



Installation Guide

triomis vat calculator for Dynamics CRM 2015

Dortmund
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Content

1	Solution Installation	2
1.1	Prerequisites	2
1.2	Installation.....	2
2	Activate the Solution	6
3	Solution Configuration	7
3.1	Setup of VAT values	7
3.2	Setup of products	9
3.3	Automatic calculation of VAT value.....	9

1 Solution Installation

1.1 Prerequisites

CRM Online: CRM Online fulfills all prerequisites.

CRM On Premise (Server installation): You need the sandbox service installed and running on your CRM server. Ensure started sandbox by typing following command in the command line:

```
net start mscrmsandboxservice
```

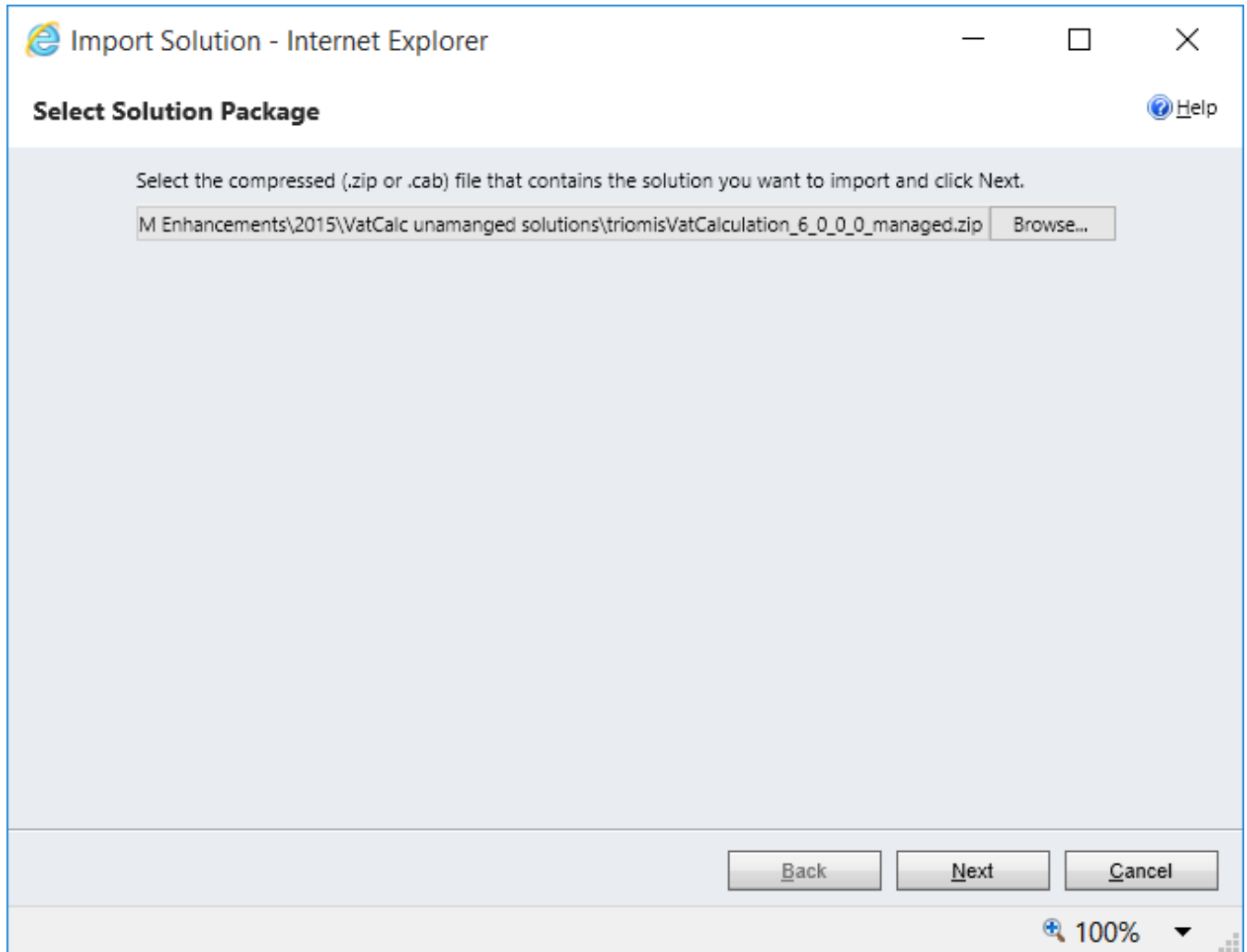
1.2 Installation

In Dynamics CRM 2015 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 2015 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.

