

Installation and configuration guide for the Plur-E extension. V 1.05



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1. Instalalling the Extension.

1.0) Before starting the installation, the user who uploads the extension is required to have administrative privileges with the role of "Super".

In the "User Permission Sets" area of the "User Card" we can validate that our user complies with the previous requirement.

User Permission Sets Manage							
	Permission Set 1		Description	Company 1	Extension Name	Permission Scope	
\rightarrow	SUPER					System	

1.1) We look in the magnifying glass, "extensions" and then we click on "Extension Management":

Tell me what you want to do					
extensions					
Go to Pages and Tasks					
> Warehouse Insight Quantity Extensions	Administration				
> Extension Management	Administration				
> Extension Marketplace	Administration				

1.2) Then the following window will open in which we will click on the option "Upload Extensions"

\leftarrow	Installed Extensions							
	, O Search Manage Page Actions F	ewer options						
	Extension Marketplace Upload Extension	🗟 Deployment Status	🗮 Uninstall	🗮 Unpublish	📌 Configure	🗋 Download Source	1 Learn More	🌄 Refresh

1.3) In the following Window we click on the 3 points at the end of "Select .app file":

Upload And Deploy Extension \checkmark				
Upload Extension				
Select .app file · · · · · · · · · · · · · · · · · · ·				
Deploy Extension				
Deploy to	Current version		~	
Language · · · · · · · · · · · · · · · · · · ·	English (United States)			
Disclaimer				
Accept · · · · · · · · · · · · · · · · · · ·				
Read more about the best practices t	for installing and publishing extensions			

Deploy Cancel



This will open the extensions loading window, which will allow us to upload our "Plur-e" extension.

💿 Open								×
\leftarrow \rightarrow \checkmark \uparrow \blacksquare \rightarrow This PC \rightarrow	Local Disk	(E:) > Downloads			v ت	🔎 Search Downloa	ds	
Organize 👻 New folder						₽ ₩		?
🖈 Quick access	^	Name	Date modified	Туре	Size			
E Desktop		Plur-e_Plur-e_1.0.0.7.app	6/23/2021 4:11 PM	APP File	99 KB			
🝀 Dropbox								
OneDrive	~							
File name: Plur	-e_Plur-e_1.	.0.0.7.app			~	APP File (*.app)		\sim
						Open	Cancel	

1.4) After selecting it, click on "Accept" and then on "Deploy".

Select .app file		Plur-e_Plur-e_1.0.0.7.app	
Deploy Extens	ion		
Deploy to		Current version	
Language ····		English (United States)	
Disclaimer			
Accept · · · · ·			
Read more abo	ut the best practices	for installing and publishing extensions	

We will get the following message indicating that our extension is in progress.

(\mathbf{i})	Extension deployment is in progress. Please check the
\bigcirc	Deployment Status page for updates.

ОК

Cancel

Deploy

Finally, if we click on "Deploment Status" we can see the status of our installation.



Installed Extensions Search Manage Page Actions Fewer options Actions Fewer options Extension Marketplace Upload Extension Component Status Winnstall Winnstall Winnstall Winnstall Configure Download Source Dearn More Refresh

For a few minutes we will have the "Progress" status.

Extension Deployment Status							Ľ ,≮
,⊃ Search Page							∀ ■
Name	Publisher	Operation Type	Status	Schedule	App Version	Started Date ↓	
<u>Plur-e</u>	Plur-e	Upload	InProgress	Immediate	1.0.0.7	6/24/2021 10:51 AM	

Then if we refresh we can see that everything went successfully when seeing the status "Completed"

Extension Deployment Status Work Date: 4/6/2020							⊂ ,×
, ○ Search Page							$\nabla \equiv$
Name	Publisher	Operation Type	Status	Schedule	App Version	Started Date 4	
<u>Plur-e</u>	: Plur-e	Upload	Completed	Immediate	1.0.0.7	6/24/2021 12:20 PM	



2. Error handling

If at the time of loading the extension the "**Status**" instead of saying "Completed" says "**Failed**", it is necessary to carry out the following steps:

1) We click on the name of the extension, in our case "Plur-e":

\leftarrow	Extension Deployment Status		
	✓ Search Page		
	Name		Publisher
	<u>Plur-e</u>	:	Plur-e
~~ ~	Mindow like the following:		

2) Se We will see a Window like the following:

\leftarrow	Extension Deployment Stat	us Detail 🖉	+ 1	Ľ 2					
	Uploading Extension: 'Plur-e' by 'Plur-e'								
	General								
	App Name	Plur-e	Status	Completed					
	App Publisher	Plur-e	Summary · · · · · · · · · · · · · · · · · · ·	Extension Plur-e by Plur-e was					
	App Version	1.0.0.7		successionly installed.					
	Schedule · · · · · · · · · · · ·	Immediate							
	Started Date	6/29/2021 10:13 AM							

Where in Summary we will have a summary of the "Status", generally after a successful installation it will say "Plur-e was successfully installed" but in case of error it will show us a different message with the cause of the problem, if so, we must click on "Download Details" and send the information to the email support@plur-e.com so that the team of Engineers can help you make the pertinent correction and correct installation.

