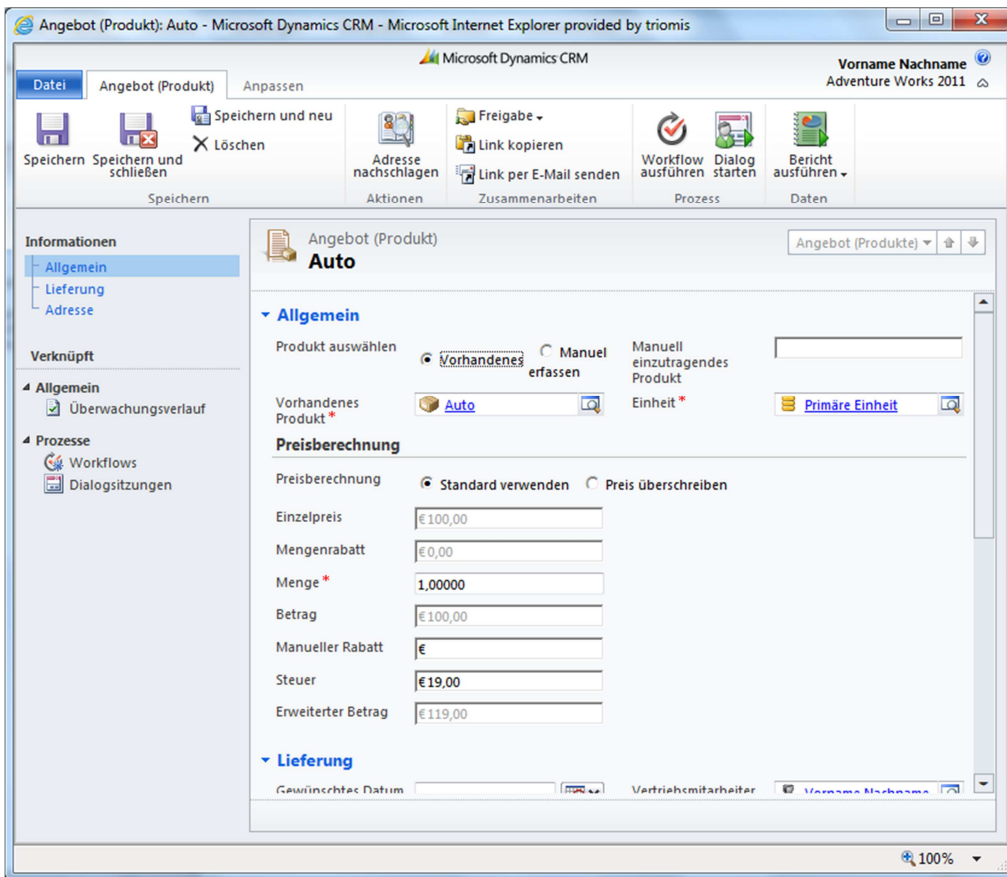
**Attention:** For write in products no sales tax can be calculated, because the tax key can't be determined from the used products.



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In the details the tax is calculated based the product tax key as soon as the data record is stored. VAT calculator takes into calculation also the specified manually discount.

**Attention:** The discount on offer, order, and invoice does not shown in cumulative tax, not even here there can be defined, which tax key should be used for this purpose.



In the account data can be determined that no tax calculation will take place. This allows EU internal business without tax (reverse tax process). For this, the check box "Tax-Exempt" (UST-befreit) is set to Yes.