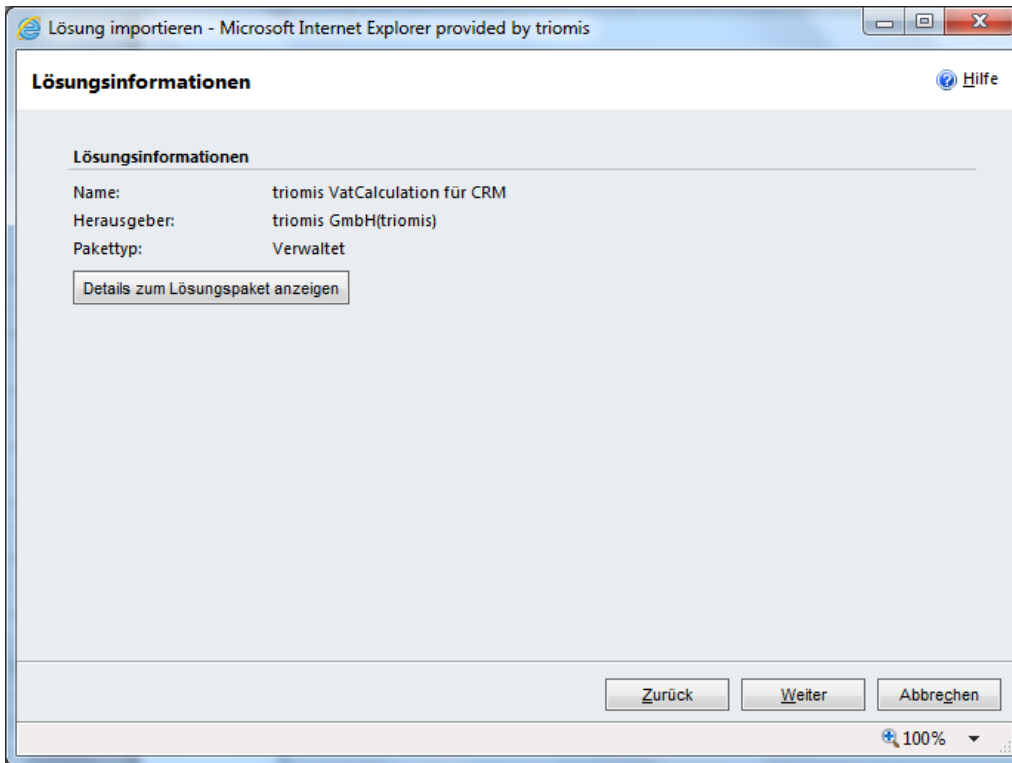
triomis vat calculator for Dynamics CRM 2015 is such a managed solution. Except for the tax rates that are managed in an options set, you have no way to change or extend the solution. To install the solution you log in as an administrator and navigate to the Settings area - Customization - Solutions. From there, click the "Import" button. The following dialog appears:

Installation Guide

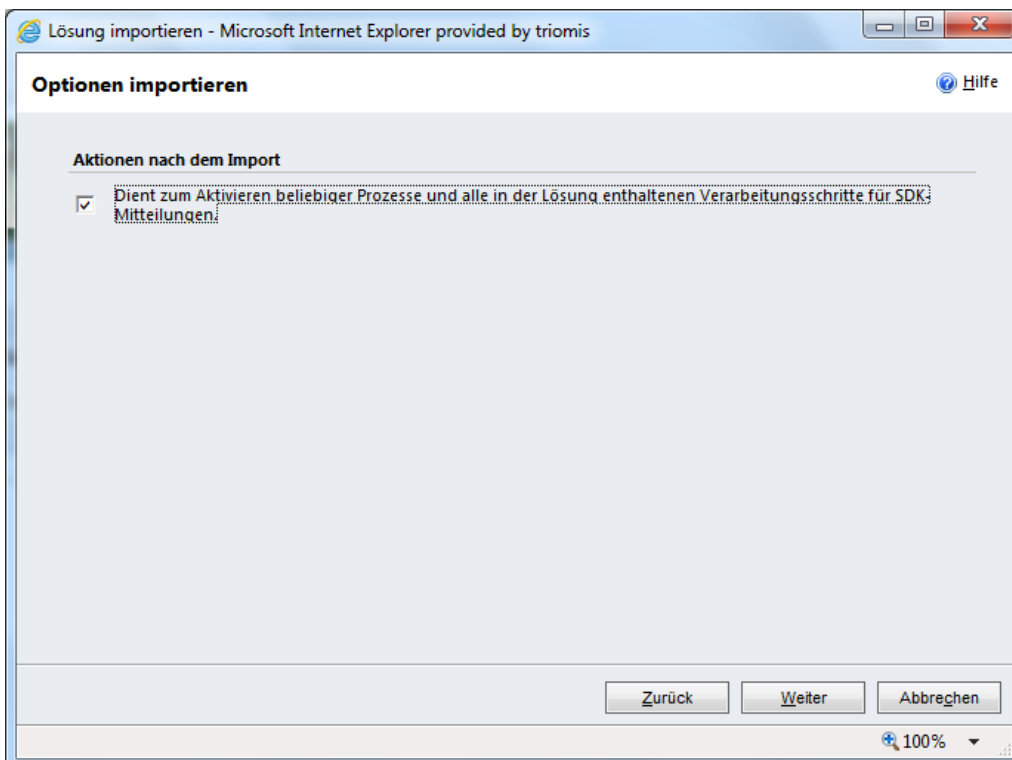


Click the "Browse" button and choose the solution package for the triomis vat calculator. Then you will see the information about the solution.

