



Doc Templates 365 User Manual
Microsoft Dynamics 365 Business Central

Roby Rasulo Ambrosiano

Microsys Srl

March 2020



Rif.: DocTemplates365-v15EN-UserManual.docx

Summary

Introduction	3
Document Purpose	3
General information and Activation Key request	4
Doc Templates setup	5
Using the report	7



Rif.: DocTemplates365-v15EN-UserManual.docx

Introduction

The **Doc Templates 365** App has the purpose of provide a uniform layout for all customer and vendor facing documents, including quotes, orders, shipments, invoices, and the like.

Document Purpose

This document purpose is to explain how to setup **Doc Templates 365** App in order to set up the templates as default report for intended purposes.



Rif.: DocTemplates365-v15EN-UserManual.docx

General information and Activation Key request



Installed

Doc Templates 365

v. 3.0.0.1

This is the app as you can see it in the extension list. You have to install the **Framework 365** Microsys app in order to install it.

The first thing to do is to activate the solution. To do that go to "Microsys Extension List", you will see something like:

Extension Name	Extension Module ↑	Machine Code
Doc Templates 365	:	58285EDFFF938FA120195CC09E288F4A

Click on "Get Activation key..." and a message will be prompted with the information required by Microsys to activate your solution:




Send the following message to Microsys via e-mail at commerciale@msys.it

Company Name : CRONUS IT
Heading : CRONUS IT
Phone No. : +39-02-660-6666
Email :

Extension;Module;MachineCode
Doc Templates 365;;58285EDFFF938FA120195CC09E288F4A

When you receive from Microsys the Activation Key, insert it in the "Activation Key" field and you will be notified regarding the right activation of the solution and the due date:

 The solution is now active until 31/12/20

OK

Doc Templates setup

In order to proceed with the setup, go to assisted setup and search for "MSYS – Doc Templates 365" section and click on the only entry available.

Set up email logging	<input type="checkbox"/>	–
Set up a customer approval workflow	<input type="checkbox"/>	–
MSYS - Doc Templates 365	<input type="checkbox"/>	–
Doc Templates 365	<input type="checkbox"/>	–

The setup is divided in pages, one for each business area: Sales, Service, Purchase and Transport.

On each page you will have the possibility to enable the report for the specific purpose, as following:

DOC TEMPLATES 365 SETUP



SALES DOCUMENTS

Enable Microsys template for sales documents

Sales Quote

Sales Order

Sales Return Order

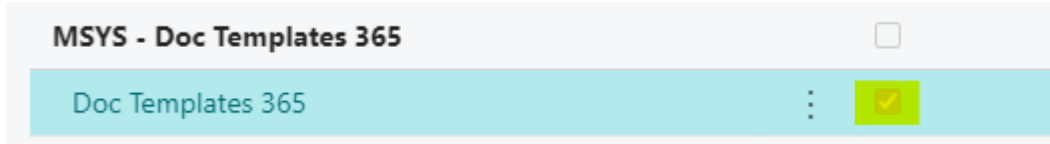
Sales Proforma Invoice

Sales Invoice



Rif.: DocTemplates365-v15EN-UserManual.docx

When the setup is completed you will see the check aside the Assisted Setup record:



The selections you have done generated some changes on Report Selection: if you have checked the section, the related setup has the "MSYS DOC Template" as report Id

REPORT SELECTION - SALES | WORK DATE: 01/04/2020 ✓ SAVED [🔖](#) [📄](#) [↗](#)

Usage Order ▼

Manage 🔍

Sequence ↑	Report ID	Report Caption	Use for Email Body	Use for Email Attac...	Email Body Layout Description
1	70469825	MSYS DOC Template	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-

If, after that, you have unchecked the section, changing your idea, the standard is restored:

REPORT SELECTION - SALES | DATA DEL LAVORO: 01/04/2020 ✓ SALVATO [🔖](#) [📄](#) [↗](#)

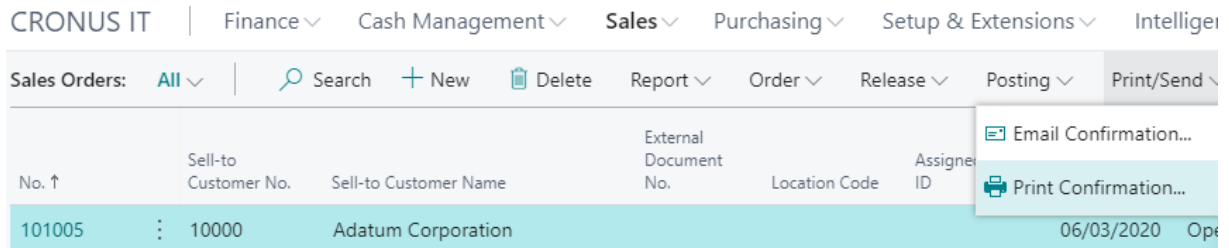
Usage Order ▼

Manage 🔍

Sequence ↑	Report ID	Report Caption	Use for Email Body	Use for Email Attac...	Email Body Layout Description
1	1305	Sales - Confirmation	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-

Using the report

When the setup is done, the template report is applied to the standard: all you have to do is print the document you are interested in



The screenshot shows the Microsoft Dynamics CRM interface. At the top, there is a navigation bar with tabs for 'CRONUS IT', 'Finance', 'Cash Management', 'Sales', 'Purchasing', 'Setup & Extensions', and 'Intelligence'. Below this is a sub-navigation bar for 'Sales Orders' with options like 'All', 'Search', 'New', 'Delete', 'Report', 'Order', 'Release', 'Posting', and 'Print/Send'. A table below displays a sales order record with columns: 'No. ↑', 'Sell-to Customer No.', 'Sell-to Customer Name', 'External Document No.', 'Location Code', 'Assigned ID', and 'Date'. The record shown is: '101005', '10000', 'Adatum Corporation', '06/03/2020', and 'Open'. A context menu is open over the record, showing options: 'Email Confirmation...' and 'Print Confirmation...'.