Uplo	ading Exter	nsion: 'Pl	ur-e' by	/ 'Plur-e'	I
🕄 Refresh	Download Details				



3. Start Wizard

Before starting the Wizard we must review the activation email sent by Support, it will have a format similar to the following image:

Your account has been activated. For your convenience, we have included your login information below:
Login: <u>ivan.labrador@mscloudexperts.com</u>
Please follow the next steps:
1. Download the Plur-e wizard package: Plur-e Wizard Package
2. Go to your Bussiness Central Environment, install the package and start the Wizard setup.
3. This information is required in your configuration:
APIKey: REVWfGN1c19LNmFwc0lyS1pTWTBUaA

From the above it is important to write down or have at hand the following information, the "Api Key" since we will need it in step 5.

1) Once the extension is installed, we are going to run our wizard that will help us configure it in Business Central.

For this we have 2 options.

1.1) Through the main window of Business Central or also known as Role Center, a notification will appear that our setup must be executed because our "Plur-e App has not been activated":

 Dynamics 365 Business Central	
CRONUS USA,	Inc. Finance Cash Management Sales Purchasing Setup & Extensions
Customers Vend	ors Items Bank Accounts Chart of Accounts
Notifications: 4	
X You have not co	mpleted the Plur-E setup wizard. Get Started

To execute it we must click on "Get Started"

1.2) Alternatively, go to the magnifying glass and look for "Assisted Setup "



fell me what you want to do	2 >
assi	
On current page (Business Manager)	
Assisted Setup Set up core functionality such as sale	s tax, sending documents as email, and approv
Go to Pages and Tasks	Show all (22)
> Assisted Setup	Administration

We will see a window similar to the following one, where we will click on "Plur-E Setup".

\leftarrow	Assisted Setup					
	imes Reminder: your work date is 4/6/2020	Use tod	lay Char	ige to 1	Turn off reminder	~
	🔎 Search 📲 Open in Excel 🛛 🕅 Mo	re options				∇
	☆ Title	Compl	Help	Video	Translated Name	Description
	Set up your company		-	-	-	
	Set up sales tax		Read	Watch	Set up sales tax	Set up sales tax infor
	Set up exchange rates service		Read	Watch	Set up exchange rates service	View or update curre
	Enter company details		Read	-	Enter company details	Provide your compar
	Set up DIOT		-	-	Set up DIOT	
	Set up Plur-E	1	Read	Watch	Set up Plur-E	
	Fetch users from Microsoft 365		_	_	Fetch users from Microsoft 365	Get the latest inform

2) Once option 1 or 2 of the previous step has been chosen, The window of our Wizard will open, which to advance it is necessary that we accept the terms and conditions.





- Then in the next window we must enter the following information obtained in step:
 a) User Id.
 - b) User Token. (Web services API Key).
 - c) Api Key. (Sent by Email).

Plur-E Wizard assisted setup	guide		∠ ≻
٤̈́̈́̈́			
Activation			
Enter the Api Key providing via Email to co	ontinue		
User Id · · · · · · · · · · · · · · · · · ·			~
User Token · · · · · · · · · · · · · · · · · · ·			
Арі Кеу			
ſ	Back	Activate	Finish

3.1) **Useri ID**: we must obtain the information of a user account that will be in charge of managing the connections with the mobile application.

To select the User Id we click on the down arrow as marked in the following image:

Enter the Api Key providing via Email	to continue	
User Id · · · · · · · · · · · · · · · · · ·		\sim

This will display the list of System Users as seen below:

Plur-E Wizard assisted setup guide	∠ X is again.
ર્દ્રેડ	Reports
Activation	
Enter the Api Key providing via Email to continue	
User Id · · · · · · · · · · · · · · · · · ·	~
User Token	User Name
End Point	IVAN.LABRADOR
Api Key	JUAN.PENA 1
	JUAN.PENA
	MSOLSYNC
	ALEXANDRA.GONZALEZ
	Select from full list
	Invoices



3.2) User Token: it is the token or "Web Services Access Key" configured in the user file that we must take to configure our extension.

To do this, we click on the 3 points as seen in the following image:

Plur-E Wizard assisted se	tup guide		2 X
ξ ^ζ ε			
Activation			
Enter the Api Key providing via Emai	l to continue		
User Id · · · · · · · · · · · · · · · · · ·	IVAN.LABRADOR1		\sim
User Token 🛛 😽 🔸			
Api Key 🔹 😽 🔺			
	Back	Activate	Finish

You must copy the information from the field "Web Services Access key" is marked in yellow.