Installation Guide

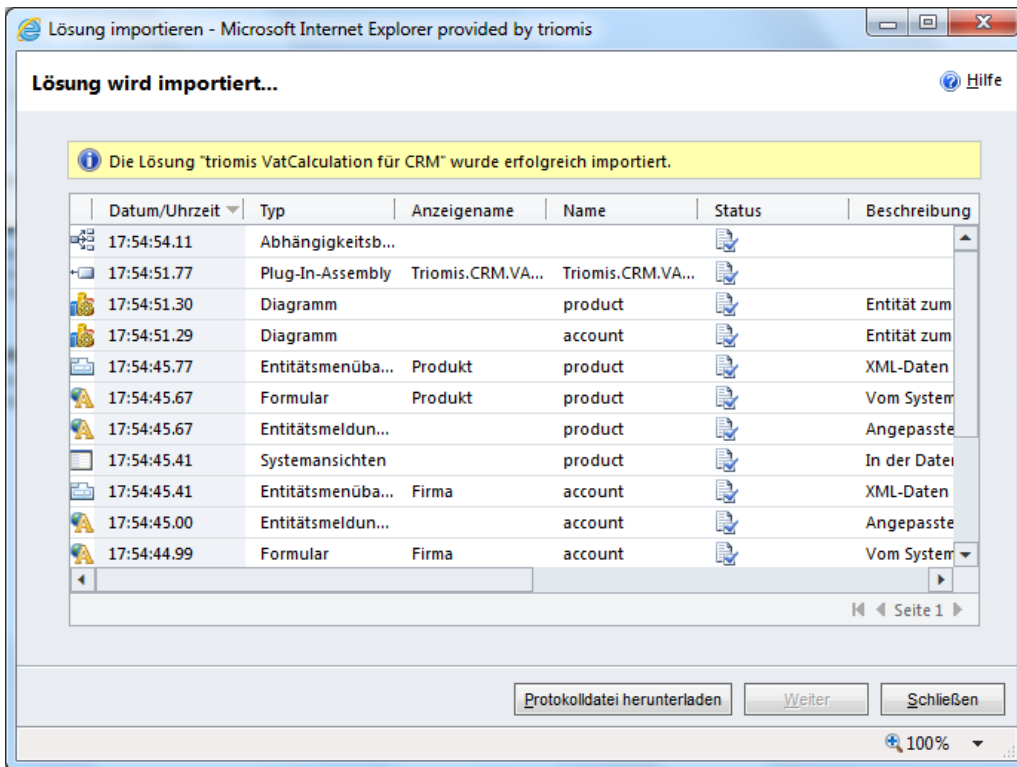


Click on "next". In the next dialog, select the check box to enable the calculation.



Installation Guide

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.

