

Introducing

Inno | Solutions Dynamics 365 Advanced Sales S/C 2022 for small companies

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This document is introducing a specific market solution from an end-user perspective based on Microsoft Dynamics 365 Sales Professional designed and developed by Inno | Solutions, Inh. Alexander Nassl. The document cannot be used as administration guide, functional guide, technical guide, implementation guide, solution guide or manual. It contains examples to show functionality and features of this specific market solution. Due to different Dynamics 365 versions, features can differ slightly in regards to this document.



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I. Introduction

This document introduces Inno | Solutions Dynamics 365 Advanced Sales for small companies as Pilot 1 version (1.1.1.0001) from an end-user view based on Microsoft Dynamics 365 Sales Professional licenses which include Sales functionality, Service functionality and Financial functionality especially for small companies selling services and products. The target market are freelancers, self-employed persons or small companies without accounting purposes whereases the company itself or the Tax Advisor of the company will do the communication and regulation within the local Tax Department and Government. Companies with accounting purposes are recommended to use the Microsoft Dynamics 365 Business Central solution, Finance and Operations Apps solution, fitting Microsoft Industry solutions or other Microsoft solutions due to its <u>specific</u> requirements.

This application is mainly built to reduce the Sales, Service and Financial administrative expenditure to let the running company focus on its offered services itself not spending too much time on the internal business process design and to evaluate better decisions within the used data. It is built for companies with only one or a few end-users who work within this solution. Due to a highly flexible handling of the software the company can do financial evaluation as needed (no regulated companies). Auditing is possible anyway. The implementation contains two different types as non-automated or full-automated. By choosing the full-automated type, different functions and features will have an automated data entry instead of manual data entries.

Mainly, the following end-to-end processes are covered by this solution:

- ✓ Lead to Order
- ✓ Order to Cash
- ✓ Procure to Pay
- ✓ Issue to Resolution
- ✓ Record to Report

To get more information about the functional handling of these end-to-end processes it is recommended to use existing learning material (books, e-learning...). To maintain business needs of small companies the end-to-end processes in this solution are slimmed down to meet the objectives by using this application.

Moreover, the following sub-processes are covered by this solution:

- ✓ Bank and Cash Management
- ✓ Cash Flow Forecast
- ✓ Profit and Loss Calculation
- ✓ Account Management
- ✓ Contact Management
- ✓ Lead Management
- ✓ Opportunity Management
- ✓ Contract Management
- ✓ Quota Management
- ✓ Order Management
- ✓ Sales Invoice Management
- ✓ Purchase Invoice Management
- ✓ Credit Note Management



- ✓ Collection Management
- ✓ Case Management /Ticketing
- ✓ Product Management
- ✓ Document Management
- ✓ Activities Management

As mentioned above the solution does not book vouchers and does not support similar accounting functionality.

To get more information about the functional handling of these sub-processes it is recommended to use existing learning material (books, e-learning...). To maintain business needs of small companies the sub-processes in this solution are slimmed down to meet the objectives by using this application.

The solution mainly contains extensions in form of configurations without touching Dynamics 365 default functionalities except a few changes. The solution is reduced and/or extended to the Dynamics 365 by design processes and can be upgraded with higher Microsoft Dynamics licenses which is not foreseen. More information about Microsoft Dynamics 365 is available e.g., at https://www.microsoft.com or https://www.microsoft.com"/>https://www.microsoft



Figure 1: Inno | Solutions Dynamics 365 Advanced Sales S/C 2022 for small companies User Interface by opening the software

The overall tool to manage a business within this software solution are dashboards to get actual and complete insights into the most relevant business areas. The control therefore is handled through Dashboards (or "Business Reports") which are the output of the data entrance. The following dashboards are included in this solution:

✓ Sales Process Analysis Dashboard



- ✓ Sales Analysis Dashboard
- ✓ Revision Analysis Dashboard
- ✓ Revenue Analysis Dashboard
- ✓ Profit Analysis Dashboard
- ✓ Expense Analysis Dashboard
- ✓ Cash Flow Forecast Dashboard
- ✓ Bank and Cash Balance Dashboard
- ✓ Data Quality Assurance Dashboard

As the reports are mainly filled with data from a manual data entry it is mandatory to have actual data in the software solution what leads to a recommended regular data entry by interval (e.g. daily). The following high-level business process structure is primarily used for the different data entries (if one step fails it will be handled as "canceled"):



Figure 2: Inno | Solutions Advanced Sales S/C 2022 High-Level Business Processes

Whatever, each process can be handled standalone, too, to meet individual business needs.

This solution is not available as managed solution to install, neither as unmanaged solution to install. It will therefore be implemented and trained through Inno | Solutions, Inh. Alexander Nassl during a defined time range. The Microsoft Dynamics licenses are presupposed and not included in this solution. More information about rates and prices or Dynamics 365 Consulting are available at: www.inno-solutions.de or by inquiry to <u>anassl@inno-solutions.info</u>. Rates and Prices for the Microsoft Dynamics 365 licenses can e.g., be fetched directly from Microsoft.

II. Dashboards

As the Dashboards (or "Business Reports") are the leading tool to control the company in this solution the most common encounters are included as described in this section below. Core functionality is to analyze, model, filter, sort and break down the visuals into smaller level until a transaction is reached. Within Pre-Defined templates in the solution .xlsx and .docx files can be created automatically for further processing.

The objective is to make better decisions within the available data in the tailored Record-to-Report processes.



1) Sales Process Analysis Dashboard

The Sales Process Analysis Dashboard in this solution contains common encounters like *New Accounts By Month, Open Leads By Stage, Leads By Source, Sales Channel Evaluation, Leads By Rating, Leads Older Than 12 Month, Sales Pipeline, Sent Quotes By Today, Sent Orders By Today* and *Cases By Status* and gives therefore actual insights into the Lead-to-Order and Issue-to-Resolution processes.







Figure 4: I/S Sales Process Analysis Dashboard 2-2



Modernste Prozesse für Ihr Unternehmen! The Sales Process Analysis Dashboard lets break down to the Sales Analysis Dashboard by following the application structure and can be used standalone. Moreover, it is used to maintain Cash Flow Forecasts.

2) Sales Analysis Dashboard

The Sales Analysis Dashboard in this solution contains common information like *Open Leads*, *Open Opportunities*, *Open Activities* and *Scheduled Activities* in list form and gives therefore actual insights into the Lead-to-Order processes.



Figure 5: I/S Sales Analysis Dashboard

The Sales Analysis Dashboard lets break down to the Revision Analysis Dashboard by following the application structure and can be used standalone. Moreover, it is used to maintain Cash Flow Forecasts.

3) Revision Analysis Dashboard

The Revision Analysis Dashboard in this solution shows ongoing work encounters like *Open Service Reports, Fulfilled Service Reports, Sent Service Reports* and *Invoiced Service Reports* and gives therefore actual insights into the Order-to-Cash and Issue-to-Resolution processes.









Figure 7: I/S Revision Analysis Dashboard 2-2

The Revision Analysis Dashboard lets break down to the Revenue Analysis Dashboard by following the application structure and can be used standalone. Moreover, it is used to maintain Cash Flow Forecasts.



4) Revenue Analysis Dashboard

The Revenue Analysis Dashboard in this solution contains classic encounters like *Sales Pipeline*, *Opportunities By State*, *Estimated Revenue By Customer*, *Accounts By Actual Revenue*, *Open Positions By Today (Invoices)*, *Open Positions By Today (Credit Notes)*, *Open Positions By Today (Accumulated)*, *Overdue Invoices to Date* and *Overdue Credit Notes to Date* and gives therefore actual insights into the Order-to-Cash processes.





Figure 9: I/S Revenue Analysis Dashboard 2-3





Figure 10: I/S Revenue Analysis Dashboard 3-3

The Revenue Analysis Dashboard lets break down to the Profit Analysis Dashboard by following the application structure and can be used standalone. Moreover, it is used to maintain Cash Flow Forecasts.

5) Expense Analysis Dashboard

The Expense Analysis Dashboard in this solution gives information about business costs and investments per interval such as *Open Expenses By Today*, *Overdue Expenses To Date*, *Paid Expenses By Year*, *Paid Expenses By Month*, *Forecasted Expenses By Month* and *Forecasted Expenses By Year* and gives therefore actual insights into the Procure-to-Pay processes.



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Figure 12: I/S Expense Analysis Dashboard 2-2

The Expense Analysis Dashboard lets break down to the Profit Analysis Dashboard by following the application structure and can be used standalone. Moreover, it is used to maintain Cash Flow Forecasts.