What you will see is a plain request page, with only a check that allows you to change the report caption to "Proforma Invoice"



The screenshot shows a page titled 'MSYS DOC TEMPLATE'. Below the title, there is a section labeled 'Proforma' with a horizontal line underneath. Below this line, there is a toggle switch labeled 'Print proforma invoice' which is currently turned off.




Four buttons are displayed in a row: 'Send to...', 'Print', 'Preview', and 'Cancel'.



Rif.: DocTemplates365-v15EN-UserManual.docx

Finally, you can get the result of the preview or print

 <p>CRONUS IT Capitale Sociale 0 completamente versato Sede Piazza Duomo, 1 - 20100 Milano (C) Tel: +39-02-660-6666 - Fax +39-02-660- Nr. Regist. - REA nr. P.I. 280519772004 - C.F.</p>	<p>Ordine Vendita 1/1</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;">Ordine Nr. 101005</td> <td style="width: 33%;">Ordine Data 06/03/2020</td> <td style="width: 33%;">Cliente 10000</td> </tr> <tr> <td colspan="2">Resa</td> <td>Agente GC_Gabriele</td> </tr> <tr> <td colspan="3">Condizioni Pagamento 1 mese sconto cassa 2% (8G)</td> </tr> </table>	Ordine Nr. 101005	Ordine Data 06/03/2020	Cliente 10000	Resa		Agente GC_Gabriele	Condizioni Pagamento 1 mese sconto cassa 2% (8G)											
Ordine Nr. 101005	Ordine Data 06/03/2020	Cliente 10000																	
Resa		Agente GC_Gabriele																	
Condizioni Pagamento 1 mese sconto cassa 2% (8G)																			
<p style="text-align: center;">Vendere a</p> <p>Adatum Corporation P.I. 789456278 Adatum Corporation Station Road, 21 16100 Genova Italia</p>	<p style="text-align: center;">Consegnare a</p> <p>Adatum Corporation P.I. 789456278 Adatum Corporation Andrea Ricci Station Road, 21 16100 Genova Italia</p>																		
<p>World Wide Bank IT2451234522224222344322223</p>																			
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">CODICE</th> <th style="width: 45%;">DESCRIZIONE MERCE</th> <th style="width: 5%;">UM</th> <th style="width: 5%;">QTA</th> <th style="width: 10%;">PREZZO</th> <th style="width: 5%;">ISC</th> <th style="width: 10%;">IMPORTO</th> <th style="width: 5%;">COD. IVA</th> <th style="width: 10%;">DATA CONS.</th> </tr> </thead> <tbody> <tr> <td>1996-s</td> <td>LAVAGNA ATLANTA, base Ref. OPEN</td> <td>PZ</td> <td>12</td> <td>1404,3</td> <td></td> <td>16851,60</td> <td>STANDARD</td> <td>03/04/2020</td> </tr> </tbody> </table>		CODICE	DESCRIZIONE MERCE	UM	QTA	PREZZO	ISC	IMPORTO	COD. IVA	DATA CONS.	1996-s	LAVAGNA ATLANTA, base Ref. OPEN	PZ	12	1404,3		16851,60	STANDARD	03/04/2020
CODICE	DESCRIZIONE MERCE	UM	QTA	PREZZO	ISC	IMPORTO	COD. IVA	DATA CONS.											
1996-s	LAVAGNA ATLANTA, base Ref. OPEN	PZ	12	1404,3		16851,60	STANDARD	03/04/2020											
<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">Cod. IVA</th> <th style="width: 15%;">Descr. IVA</th> <th style="width: 10%;">%IVA</th> <th style="width: 15%;">Imponibile</th> <th style="width: 15%;">Importo IVA</th> <th style="width: 30%;"></th> </tr> </thead> <tbody> <tr> <td>STANDARD</td> <td>IVA 20%</td> <td>20</td> <td>16.851,60</td> <td>3.370,32</td> <td></td> </tr> </tbody> </table>		Cod. IVA	Descr. IVA	%IVA	Imponibile	Importo IVA		STANDARD	IVA 20%	20	16.851,60	3.370,32							
Cod. IVA	Descr. IVA	%IVA	Imponibile	Importo IVA															
STANDARD	IVA 20%	20	16.851,60	3.370,32															
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 70%;">Tot IVA Escl.</td> <td style="text-align: right;">16.851,60</td> </tr> <tr> <td>Importo IVA</td> <td style="text-align: right;">3.370,32</td> </tr> <tr> <td>Tot IVA Incl.</td> <td style="text-align: right;">20.221,92</td> </tr> </table>		Tot IVA Escl.	16.851,60	Importo IVA	3.370,32	Tot IVA Incl.	20.221,92												
Tot IVA Escl.	16.851,60																		
Importo IVA	3.370,32																		
Tot IVA Incl.	20.221,92																		