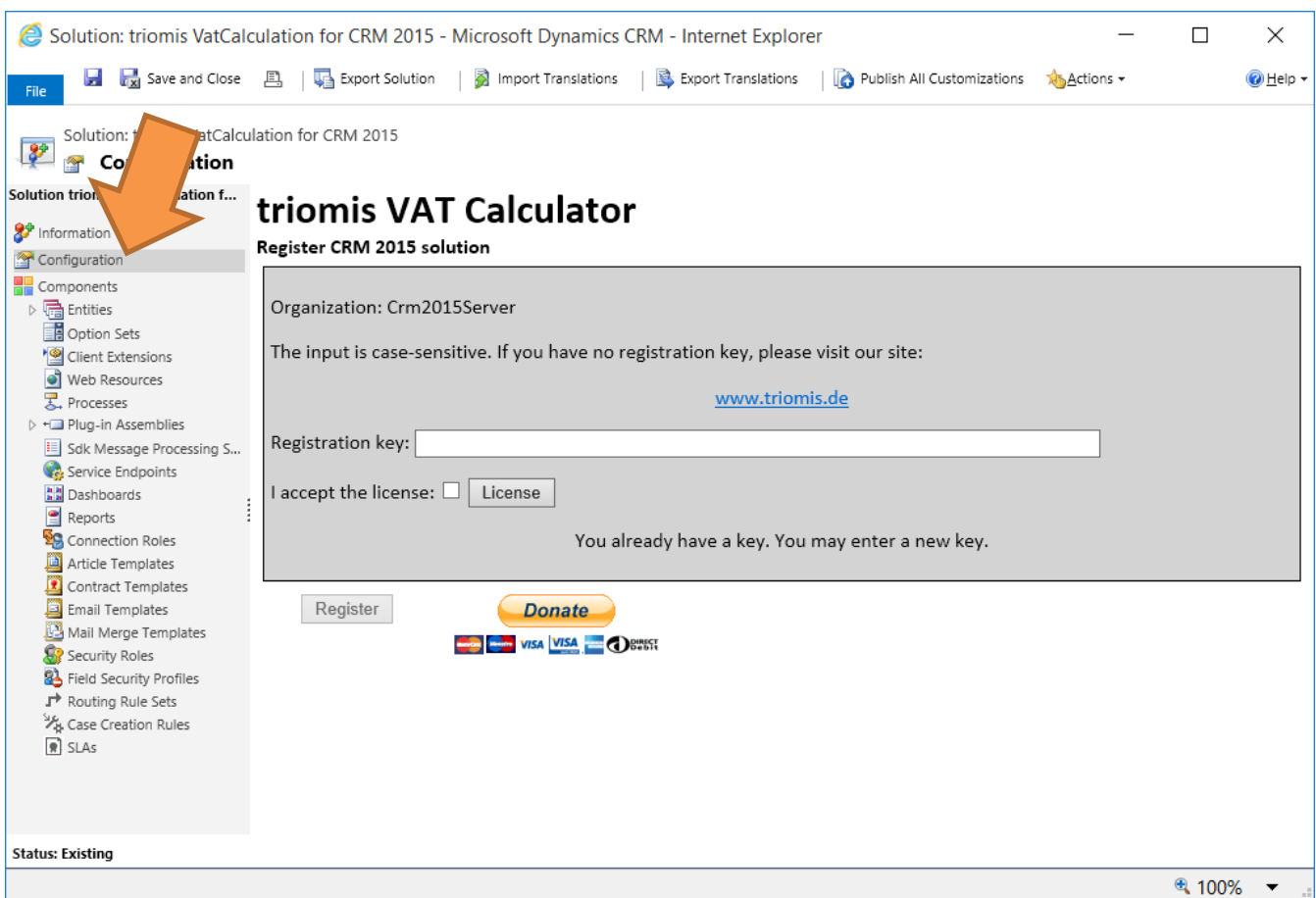
Firmenprofil

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

Accountinformation

Autorisierungsnummer 0105501261	Kundennummer 5501261	Rechtskräftiger Firmenname triomis GmbH
Profiltyp Kunde	Gruppentyp Live	Eingetragener Firmenname triomis GmbH

Open the dialog for configuration of the solution:



Solution: triomis VatCalculation for CRM 2015 - Microsoft Dynamics CRM - Internet Explorer

File | Save and Close | Export Solution | Import Translations | Export Translations | Publish All Customizations | Actions | Help

Solution: triomis VatCalculation for CRM 2015

triomis VAT Calculator

Register CRM 2015 solution

Organization: Crm2015Server

The input is case-sensitive. If you have no registration key, please visit our site:
www.triomis.de

Registration key:

I accept the license: License

You already have a key. You may enter a new key.

Register

Donate

MasterCard | American Express | VISA | VISA | DIRECT DEBIT

Status: Existing

100%

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.

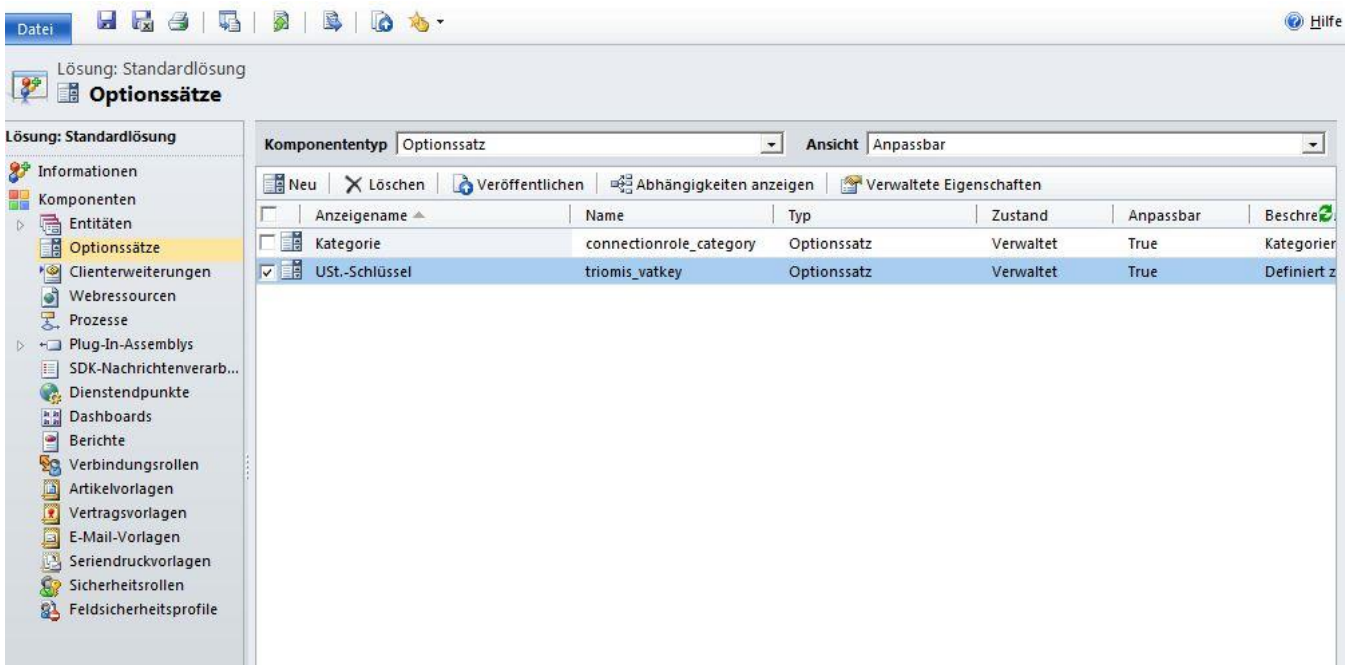
3 Solution Configuration

3.1 Setup of VAT values

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.