6) Profit Analysis Dashboard

The Profit Analysis Dashboard in this solution contains information about profit & loss per customer/project like *EBITDA Per Customer*, *EBIT Per Customer*, *EBT Per Customer*, *Total Profit Per Customer* and *Total Return on Sales* and gives therefore actual insights into the profitability of the company.



Figure 13: I/S Profit Analysis Dashboard 1-2



Figure 14: I/S Profit Analysis Dashboard 2-2



Modernste Prozesse für Ihr Unternehmen! The Profit Analysis Dashboard lets break down to the Bank and Cash Balance Dashboard by following the application structure and can be used standalone. Moreover, it is used to maintain Cash Flow Forecasts.

7) Bank and Cash Balance Dashboard

The Bank and Cash Balance Dashboard in this solution includes data about actual Bank and Cash amounts in an interval. It includes encounters like *Cash Amount to Date, Bank-Amount to Date* and *Bank and Cash Amount to Date* and gives therefore information about the liquidity of the company.



Figure 15: I/S Bank and Cash Balance Dashboard

The Bank and Cash Balance Dashboard lets break down to the Cash Flow Forecast Dashboard by following the application structure and can be used standalone. Moreover, it is used to maintain Cash Flow Forecasts.

8) Cash Flow Forecast Dashboard

The Cash Flow Forecast Dashboard in this solution gives information about actual Bank and Cash Balances plus Forecasted Revenue and minus Forecasted Cost in an interval and gives therefore an outlook of one or more business scenarios in the future. It contains encounters such *Bank and Cash Amount to Date, Total Forecasted Revenue to Date, Total Forecasted Expenses to Date, Cash Flow Forecast to Date* and *Cash Flow Range By Month.*







The Cash Flow Forecast Dashboard builds up the end process such as the start process in an interval and is used standalone by following the application structure.



III. Sales

The Sales components of this solution contains Account Management, Contact Management, Lead Management, Opportunity Management, Contract Management, Quota Management and Order Management and are primarily executed as process.



Figure 18: Inno | Solutions Dynamics 365 Advanced Sales S/C 2022 High-Level Sales Processes

Each process can be handled standalone, too, to meet individual business needs. To ensure efficient or effective work performance on different tasks, this solution uses defined views. Every transaction contains relevant relationships into other tables to ensure easy and efficient or effective handling by showing, looking up or adding needed other created data entrances. By using the full-automated type defined transactions and/or field values will be created and/or filled automatically. Within Pre-Defined templates in this solution .xlsx and .docx file can be created automatically for further processing.

The objective is to reduce administrative expenditure within manual and/or automatic data entrance due to the combination of business processes in one system for the Lead-to-Order processes.

1) Account Management

The Account Management in this solution includes information about company accounts and customers. It provides information about the company, revenue, cost, profit and some other details. The following views are used for the Account Management:

- All Accounts
- Active Accounts
- Inactive Accounts







Figure 19: I/S Account Management list view (All Accounts)



Figure 20: I/S Account Management form view 1-6



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Figure 21: I/S Account Management form view 2-6

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Figure 22: I/S Account Management form view 3-6



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Figure 23: I/S Account Management form view 4-6

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The solution provides "no account without a lead" what means that accounts can only be created with a lead. Every company is therefore seen as potential customer.

2) Contact Management

The Contact Management in this solution contains information about contacts and the relationship such as classifications. Interactions with contacts can be automatically imported into the timeline by using the Microsoft Outlook integration. It contains general contact information and profile information. The following views are used for the Contact Management:

- All Contacts
- Active Contacts
- Inactive Contacts





Figure 26: I/S Contact Management list view (All Contacts)

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Figure 27: I/S Contact Management form view 1-2



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3) Lead Management

The Lead Management within this solution contains information about incoming leads in general and detailed. The leads contain classification to evaluate which kind of inquiry is coming in. It is shared into agencies (Recruitment) and companies. The following views are used to handle the lead management:

- All Leads
- Open Leads
- Open Leads (Agencies)
- Open Leads (Companies)
- Open Leads: Last Interaction Older Than 12 Month
- Qualified Leads By Source





Figure 29: I/S Lead Management list view (Open Leads)



Figure 30: I/S Lead Management form view 1-2



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Figure 31: I	S Lead N	lanagemen	t form view .	2-2						

The lead is bounded into the Lead-to-Opportunity sales process. By qualifying the lead, it will be transferred to an opportunity.

4) Opportunity Management

The Opportunity Management within this solution contains information about potential customers and projects such as possible products and values. To manage an opportunity the following views are used:

- All Opportunities
- Open Opportunities
- Won Opportunities
- Lost Opportunities







Figure 33: I/S Opportunity Management form view 1-3



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Figure 34: I/S Opportunity Management form view 2-3

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Figure 35: I/S Opportunity Management form view 3-3

The opportunity in this solution is used for (potential) customer projects and stays open as long as the project is running/estimated such as long as the all payment from the customer is done. Without the payment the opportunity stays open until the payment arrived. Within the



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opportunity a contract will be created and is the following step. Moreover, from opportunities can quotes be converted if necessary. The opportunity quote can contain products directly from the opportunity.

5) Contract Management

The Contract Management in this solution contains information about contracts and the fulfillment of each contract regarding the Budgets. Storing own contracts is supported such as incoming contracts. The following views are used to handle the contracts:

- All Contracts
- All Open Positions in Total (Contracts)
- All Running Contracts
- Open External Contracts
- Open Internal Contracts
- Running External Contracts
- Running Internal Contracts
- Closed External Contracts
- Closed Internal Contracts
- Canceled External Contracts
- Canceled Internal Contracts



Figure 36: I/S Contract Management list view (All Open Positions in Total (Contracts))



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Figure 37: I|S Contract Management form view 1-2



Figure 38: I/S Contract Management form view 2-2



6) Quota Management

The Quota Management in this solution lets easily create quotes with products in positions and relevant information. A quote can be created out of an opportunity (within opportunity products) such as standalone. After creating the quote in this Dynamics 365 solution the quote will be exported into a .docx document for further internal processing. The following views are used to manage quotes:

- All Quotes
- All Open Positions in Total (Quotes)
- Open Quotes
- Sent Quotes
- Enclosed Quotes
- Canceled Quotes

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Figure 39: I/S Quota Management list view (All Open Positions in Total (Quotes))



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Figure 40: I/S Quota Management form view 1-2

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Figure 41: I/S Quota Management form view 2-2

After executing quotes, the next step is to create the Order. The Order can be created directly from the quote (including defined products) or standalone.



7) Order Management

The Order Management in this solution lets create Orders either out of quotes (within the products) or standalone. The following views are used to manage Orders:

- All Orders
- All Open Positions in Total (Orders)
- Open Orders
- Sent Orders
- Fulfilled Orders
- Invoiced Orders
- Canceled Orders

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Figure 42: I	S Orde	r Mana	gement l	list view (All C	Open Posit	ions in Total (Oı	rders))				

After creating the Order in this Dynamics 365 solution the Order will be exported into a .docx document for further internal processing. After the Order is executed Service Reports can be created and related to Order Positions and are the next step when executing work at customers side.

IV. Service

The service components in this solution contains a Service Report Management and a Case Management. The Case Management can be used as a ticket system ("Ticketing"). They are primarily used within the process.





Figure 43: Inno | Solutions Dynamics 365 Advanced Sales S/C 2022 High-Level Service Processes

Whatever, each process can be handled standalone, too, to meet individual business needs. To ensure efficient or effective work performance on different tasks, this solution uses defined views. Every transaction contains relevant relationships into other tables to ensure easy and efficient or effective handling by showing, looking up or adding needed other created data entrances. By using the full-automated type defined transactions and/or field values will be created and/or filled automatically. Within Pre-Defined templates in this solution .xlsx and .docx file can be created automatically for further processing.

The objective is to reduce administrative expenditure within manual and/or automatic data entrance due to the combination of business processes in one system for the Order-to-Cash and Issue-to-Resolution Process.

1) Service Report Management

The Service Report Management in this solution lets create Service Reports to maintain and document work at customer side to track not executed Open Positions per interval (e.g. daily). It can be seen as workbreakdown for executed work activities related to a customer/project. By following the solution process, Service Reports will be related to Order positions. The following views are used for the Service Report Management:

- All Service Reports
- All Open Positions in Total (Service Reports)
- Open Service Reports
- Fulfilled Service Reports
- Sent Service Reports
- Invoiced Service Reports
- Canceled Service Report



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	SPR-2022-0201 27.05.2022		242.75.6	290.06 €	58P-2022-0183 178.50 (58P-2022-0184
nities	500 2022 0201 21:03:2022		450.00 5	230,00 E	SRP-2022-0185 357.00 €
	SRP-2022-0202 21:05:2022		150,00 €	178,50 €	SRP-2022-0166 357.00 €
IS	SRP-2022-0199 25.05.2022		37,50 €	44,63 €	SRP-2022-0188
	SRP-2022-0200 24.05.2022		225,00 €	267,75 €	SRP-2022-0189 ⊆ SRP-2022-0190 SRP-2022-0190 357,00 €
	SRP-2022-0198 23.05.2022	Example	112,50 €	133,88 €	58P-2022-0191
Reports	SRP-2022-0197 20.05.2022		37,50 €	44,63 €	8 589-2022-0192 357.00 € 5 589-2022-0193 357.00 €
	SRP-2022-0196 18.05.2022		375,00 €	446,25 €	589-2022-0194
s	SRP-2022-0195 17.05.2022		450,00 €	535,50 €	SRP-2022-0195 535.50 € SRP-2022-0196 446,25 €
otes	SRP-2022-0194 16.05.2022		525,00 €	624,75 €	5RP-2022-0197 44.63 €
	SRP-2022-0193 15.05.2022		300,00 €	357,00 €	58P-2022-0190 133.88 ¢ 58P-2022-0199 44.63 ¢
	SRP-2022-0192 14.05.2022		300,00 €	357,00 €	5RP-2022-0200 267.75 6
	SRP-2022-0191 13.05.2022		150,00 €	178,50 €	5889-2022-0202 290.06 € 5889-2022-0202 178.50 €
	SRP-2022-0190 12.05.2022		300,00 €	357,00 €	589-2022-0203
۱. ۱	SRP-2022-0189 11.05.2022		187,50 €	223,13 €	SRP-2022-0204 UR50 E SRP-2022-0205 T78.50 E
					SRP-2022-0206

Figure 44: I/S Service Report Management list view (All Open Positions In Total (Service Reports))

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Customers	General Information		Sales		
Accounts	A Service Report ID * SRP-2022-0205		Contract	PROJEKTEINZELVERTRAG NR. 60C1379133001	
R Contacts	Service Report Date * 30.05.2022		Opportunity	Example	namics 365, FO
Sales	Created By Alexander Nassl			LAIIIpie	
C Leads	Name 30.0 Dynamics 365		Collateral		
Collateral	Customer Example		Quote		
Contracts	Product		Order		
🔁 Quotes	Currency 🍨 🍪 Euro		Invoices		Add Existing Invoice
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Service Reports			Invoice ID 1	 Customer ~ 	Name ~
h Invoices	Date and Time				
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Credit Notes	End Date * 30.05.2022	Ē		INU Gata available	
Service			/		
🖉 Cases	Shipping Information		0-000		Page 1 2
Setup	Payment Terms * N30		Credit Notes	External	+ New Credit Note :
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Outline Groups	Example			No data available	
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Figure 45: Il	S Service Report Management form view 1-2				



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Customers	Positions											
Accounts	Position 1	D365	Duration 1	2 hours	\sim	Rate 1	75,00 €		🖰 Amount 1	150,00 €		
A Contacts	Position 2		Duration 2		~	Rate 2			🛆 Amount 2			
Sales	Position 3		Duration 3		~	Rate 3			🛆 Amount 3			
C Leads	Position 4		Duration 4		~	Rate 4			🛱 Amount 4			
Collateral	Position 5		Duration 5		\sim	Rate 5			🛆 Amount 5			
Contracts	Position 6		Duration 6		~	Rate 6			🛱 Amount 6			
🚯 Quotes	Position 7		Duration 7		\sim	Rate 7			🛆 Amount 7			
Orders	Position 8		Duration 8		~	Rate 8			🛆 Amount 8			
Service Reports	Position 9		Duration 9		~	Rate 9			🛆 Amount 9			
Expenses	Position 10		Duration 10		~	Rate 10			🗄 Amount 10			
Credit Notes	Position 11		Duration 11		~	Rate 11			Amount 11			
Service												
Cases	Summary											
Setup	Total Duration	2,00										
Products	🔒 Rate	75,00 €										
Price list	🗄 Total Amount (net)	150,00 €										-
Sales	🖰 Tax	19,00										

Figure 46: I/S Service Report Management form view 2-2

After creating the Service Report in this Dynamics 365 solution the Service Report will be exported into a .docx document for further internal processing. After executing the Service Reports, related invoices and/or Credit Notes will be created in a defined interval (e.g. monthly) as next step.

2) Case Management

The Case Management in this solution lets create cases/tickets which are following an Order. They will be processed within a Phone-to-Case-Process. The cases/tickets can then be worked off due to priority and capacity. The use of SLA is given. The following views are used for the Case Management:

- All Cases
- All Open Positions in Total (Cases)
- In Progress Cases
- Resolved Cases
- Canceled Cases



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Figure 47: I/	'S Case Managei	ment list view ('All Open Posi	itions In 7	otal (Case	əs))				



Figure 48: I/S Case Management form view



V. Financials

The financial components of this solution contains *Sales Invoice Management, Purchase Invoice Management, Credit Note Management, Collection Management, Bank and Cash Management, Cash Flow Forecast* and *Profit and Loss Calculation* and are primarily used as process.



Figure 49: Inno | Solutions Dynamics 365 Advanced Sales S/C 2022 High-Level Finance Processes

Whatever, each process can be handled standalone, too, to meet individual business needs. To ensure efficient or effective work performance on different tasks, this solution uses defined views. Every transaction contains relevant relationships into other tables to ensure easy and efficient or effective handling by showing, looking up or adding needed other created data entrances. By using the full-automated type defined transactions and/or field values will be created and/or filled automatically. Within Pre-Defined templates in this solution .xlsx and .docx files can be created automatically for further processing.

The objective is to reduce administrative expenditure within manual and/or automatic data entrance due to the combination of business processes in one system for the Order-to-Cash and Procure-to-Pay process.

1) Sales Invoice Management

The Sales Invoice Management in this solution lets create Sales Invoices (positive and negative) with products in positions out of Quotes, Orders or standalone (with or without products). The Sales Invoices will be created for fulfilled work in Quotes/Orders/Service Reports at customers side and is therefore the following step. The following views are used to handle the Sales Invoice Management:

- All Invoices
- All Open Positions in Total (Invoices)
- Open Invoices
- Sent Invoices
- Overdue Invoices
- Paid Invoices
- Canceled Invoices
- ta-P&L (Invoices)
- Tax Advisor



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A Contacts	0	Invoice ID $\uparrow {\scriptstyle \checkmark}$	Customer ~		Name ~		Invoice Date ~	Total Amount ~	Di	All Open Posit	ions By Today	(acc.) \vee		. ×
Sales		INV-01002-K3H7T9			03/2021 TLS x Microsoft Dy	mamics 365 (N	14.04.2021	1.309,00 €	14	60.000,00				
S Leads		INV-01003-B9C8P6			04/2021 TLS x Microsoft Dy	mamics 365	30.04.2021	5.860,75 €	3(
1 Opportunities		INV-01004-Z8Q9	Fxampl	e	05/2021-1 TLS x Microsoft	Dynamics 365	16.05.2021	3.584,88 €	16	55.000,00		54,147,98 €		
Collateral		INV-01008-G8Q9	2//0/11/01		12/2021 IT Vision Technolo	gy x Microsoft	31.12.2021	10.799,25 €	3'	50.000.00				
		INV-01009-N3P1			01/2022 IT Vision Technolo	gy x Microsoft	31.01.2022	13.405,35 €	0:					
Quotes		INV-01010-M4M			02/2022 IT Vision Technolo	av x Microsoft	28.02.2022	19.188,75 €	3'	45.000,00				
Orders														
Service Reports										40.000,00				
Invoices														
Expenses										35.000,00 - G				
Credit Notes										unomy 30.000,00				
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App Extensions														
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S Sales	1 - 6 of 6					_		Id ← Page 1	\rightarrow			Currency		

Figure 50: I/S Sales Invoice Management list view (All Open Positions In Total (Invoices))