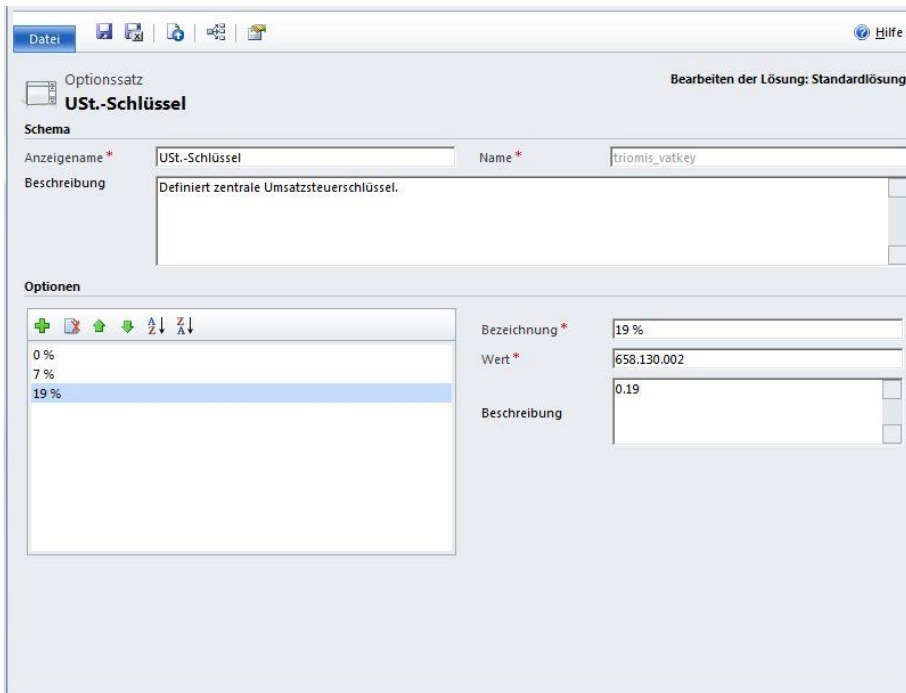
To set the tax key and values, navigate to Settings - Customization - Option Sets.

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.

Installation Guide



The screenshot shows a software window titled 'Optionssatz USt.-Schlüssel' with a menu bar containing 'Datei' and 'Hilfe'. The window is in 'Bearbeiten der Lösung: Standardlösung' mode. It is divided into several sections:

- Schema:** Contains fields for 'Anzeigename *' (USt.-Schlüssel) and 'Name *' (triomis_vatkey). A 'Beschreibung' field contains the text 'Definiert zentrale Umsatzsteuerschlüssel.'
- Optionen:** A list box on the left shows three options: '0 %', '7 %', and '19 %', with '19 %' selected. To the right of the list box are three input fields: 'Bezeichnung *' (19 %), 'Wert *' (658.130.002), and 'Beschreibung' (0.19).

3.2 Setup of products

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.

You need to assign the percentages of all existing products, or you will get an error message when adding a product detail to e.g. an invoice.