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Customers	← □ □ □ ■ Save ■ Save & Close + 1 12/2021 Invoice In Example x M	New Delete Orefresh	🔍 Check Access 🛛 関	Ĵ Collaborate R≣ Look U	Jp Address 🕑 Invoice P	taid E Cancel Invoice d 10.799,25 (Total Amoun	Oet Products Acck Pricing I I Overdue Active Alexander Nassl V I Status Reason Status Owner V
Contacts Sales	Summary Details Related	PRODUCTS			+ Add pro	ducts : Sales	
Opportunities	INV-01008-G8Q9F3 Invoice Date*	Group By: (no grouping) ✓ ↑ ✓ Product Na ✓	∨ Oescription ∨ Pr ∨	Price Per U $\vee $ Q $\vee $ Am	iount \vee M_ \vee Tax \vee		P Example
Contracts Quotes	31.12.2021	> 1 Allgemein > 2 Allgemein	(Teams-Ca No Berechtigu No	60,00 € 0,75 60,00 € 2,00	45,00 €	8,55 € 1	
Corders Service Reports	Overdue	> 3 Allgemein > 4 Allgemein	Administr No Vorbereitu No	60,00 € 0,25 60,00 € 0,50	15,00 € 30,00 €	2,85 € 5,70 € Collate	ral
Expenses	30.12.2021	> 5 Allgemein > 6 Allgemein	(Teams-Ca No ITVT 0365 No	60,00 € 0,25 60,00 € 1,50	15,00 € 90,00 €	2,85 € Quot 17,10 € Orde	20 21
Credit Notes	19.05.2022	> 7 Allgemein> 8 Allgemein	TKINF Dyn No Administr No	60,00 € 1,50 60,00 € 0,25	90,00 €	17,10 € 2,85 €	Reports : 31.12.2021 IT Vision Technology x Mi ;
Service Ø Cases	A Created By A Alexander Nassi	> 9 Allgemein> 10 Allgemein	(Teams-Ca No (Teams-Ca No	60,00 € 0,75 60,00 € 0,50	45,00 € 30,00 €	8,55 € 3 5,70 €	SRP-2021-0106 31.12.2021 30.12.2021 IT Vision Technology x Mi
Setup	Name 12/20 Example osoft D	> 11 Allgemein > 12 Allgemein	Thyssen Kr No Administr No	60,00 € 3,00 60,00 € 1,00	180,00 € 60,00 €	34,20 € 3 11,40 €	SRP-2021-0105 30.12.2021 29.12.2021 IT Vision Technology x Mi
Price list Unit Groups	Custo	> 13 Allgemein > 14 Allgemein	Thyssen Kr No ITVT Share No	60,00 € 4,00 60,00 € 3,00	240,00 € 180,00 €	45,60 € 2 34,20 € 2	29.12.2021 28.12.2021 28.12.2021 IT Vision Technology x Mi :
 Calendar Sales settings 	🗄 Currency*	> 15 Allgemein> 16 Allgemein	Administr No Thyssen Kr No	60,00 € 1,00 60,00 € 1,50	60,00 € 90,00 €	11,40 € 17,10 €	28.12.2021 27.12.2021 IT Vision Technology x Mi : SRP-2021-0102
App Extensions	Date and Time	> 17 Allgemein > 18 Allgemein	Thyssen Kr No (Teams-Ca No	60,00 € 1,00 60,00 € 2,00	60,00 € 120,00 €	11,40 € 22,80 € 2	27.12.2021 26.12.2021 IT Vision Technology x Mi SRP-2021-0101
Sales	Date Delivered 31.12.2021	> 19 Allgemein	Thyssen Kr No	60,00 € 2,00	120,00 €	22,80 €	26.12.2021 25.12.2021 IT Vision Technology x Mi :





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Figure 52: I/S Sales Invoice Management form view 2-2

After creating the Sales Invoice in this Dynamics 365 solution the Sales Invoice will be exported into a .docx document for further internal processing. To support working with the tax advisor a special view is available within the tax advisor has access to relevant transactions and transactions data and is able to download documents as needed.

2) Purchase Invoice Management

The Purchase Invoice Management in this solution contains the entry of purchase invoice data and documents. The following views are used to maintain purchase invoices:

- All Expenses
- All Open Positions in Total (Expenses)
- Forecasted Expenses
- Open Expenses
- Overdue Expenses
- Paid Expenses
- Canceled Expenses
- ta-P&L (Depreciation)
- ta-P&L (Expenses)
- Tax Advisor



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C Leads	E0300IS6 Business Expe 04/2022 Inno Solutions Microsoft Dynam	1,44 € 19.05.2022	01.06.2022 Paid	17.000.00	
Dpportunities	22189 Business Expe Steuerberatung	230,00 € 18.05.2022	30.05.2022 Paid	16.000.00	£93,75 €
Collateral	GA/ANL Flat Rate Livin GA/ANL 05-2022	254,00 € 30.05.2022	30.05.2022 Paid	15.000.00	
Contracts	KR-103624 Business Expe Rechtsberatung	218,48 € 11.05.2022	30.05.2022 Paid	14.000,00	
🖹 Quotes	HV.DSC6 Business Expe 04/2022 Betriebshaftpflichtversicherung (f	26,92 € 13.06.2021	23.05.2022 Paid	13.000,00	
Orders	571112 (Flat Rate Insur 05/2022 gesetzl. Rentenversicherung (frei	305,97 € 22.07.2021	16.05.2022 Paid	12.000,00	
Service Reports	HV.DSC6 Business Expe 01/2022 Betriebshaftpflichtversicherung (f	26,92 € 13.06.2021	13.05.2022 Paid	11.000,00	1.383.07 4
Expenses	HV.DSC6 Business Expe 02/2022 Betriebshaftpflichtversicherung (f	26,92 € 13.06.2021	13.05.2022 Paid	@ 10.000.00	
Credit Notes	HV.DSC6 Business Expe 03/2022 Betriebshaftpflichtversicherung (f	26,92 € 13.06.2021	13.05.2022 Paid	9.000.00	
Reminders	B552693 Business Expe 04/2022 Mobilfunk LTE All 10GB (EU+Swit	31,84 € 30.04.2022	10.05.2022 Paid	- 00.000.8	
Service	KR-103571 Business Expe Rechtsberatung	138,37 € 05.05.2022	10.05.2022 Paid	5 7.000,00	
Cases	32559881 Business Expe Briefsendung / Postsendung	0,85 € 04.05.2022	04.05.2022 Paid	6.000,00	6.401.00 €
Satup	960/0521 Flat Rate Insur 01.05.2022 - 31.05.2022 Berufsunfähigkeit	32,84 € 01.12.2019	02.05.2022 Paid	5.000,00	
Products	E0300IE4 Business Expe 04/2022 Inno Solutions Microsoft Dynam	16,21 € 19.04.2022	01.05.2022 Paid	4.000,00	4329.95 €
Price list	CIV-1020 Business Expe 04/2022 Fortbildung	379,00 € 25.04.2022	29.04.2022 Paid	3.576.14 €	()))))))))))))))))))
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Sales settings	32541886 Business Expe Briefsendung / Postsendung	3,79 € 18.04.2022	18.04.2022 Paid	1.000,00 - 689,94 ¢	54,28.4
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E Partner Apps	571112 (Flat Rate Insur 04/2022 gesetzl. Rentenversicherung (frei	305,97 € 22.07.2021	07.04.2022 Paid		
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Figure 53: I|S Purchase Invoice Management list view (Paid Expenses)



Figure 54: I/S Purchase Invoice Management form view 1-2



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Figure 55: I/S Purchase Invoice Management form view 2-2

Expenses are related to customers/projects in this solution to track the costs per customer/project. A cost calculation with contributions is not given.

To support working with the tax advisor a special view is available within the tax advisor has access to relevant transactions and transactions data and is able to download documents as needed.

3) Credit Note Management

The Credit Note Management in this solution contains a special entry for Credit Notes as revenue or for Credit Notes (when not using negative invoices). The following views are used to manage Credit Notes:

- All Credit Notes
- All Open Positions in Total (Credit Notes)
- Open External Credit Notes
- Open Internal Credit Notes
- Received External Credit Notes
- Sent Internal Credit Notes
- Overdue External Credit Notes
- Overdue Internal Credit Notes
- Paid External Credit Notes
- Paid Internal Credit Notes
- ta-P&L (External Credit Notes)
- ta-P&L (Internal Credit Notes)



- Tax Advisor



Figure 56: I/S Credit Note Management list view (All Open Positions In Total (Credit Notes))



Figure 57: I/S Credit Note Management form view 1-2



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Accounts	Credit Note Example Osoft Dynamics 365 - Saved			4.685,63 € Received Total Amount Status Reason	Active Alexander Nassl V Status Owner
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Figure 58: I/	S Credit Note Management form vie	ew 2-2			

After creating the Credit Note in this Dynamics 365 solution the Credit Note will be exported into a .docx document for further internal processing. To support working with the tax advisor a special view is available within the tax advisor has access to relevant transactions and transactions data and is able to download documents as needed.

4) Collections Management

The Collections Management in this solution lets create Reminders when an invoice is not paid from the customer within an agreed timeframe. To manage collections the following views are used:

- All Reminders
- All Open Positions in Total (Reminder)
- First Reminders
- Second Reminders
- Third Reminders
- Debt Collections
- Lawyer



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Home	All Open Positions In	n Total (Reminde	ers) 🗸					Edit columns	V Edit filter	Quick find	۶	p
S Recent ∨ S Pinned ∨	O Reminder ID ~	Reminder Type 🗸	Customer ~	Name 1 ~		Invoice ID ~	Invoice Date ~	Overdue Invo	ices to Date (ac	c.) ~		×
My Work	REM-2021-0005	Third Reminder		INV-01002-K3H7T9		INV-01002-K	14.04.2021	60.000,00				
ə Dashboards	REM-2021-0008	Third Reminder		INV-01003-89C8P6		INV-01003-B	30.04.2021	FF 000 00				
Activities	REM-2021-0009	Third Reminder	Example	INV-01004-Z8Q9X2		INV-01004-Z	15.05.2021	33.000,00		54.147.98 4		
Financials	REM-2022-0003	Third Reminder		INV-01008-G8Q9F3		INV-01008-G	31.12.2021	50.000,00				
Bank and Cash M	REM-2022-0006	Third Reminder		INV-01009-N3P1M2		INV-01009-N	31.01.2022					
🛃 Cash Flow Forecast	REM-2022-0009	Third Reminder		INV-01010-M4M9S1		INV-01010-M	28.02.2022	45.000,00				
Profit and Loss Ca								10 000 00				
Customers								40.000,00				
Accounts								35.000,00				
A Contacts								punt) (6				
Sales								W 30.000,00				
© Leads								m (Inve				
Opportunities								ил 25.000,00				
Collateral								20.000.00				
Contracts								20.000,00				
Quotes								15.000,00				
Orders												
Service Reports								10.000,00				
🖺 Invoices												
Expenses								5.000,00				
Credit Notes												
Reminders								0,00		Euro		
Sales	1 - 6 of 6					14	\leftarrow Page 1 \rightarrow			Currency		

Figure 59: I/S Collections Management list view (All Open Positions In Total (Reminders))

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 ᢙ Home O Recent ∨ ✓ Pinned ∨ 	INV-01003-B9C8P6 - Saved Reminder Summary Details Related	5.860,75 € Doverdue Active Alexander Nassl V Invoice Amount Status Reason Status Owner
My Work 莽 Dashboards 团 Activities	General Data A Reminder ID REM-2021-0008 Perminder Time Total Series	Sales Opportunity Example ELANCER: Microsoft Dynamics 365
Financials		
Bank and Cash M	Name INV-01003-B9C8P6	First and Second Reminder Information
Cash Flow Forecast	Created By R Alexander Nassl	First Reminder Q INV-01003-B9C8P6
Profit and Loss Ca	Customer Customer	First Reminder Date 02.06.2021
Customers	Invoice Example nics 365	Second Reminder 🛛 🖓 INV-01003-B9C8P6
A Contacts	Invoice ID * INV-01003-B9C8P6	Second Reminder 17.06.2021
Sales	Invoice Amount * 5.860,75 €	
C Leads		Third Reminder Interest Calculation
Opportunities	Date and Time	Activate Interest? * Nein
Collateral	Invoice Date * 30.04.2021	∫
Contracts	Reminder Date * 05.07.2021	j 🛆 Interest Rate
Orders	Due Date 19.07.2021	☐ Interest Amount
Service Reports		△ Invoice Amount after
🗟 Invoices		Interest
Expenses	Address	
Credit Notes	Address 1: Name	
Reminders	Address 1: Street 1	
Sales	A Address 1. Street 7	
Figure 60: I	IS Collections Management form view 1-2	



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☆ Home	INV-01003-B9C8P6 - Saved		5.860,75 € Overdue Active Alexander Nassl ∨
🕒 Recent 🗸 🗸	Reminder		Invoice Amount Status Reason Status Owner
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My Work	Notice		
靜 Dashboards	Timeline + V II :		
Activities	P Search timeline		
Financials			
Bank and Cash M			
Cash Flow Forecast			
Profit and Loss Ca			
Customers	Get stated		
🖾 Accounts	Get stated		
R Contacts	Capture and manage all records in your timeline.		
Sales			
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Opportunities			
Collateral			
Contracts			
🚯 Quotes			
Orders			
Service Reports			
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Expenses			
Credit Notes			
Reminders			
Sales 🗘			
Figure 61: I	S Collections Management form view 2-2		

After creating the Reminder in this Dynamics 365 solution the Reminder will be exported into a .docx document for further internal processing. To support working with the advocate a special view is available within the advocate has access to relevant transactions and transactions data and is able to download documents as needed.

5) Bank and Cash Management

The Bank and Cash Management within this solution contains the possibility to maintain and show actual Bank and Cash Amounts. It supports respectively 5 Bank and 5 Cash Accounts. Different currencies are supported. An API to actualize the amounts in a defined interval can be developed. The Bank and Cash Management is managed within the following views:

- All Bank and Cash Reports
- Actual Bank and Cash Reports
- Reported Bank and Cash Reports
- Obsolete Bank and Cash Reports
- Canceled Bank and Cash Reports



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🖈 Pinned 🗸 🗸	Actual Bank-and-Cash Reports $\scriptstyle{\smallsetminus}$				Edit columns	√ Edit filters	Quick find	Q
My Work	$\bigcirc \qquad Bank-and-Cash \; Report \dots \; \downarrow \; \lor Name \; \lor \\$	Total Ban	k and Cash Amount to Date \sim Currency \sim	Status Reason ~	Bank-and-Cas	h Amount to Date	~	: ×
Dashboards Activities	01.05.2022 16.05.202	2	63,13 € Euro	Actual	70,00			
Financials					65,00		63,13 €	
Bank and Cash M					60,00			
Cash Flow Forecast								
Profit and Loss Ca					55,00			
Customers					50,00			
Accounts								
8 Contacts					@ 45,00			
					to Date			
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C Leads					주 1월 35,00			
Opportunities					k and (
Collateral					별 30,00	_		
Contracts					m (lo			
🚯 Quotes					01 23,00			
Orders					20,00			
Service Reports								
B Invoices					15,00			
Expenses					10.00			
Credit Notes								
Reminders					5,00			
Service								
_					0,00		May 2022	
Sales 🗘	1 - 1 of 1			Id ← Page 1 →		Month (Ba	nk-and-Cash Report	. Date)
Figure 62: I	S Bank and Cash Mai	nagement list view (Act	ual Bank-and-Ca	nsh-Report	s)			



Figure 63: I/S Bank and Cash Management form view 1-4



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Pinned ∨	16.05.2022 - Saved Bank-and-Cash Report Basic Information	Total Cash Total Ban	k Bank-and-Cash	Report Re	lated					63,13 € Total Bank and Ca	ih Amount to Date	Actual Status Reason	Active Status	Alexander M Owner	Nassi
Dashboards Activities	Cash Account 1														
nancials	Cash 1: ID	1													
Bank and Cash M	Cash 1: Name	Kasse													
Cash Flow Forecast Profit and Loss Ca	Cash 1: Amount	25,00 €													
istomers															
Accounts	Cash Account 2														
Contacts	Cash 2: ID														
es	Cash 2: Name														
Leads Opportunities	Cash 2: Amount	0,00 €													
lateral	Total Cash Amount	t to Date													
Contracts Quotes	🛱 Total Cash Amount Date	to 25,00 €													
Orders															
Service Reports															
Invoices															
Expenses															
Credit Notes															
keminders															

Figure 64: I/S Bank and Cash Management form view 2-4



Figure 65: I/S Bank and Cash Management form view 3-4



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🖈 Pinned 🗸 🗸	16.05.2022 - Saved			63,13 € Actual	Active Alexande	r Nassl 🗸 🗸
My Work	Bank-and-Cash Report			Total Bank and Cash Amount to Date Status Reason	Status Owner	
🖶 Dashboards	Basic Information Total Cash Total Bank Bank-and-Cash Report Rela	ited				
Activities	Calculation					
Financials	A Total Cash Amount to Date 25,00 €					
Bank and Cash M	A Total Bank Amount to					
Cash Flow Forecast	Date					
Profit and Loss Ca						
Customers	Total Bank-and-Cash Amount to Date					
Accounts	A Total Bank-and-Cash Amount to Data 63,13 €					
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B Invoices						
Expenses						
Credit Notes						
Q Reminders						
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Sales O						
Figure 66: 1	IJS Bank and Cash Management forr	n view 4-4				

The Bank and Cash Management is primarily used for the Cash Flow Forecast Feature in this solution.