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



SUMMARY

Name *	Bratpfanne	Unit Group *	Default Unit
Product ID *	1	Default Unit *	Primary Unit
Family Hierarchy	--	Default Price List +	DefaultPriceList
Valid From	--	Decimals Supported *	2
Valid To	--	Subject	--
Description	--	VAT percentage *	19 %

3.3 Automatic calculation of VAT value

ORDER
Möglicher Verkauf

Summary

Order ID *	ORD-01000-T7K3Z7
Name *	Möglicher Verkauf
Currency *	Euro
Price List *	DefaultPriceList
Prices Locked *	Yes

PRODUCTS

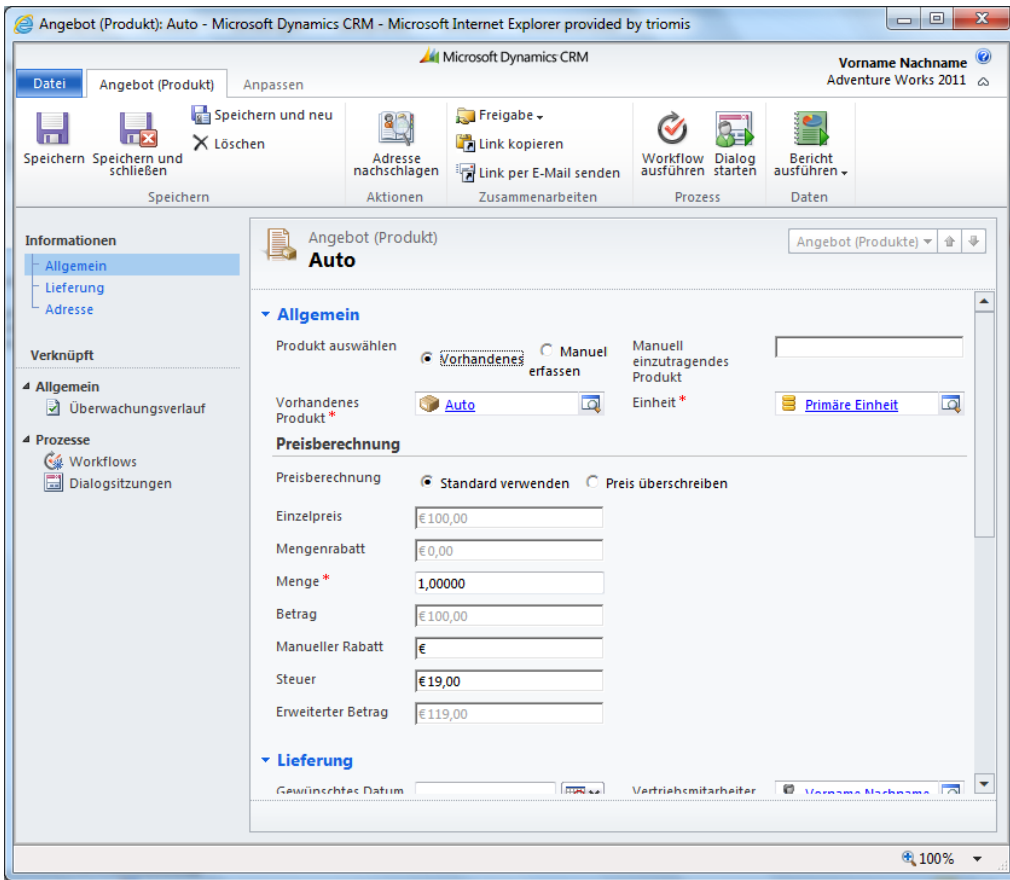
Product Name	Properties	Unit	Price Per Unit	Quantity	Discount	Extended Amount	Suggestions
Bratpfanne		Primary Unit	€100.00	2.00000	€0.00	€238.00	Suggestions

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 is not used to calculate the cumulative tax. Set a manual discount on the product level to discount the tax value of the product.

This is due to the possibility of different VAT percentages on the products. E.g. 7% on books and 19% on service products.

Installation Guide



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.



Entitlement Name ↑
No Entitlement records fo

Details

COMPANY PROFILE

Industry --
SIC Code --
Ownership --

Description

--

MARKETING

Originating Lead --
Last Campaign Date --
Marketing Materials Send

CONTACT PREFERENCES

Contact Method Any
Email Allow
Bulk Email Allow
Phone Allow
Fax Allow
Mail Allow

BILLING

Currency Euro
Credit Limit --
Credit Hold No
VAT exempt* No

SHIPPING

Shipping Method --
Freight Terms --

CHILD ACCOUNTS