6) Cash Flow Forecast

The Cash Flow Forecast within this solution lets create a Cash Flow Forecast following CAPEX <u>or</u> OPEX. Due to the flexible handling of this solution the company can decide which transactions be used for the Forecast in an interval (e.g. year). The following views are used to maintain Cash Flow Forecasts:

- All Cash Flow Forecasts
- Actual Cash Flow Forecasts
- Reported Cash Flow Forecasts
- Obsolete Cash Flow Forecasts
- Canceled Cash Flow Forecasts



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🖈 Pinned 🗸 🗸	Actual Cash-Flow-Forecas	sts ~					🖽 Edit columns 🛛 🍸	Edit filters Quick find ${\cal P}$
My Work	Cash-Flow-Forecast Re↓ ~	Interval Y Name Y			Cash-Flow-Forecast to Da ~	Status Reason ~	Cash-Flow-Forecast	to Date \lor . X
# Dashboards	01.05.2023	Monatlich 05/202			30.721,03 €	Actual		
Activities	01.04.2023	Monatlich 04/202			27.425,54 €	Actual	35.000,00	
Financials	01.03.2023	Monatlich 03/202			24.130,05 €	Actual		30.721.03 €
Bank and Cash M	01.02.2023	Monatlich 02/202			20.834,56 €	Actual	30.000.00	27.425.54
Cash Flow Forecast	01.01.2023	Monatlich 01/202			17.539,07 €	Actual	25,000.00	
Front and Loss ca	01.12.2022	Monatlich 12/202			14.243,58 €	Actual		24.150.03
Customers	01.11.2022	Monatlich 11/202			10.948,09 €	Actual	20.000.00	20.834,56 K
Accounts Contacts	01.10.2022	Monatlich 10/202			7.652,60 €	Actual	G	17.539.07 €
/ connes	01.09.2022	Monatlich 09/202			4.357,11 €	Actual	9 15.000,00	14.243,58
Sales	01.08.2022	Monatlich 08/202			1.061,62 €	Actual	ecast to	10.948.094
Ceads	01.07.2022	Monatlich 07/202			-2.233,87 €	Actual	Q 10.000,00	7.652,60 4
	01.06.2022	Monatlich 06/202			-5.529,36 €	Actual	5,000.00	4.357.114
Collateral	01.05.2022	Monatlich 05/202			-8.824,85 €	Actual	ling s	
Quotes							0,00 -	1.501.62 4
Orders								·2.233,87 €
Service Reports							-5.000,00	529.36 «
🗟 Invoices								
Expenses							-10.000,00	4.85 €
Credit Notes								
							-15.000,00	AND TOTAL T
Service							4. V	、各立《乐》文长者,张贽.
Sales 🗘	1 - 13 of 13					Id 🔶 Page 1	\rightarrow	Month (Cash-Flow-Forecast Report Date)

Figure 67: I/S Cash Flow Forecast list view (Actual Cash-Flow-Forecasts)



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	05/2023 - Saved Cash-Flow-Forecast Basic Information Forecasted Revenue Forecasted Expense Cash-Flow-Forecast Related	30.721/03 € Actual Active Alexander Nascl Cath-Flow-Forecast to Date Status Reason Status Owner	~
Activities	Invoices - All Open Positions in Total	+ New Invoice O Refresh : Total Forecasted Revenue Amount to Interval	
Financials		Quick find P Revenue Amount to 10.000,00 €	
Bank and Cash M	O Invoice ID ↑ ~ Customer ~ Name ~	Invoice Date V Total A Date	
Cash Flow Forecast	INV-01002-K3H7T9	namics 365 (N 14.04.2021 1.:	
Profit and Loss Ca	INV-01003-B9C8P6	namics 365 30.04.2021 5.1	
Customers	INV-01004-Z8Q9 Example	Dynamics 365 16.05.2021 3.1	
🖾 Accounts	INV-01008-G8Q9	31.12.2021 10.	
A Contacts	INV-01009-N3P1	37 x Microsoft 31.01.2022 13.4	
Sales	INV-01010-M4M	y x Microsoft 28.02.2022 19.	
& Leads			
Opportunities	1-6of6	I4 ← Page 1 →	
Collateral	Positions Amount 2.500,00 €		
Contracts	Credit Notes - All Open Positions in Total	+ New Credit Note O Refresh :	
🗟 Quotes		Quick find	
Orders	Credit No ∨ External ∨ Credit ↓ ∨ Customer ∨ Agency ∨	Name 🗸	
Service Reports	16605759 10.05.2022		
Expenses	16605772 09.05.2022 Exa	ample	
Credit Notes			
Reminders			
Service	1 - 2 of 2 Credit Notes - All	Id ← Page 1 →	
Sales	Open Positions 7.500,00 € Amount		

Figure 69: I/S Cash Flow Forecast form view 2-4

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🖈 Pinned 🗸 🗸	05/2023 - Saved			30.721,03 € Actual Active Alexander Nassl ∨
My Work	Cash-Flow-Forecast			Cash-Flow-Forecast to Date Status Reason Status Owner
🖶 Dashboards	Basic Information Forecasted Revenue Forecasted Expense Cash	-Flow-Forecast Related		
Activities	Expenses - All Open Positions in Total	+ New	v Expense 🖒 Refresh 🗄	Total Forecasted Expense Amount to Interval
Financials			Quick find	A Total Forecasted
Bank and Cash M	Voucher Y Expense T Y Name Y		duce ma	Date
🛃 Cash Flow Forecast	Pusiness Fires 05/2022 Mabilifusk (TE All 10/28	751 L Suit		
Profit and Loss Ca	business experiods	co+smill		
Customarz	Business Expe 05/2022 Fortbildung			
	D6548 Business Expe 06/2022 - 05/2023 APQC Memb	ership		
8 Contacts	KR-103333 Business Expe Rechtsberatung			
71 contacto	H433364 Flat Rate Insur 04/2022 Krankenversicherung so	lbstständi		
Sales	KR-103703 Business Expe Rechtsberatung			
C Leads	KR-103730 Business Expe Rechtsberatung			
Opportunities				
Collateral	1-7 of 7		I⊴ ← Page 1 →	
Contracts	Positions Amount 0,00 €			
🚯 Quotes	Expenses - All Forecasted Positions in Total	+ New	v Expense 🖒 Refresh 🗄	
Orders			Quick find	
Service Reports				
Invoices				
Expenses				
Credit Notes				
Reminders				
Service				
Sales				
Figure 70: II	S Cash Flow Forecast form view	3-4		

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が Pinned ン My Work	05/2023 - Saved Cash-Flow-Forecast	30.721,03 € Actual Active Alexander Nassl ∨ Cash-Rove-Forecast to Date Status Reason Status Reason Owner
풍 Dashboards	Basic Information Forecasted Revenue Forecasted Expense	Cash-How-Forecast Related
Activities	Calculation	Notice
Financials	Cotal Forecasted Bank and Cash Amount to 27.425,54 €	Timeline + ⊽ IE : O Saarh timeline
Bank and Cash M	A Total Forecasted	
Cash Flow Forecast	Revenue Amount to 10.000,00 €	✓ Enter a note
Customers	Cate A Total Forecasted Expense Amount to 6.704,51 € Date	
A Contacts		Get started
Sales	Cash-Flow-Forecast	Capture and manage all records in your timeline.
& Leads	A Cash-Flow-Forecast to Date 30.721,03 €	
Deportunities		
Collateral		
Contracts		
🚯 Quotes		
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Service Reports		
S Invoices		
Expenses		
Reminders		
Service		
Sales		
Figure 71: I	S Cash Flow Forecast form vie	w 4-4

7) Profit and Loss Calculation

The Profit and Loss Calculation within this solution lets create different kind of Reports in an interval by using the data from relevant tables and the Microsoft Excel export. After modelling, filtering and sorting the available data, the data entrance can be executed to maintain end-results. The results are displayed as encounters when the necessary fields are filled in.

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☆ Pinned ∨ My Work 罪 Dashboards	01.01.2022 - 31.12 Profit-and-Loss-Calcula Basic Information	2.2022 - Saved tion 0th Month January-	December (Actuals)	13th Mon	th Results	Related		Tot	- tal Profit-and-	Loss to Date	Total Retur	n on Sales	Total Depreciation t	o Date	Vorsteu	erüberhang	\sim
Activities	General Data				Report Setti	ings											
Financials	Year	2022			A Use Gross Amounts	or Net Ye	5										
Bank and Cash M	Name	01.01.2022 - 31.1	12.2022		Include Pre Year-End R	evious * Results Ye											
Profit and Loss Ca	Purpose	Fx	ample		Include Pre Interval-En	evious * nd-Results Ye											
Customers			lampre		Include Oti Results	her-End- * Ye											
🖾 Accounts	Interval				Include Sal	les Tax * Ye	;										
A Contacts	Effective From	• 01.01.2022			Include De	preciation * Ye											
Sales	Effective To	* 31.12.2022			Include De	preciation *											
C Leads					Rate (Gov)	NC											
U Opportunities	Currency				on Sales	tal Return Ye	;										
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Figure 72: I/S Profit and Loss Calculation form view 1-5

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My Work	Profit-and-Loss-Calculation		otal Profit-and-Loss to Date Total Return on Sales Status Reason Owner
静 Dashboards	Basic Information 0th Month January-December (Actuals) 13th Mon	nth Results Related	
Activities	Year-End Results Transfer	Interval-End Results	Other-End Results
Financials	A Previous Year-End- Desuits (2.0.) 0,00 €	A Previous Interval- End-Results (03) 0,00 €	A Previous Other-End- 0,00 €
Bank and Cash M	Results (P/L)	Eug-Results (P/L)	Results
Cash Flow Forecast			
Profit and Loss Ca			
Customers			
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Salar			
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Fiaure 73: I	 S Profit and Loss Calculation form	view 2-5	

Figure 74: I/S Profit and Loss Calculation form view 3-5

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Dashboards	Ba	asic Informa	ation 0th Month	January-December	(Actuals) 13th Mo	onth Results Related						
Activities		Depreciati	ion									
ancials		All Expenses	5							+ New Expense	🖒 Refresh 👦	√° Flow ∨ :
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Profit and Loss Ca			H433364416	Flat Rate Insurance	01/2022 Krankenve	ersicherung selbstständi	933,65 €		933,65 €	15.02.2022	15.02.2022	Paid
tomers			H433364416	Flat Rate Insurance	02/2022 Krankenve	ersicherung selbstständi	933,65 €		933,65 €	15.03.2022	15.03.2022	Paid
Accounts			H433364416	Flat Rate Insurance	03/2022 Krankenve	ersicherung selbstständi	933,65 €	0,00 €	933,65 €	19.04.2022	19.04.2022	Paid
Contacts			H433364416	Flat Rate Insurance	04/2022 Krankenve	ersicherung selbstständi	933,65 €	0,00 €	933,65 €		16.05.2022	Overdue
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Leads		1 - 4 of 1	11								14	← Page 1 →
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sales V		_		<u> </u>								

Figure 75: I/S Profit and Loss Calculation form view 4-5

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		IVIOUE	emste Prozesse fur fin Onternenmen:
Inno Solutions	Dynamics 365, IJS Advanced Sales SC 2	♀ Search	Q + Q @ ? (M)
=	← □ 🖬 Save 🛱 Save & Close + New 🕃 Deactivate 📋 Delete	e 🖒 Refresh 🔍 Check Access 📴 Process 🗸 Assign 🖻 Share	🛱 Email a Link 🛛 Plow 🗸 🖷 Word Templates 🗸 🗐 Run Report 🗸
☆ Pinned ∨ My Work	01.01.2022 - 31.12.2022 - Unsaved Profit-and-Loss-Calculation	Total Profit-and-L	oss to Date Total Return on Sales Total Depreciation to Date Vorsteuerüberhang
節 Dashboards	Basic Information 0th Month January-December (Actuals) 13th Mo	nth Results Related	
Activities	Profit and Loss	Depreciation	Tax
Financials	Total Profit-and-Loss to Date	Total Depreciation to Date	Vorsteuerüberhang to Date
Bank and Cash M			
Cash Flow Forecast			
Profit and Loss Ca	Total Return on Sales		
Customers	🛆 Total Return on Sales 🛛		
Accounts			
O Cumburda			

Figure 76: I/S Profit and Loss Calculation form view 5-5

The Profit and Loss Calculation contains different settings which can be used to adapt data to specific needs.

VI. Product Management

The Product Management within this solution contains the possibility to create and maintain products and services and related components such as price lists as per Microsoft Dynamics 365 Sales Professional default. The possibility to create products, product bundles and product families is given.

Inno Solutions	Dynamics	365, IJS	Advanced Sales SC 2			2	Search					Q	+ 7 🗞	? (AN)
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Accounts	All P	rodu	ts ~							[]	dit columns	T Edit filters	Quick find	Q
R Contacts	0	50	Name 🗸					Product ID ↑ ~		Amount ~	Status ~		Modified On ~	
Sales		ጽ	Inno Solutions Absatz	marketing				00001			Active		05.06.2021 14:58	
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Opportunities		å	Inno Solutions Sortim	ent				00003			Active		05.06.2021 14:58	
Collateral		윦	Allgemeine Beratungsl	eistungen (Remote)				00004			Active		05.06.2021 15:13	
Contracts		윦	Spezifische Beratungsl	eistungen (Remote)				00005			Active		05.06.2021 15:13	
🚯 Quotes		å	Administrationsleistun	gen (Remote)				00006			Active		05.06.2021 15:13	
Orders		ጽ	Einrichtungsleistungen	(Remote)				00007			Active		05.06.2021 15:14	
Service Reports		ጽ	Schulungsleistungen (F	lemote)				00008			Active		05.06.2021 15:14	
Expenses		ጽ	Supportleistungen (Re	note)				00009			Active		05.06.2021 16:15	
Credit Notes		ጽ	Allgemeine Beratungsl	eistungen (vor Ort)				00010			Active		05.06.2021 15:43	
Reminders		ጽ	Spezifische Beratungsle	istungen (vor Ort)				00011			Active		05.06.2021 15:47	
Service		ጽ	Administrationsleistun	gen (vor Ort)				00012			Active		05.06.2021 15:47	
Cases		品	Einrichtungsleistungen	(vor Ort)				00013			Active		05.06.2021 15:47	
Setup		윩	Schulungsleistungen (v	or Ort)				00014			Active		05.06.2021 15:49	
Products		윩	Supportleistungen (vor	Ort)				00015			Active		05.06.2021 15:50	
Price list		윩	Externe Dienstleistung	en -Remote- (Verrec	hnung über der	Dienstleister, GT)		00016			Active		06.06.2021 16:26	
🔷 Unit Groups		ጽ	Externe Dienstleistung	en -vor Ort- (Verrech	nung über den	Dienstleister, GT)		00017			Active		06.06.2021 16:27	
Calendar		ጽ	Mixed Services (Remot	e)				00018			Active		06.09.2021 19:55	
१८३ Sales settings		ጽ	Mixed Services (vor Or	0				00019			Active		06.09.2021 19:57	
App Extensions			TESTPRODUKT					TEST		140,00 €	Active		05.06.2021 16:13	
E Partner Apps														
Sales	1 - 20 o	20											₫ €	– Page 1 →

Figure 77: I/S Product Management list view

VII. Document Management

As per Microsoft licenses possible can either Sharepoint be used or the Dataverse Data File Capacity for the Document Management within this solution. Due to capacity purposes, it's recommended to use the Sharepoint Document Management for primarily documents.

Therefore, in the most forms navigate to the tab "related" and choose "documents".

Figure 79: I/S Document Management per Entity via Sharepoint

The documents can then be uploaded, handled and downloaded. The files are saved in Sharepoint. The files are referenced between related transactions and can be opened from different entities via the "related" tab. Moreover, via the "related" tab, all related transactions can be viewed for the chosen data entrance (primarily all related lookup fields).

Additional documents can be uploaded for defined entities directly into the transaction what will affect the Data File Capacity of Dataverse. This time it's possible for the entities Contracts, Expenses and Credit Notes.

		I	viouernste rioz	esse iui		internetiin	en
06/2022 - 05/2023 APQC Membership - Saved Expense			7.000,00 \$ Total Amount	Overdue Status Reason	Active Status	Alexander Nassl Owner	\sim
Summary Details Related							_
Forecast? Nein	Detail Amount	7.000,00 \$	Voucher				
Includes Charge? Nein	(-) Discount (%)		Voucher	<u>D6548.pdf</u>	Delete		
	(-) Discount						
General	A Pre-Freight Amount	7.000,00 \$					
A Voucher ID VOL-2022-01148	/ .) Familak Associate						

Figure 80: I/S Document Management for specific Entities via Dataverse

VIII. Activities Management

As per Microsoft licenses in default possible, an Outlook integration can be used to manage activities within this solution. Due to individual settings an outlook calendar and/or messages can automatically be imported into Microsoft Dynamics 365 when marked.

Inno Solutions	mics 365, I S Advanced Sales SC 2		✓ Search				ତ + ⊚ ?
	🔶 🕼 Show Chart 🖪 Task 🖻	🖲 Email 🛛 Appointment 📎	Phone Call 🔳 Letter 🌐 I	Fax 😰 Service Activity 🤝 Ca	ampaign Response 📋 Other Act	ivities \checkmark 🗊 Delete \checkmark	🖒 Refresh 🗄
Recent V	All Activities* \sim				Ed Ed	it columns 🛛 🍸 Edit filters	Quick find
🖈 Pinned 🗸 🗸	Due	Activity Type					
My Work	All 🗸	All	\sim				
해 Dashboards	DAY WEEK MONTH		<	15.05.2022 - 21.05.2022	>		TODAY
Activities	SO, 15. MAI 2022	MO, 16. MAI 2022	DI, 17. MAI 2022	MI, 18. MAI 2022	DO, 19. MAI 2022	FR, 20. MAI 2022	SA, 21. MAJ 2022
Financials				Example			
Bank and Cash M	07						
Cash Flow Forecast		-					
Profit and Loss Ca	80	D365 Test Automation (RW/SU) - SDesign Prop.	Barcode - GS1	Power Apps Al Builder	APQC Tune Up Diagnostics	Dynamics 365 HR Infrastructure Merge - FO/LCS &	Modernizing Jenkins Pipelines With CD Automation
Customers						HR/PowerPlatform	Shift Left Done Right
Accounts	09						
A Contacts	10	D365 automatisierte					
Sales		benutzeranage - stresign rrop.					
& Leads	11			Power Automate - Konnektoren			
Opportunities						Wöchentliche Abstimmung	
Collateral	12						
Contracts							
🗟 Quotes	13						1
Orders		SD - License Configuration	SD - Feature Management	Pressar BI Embedded			
Service Reports	14	(activated/deactivated)	(enabled/disabled Features)				
linvoices							
Expenses	15						
Credit Notes				-			
Sales V	16						

Figure 81: I/S Activities Management form view

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Figure 82: I/S Activities Management in the Timeline (ex. Contacts)

IX. Microsoft Teams Integration

The solution is designed and developed to interact with Microsoft Teams. To have all necessary applications in one system (in this case Microsoft Teams) this solution can be integrated into Microsoft Teams as per Microsoft license in default possible.

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Figure 83: I/S Advanced Sales S/C 2022 in Microsoft Teams

X. Advanced and Personal Settings

Advanced Settings can be used and edited global as needed in this solution as per Microsoft Dynamics 365 Sales Professional default.

III Inn	o Solutions Settings -> Business Management		P O + V O ? 🍚
New Ale	rts (12) Latest: You've got an alert for the mailbox 'Alexander Nassi'. Vesterday 11:40 View Alerts		×
Busines	s Management		
Which fea	ture would you like to work with?		
2	Fiscal Year Settings Set the start date, thereplate, and display options for the fiscal year and fiscal period used for tracking sales goals.		Goal Metrics Define and munage the kinds of goals that your organization tracks.
×	Business Closures Create a list of holidays and other times when the business is doned.		Facilities/Equipment Add facilities and equipment for senior scheduling. Change information about resources or delete existing resources.
	Queues Create and manage service queues, and manage the membership of private queues. Establish otheria for automatic record creation and updates.		Resource Groups Add new groups and new members to existing groups for service scheduling. Update group information and delete groups or group members.
9	Sales Territories Create new sales territories and assign territory managers. Add and remove members, modify territory information, and delete territories.	į	Services Add new services for service scheduling. Charge service information and deactivete existing services.
	Sites Create new sites or office locations where service operations take place. Add and remove resources, change site information, or delete sites.		Subjects Manage the subject Herarchy for your organization's products. Researce, and articles.
4	Currencies Add nee currencies or change the exchange rates for existing currencies.		Connection Roles Create, edit, and delete the standard labels used to define connections between records.
r ÷≓÷	Automatic Record Creation and Update Rules Create and manage rules for automatic record creation and updates. You can set up rules for either out-of-the-box entities or castom entities.	Þ	Rollup Queries Go to your list of Rollup Queries that you can use to gather data about a group of related records.
in	Linkedin Sales Navigator Manage settings relating to Linkedin Sales Navigator Integration		

Figure 84: I/S Dynamics 365 Advanced Sales S/C 2022 Advanced Settings Page

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Personal Settings can be used and edited per user in this solution as per Microsoft Dynamics 365 Sales Professional possible and needed.

Inno Solutions	Dynamics 365, I S Advanced Sales	SC 2	P Search			\circ + \lor	🏽 ? 🔊
=	← 📶 Show Visual Filter 🖓	7 Show Global Filter 🖼 Switch to Tile View 🕂 M	New 💛 🗙 Clear Default 💍 Refres	ih All			
Ĝ Home③ Recent ∨	Sales Analysis Dashb	oard ~				This Quarter 01.04.202	2 To 30.06.2022 🗸
🖈 Pinned 🗸 🗸	Open Opportunities	Filtered Open Leads	Unfiltered	Open Activities	Unfiltered	Scheduled Activities	Unfiltered
My Work		Set Personal Ontions			0 X		
师 Dashboards	1 ↓ Modified On ∨	Change the default display settings to personalize	e Microsoft Dynamics 365, and manage yo	ur email templates.		55 ↑ Due Date ∨	85
2 Activities	Cytena x FREELAN Cx Cytena GmbH					Appointment Normal 21.05.2022 10:00	
Financials	Gregor Kupke	General Synchronization Activities Formats Email	Templates Email Signatures Email Privacy	Languages		SL Shift Left Done Right	
Financiais		Select your home page and settings for Get Started panes			<u>^</u>	Scheduled	
Bank and Cash M		Default Pane <default based="" on="" role="" user=""></default>	♥ Default Tab	<default based="" on="" role="" user=""></default>	~	Appointment Normal 25.05.2022 20:00	
Cash Flow Forecast		Set the number of records shown per page in any list of reco	ords			Webinar: Building a Computer	Vision Ap
Front and Loss Ca		Records Per Page 50	*			Criteria	
Customers		Select the default mode in Advanced Find				Appointment Normal 26.05.2022 19:00	
🔁 Accounts		Advanced Find Mode	O Detailed			APOC Webinar Building the B	oadman T
R Contacts		Select the default search experience					aumup -
Salar		Default Search Experience Dataverse search	*			Scheduled	
and the second		Eacets and Filters Configure				Appointment Normal 28.05.2022 09:00	
						TC The Complete Guide to Open S	ource Lice
D Opportunities		Set the time zone you are in Time Zone (GMT+01:00) Amsterdam. Berlin. Bern.	Rome. Stockholm. Vienn. 🛩			Scheduled	
Collateral						Appointment Normal 04.06.2022 09:00	
Contracts		Select a default currency	78			NVIDIA: Building and Running	an End-to
🚯 Quotes		· · · · · · · · · · · · · · · · · · ·				Schadulad	
Orders				0	K Cancel	Appointment Normal 04.06.2022 10:00	
Service Reports			1.19233	USIVA		Parcel Shipping App for Busine	ess Central
Invoices		CR 24.08.20 Dahmsta	21 16:56 hl x FREELANCER: Microsoft Dy				12 Section
Expenses		New		Open		Scheduled	
Credit Notes		Social Network He Low-to-Opportunity	endrik y Claeys <u>Alexander Nassi</u>	Appointment Normal 11.09.2022 0		Appointment Normal 04.06.2022 11:00	
Reminders		HC 07.05.202	22 20:36	Ek EkStVA		VS Value Stream Management - Co	ontinuous
S Sales		TransCure	e_bioServices x FREELANCER:				

Figure 85: I/S Dynamics 365 S/C 2022 Personal Settings Page

XI. Future Releases and Planned Features

As this solution is the Pre-Release as Pilot 1 version (Build 1.1.1.0001) it will get more features in the future. In total three Pilots will be executed to meet the business needs for small companies for this specific market solution with the following enhancements:

Pilot 1 version

- Enhanced Profit and Loss Calculation
- Diverse Features

Pilot 2 version

- Enhanced Product Management
- Enhanced Tax Management
- Diverse Features

Pilot 3 version

- Enhanced Supply Chain Features
- Diverse Features

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