Edit - User Card - Ivan Labrador	$_{\sim}$ \times
Notifications: 2 Web Service Access Key has been deprecated in	n Business Central online. Pl Reminder: your work date is 5 \vee
Manage 🗄 Effective Permissions Page More optic	ins ()
General	Show less
User Name · · · · · · · · · · · · · · · · · · ·	Microsoft 365
Full Name · · · · · · · Ivan Labrador	Authentication Email · · · · ivan.labrador@mscloudexperts
Status · · · · · · Enabled 🗸	Mapped To Exchange ·
Contact Email · · · · · · ivan.labrador@mscloudexperts.co	Authentication Status · · · Active
	Web Service
	Web Service Access Key · · · IPSe7HKog+7xBg0HT1wJ
	Web Service Expiry Da

Then you must paste this information in "Plur-e Setup form".



Note: it is suggested to maximize the previous window in order to be able to visualize the "Web Services Access Key" in a complete way and not to have the possibility of compiling the incomplete information as seen in the following image:

User Card	(\mathcal{P})) +	•	√ Saved	ت م ^ر ا
Ivan Labrador					
Notifications: 2 Web Service Access Key has been dep	recated in Business Central online. Please use OAuth. Reminder: your work	date is !	5/1/2020		~
Effective Permissions More options					0
General				s	show more
User Name	IVAN.LABRADOR1		Microsoft 365		
Full Name	Ivan Labrador		Authentication Email ivan.labrador@mscloudexperts.com		
Status	Enabled		Authentication Status Active		
Contact Email	ivan.labrador@mscloudexperts.com		Web Service		
			Web Service Access Key · · · · · · · · · · · · · · · · · · ·	.=	

In the event that the selected user does not have this information, it is necessary to generate the Token through the 3 points of the "Web Services Access Key" field and the following pop-up window will be displayed.

?	The current Web Service Access Key will not be valid after editing. All clients that use it have to be updated. Do you want to continue?

Yes

No

Which we answer with Yes.

The following window will open, we select that our token never expires, and we respond with clicking the Ok button.

I	Edit - Set Web Service Access Key - Ivan Labrador	$\scriptstyle \nearrow \times$
ł	Key Never Expires	
,	Key Expiration Date	
	ок	Cancel
By clicking ok our toke	en will be generated as seen in the following image:	
	Web Service	
	Web Service Access Key · PSe7HKog+7xBg0HT1wJ ···	
	Web Service Expiry Da	

Once the information is filled in, we will see something like the following window:



Plur-E Wizard assisted setup guide		
\$ <u>`</u>		
Activation		
Enter the Api Key providing via Ema	il to continue	
User Id	IVAN.LABRADOR1	\sim
User Token	IPSe7HKog+7xBg0HT1wJmnYLQ9LpEpTrc	
Арі Кеу \cdots 😽 🔺		
	Back Activate Fini	ish

5) We copy the ApiKey that was sent to us by mail.

	Plur-E Wizard assisted setup guide	2	\times
	Activation		
	Enter the Api Key providing via Email to continue		
)	User Id ····· IVAN.LABRADOR1		\sim
	User Token IPSe7HKog+7xBg0HT1wJmnYLQ9L	pEpTrc	
	Api Key · · · · · · · · · · · · · · · REVWfGN1c19LNmFwc0lyS1pTWTi	3UaA	
	Back Activate	Finisl	n

6) We Click on the Activate Button, we will obtain the following window, which we must select "Allow Always" and accept it, this will allow us to validate the information entered with the Plur-E portal



	si
(The extension 'Plur-e by Plur-e' is making a request to an external service. Do you want to allow this request?
	Allow Always
	○ Allow Once
	⊖ Block Always
	O Block Once
	OK Cancel
_	Copy Ctrl+C

7) Once the extension is activated, a penultimate window of the wizard will open that will allow us to configure the series of documents that we can use in our mobile application. This list of series will be "Pre-Selected" according to the modules purchased in the Plur-E portal.

Plur-E Wizard assisted setu	p guide		$\scriptstyle \nearrow \times$
Sales Order Enabled Sales Order	O		
Sales Order Series No.			\sim
Sales Return Order Enabled Return Order	0		
Sales Return Order Series No. · · ·			\sim
Sales Cr Memo Enabled Credit Memot Order · · · · C Sales Credit Memo Series No. · · ·	D		~
Sales Invoice Enabled Sales Invoice	0		
	Back	Next	Finish

7.1) For example, we can create or use an existing series for the "Sales Order Series No." As seen in the following image.

Sales Order	_
Enabled Sales Order	
Sales Order Series No.	s-ord \checkmark

8) By clicking Next, we will be shown that we have finished configuring the extension.



Plur-E Wizard	assisted setup guide	9	$Z \times$
ξ <u>ζ</u> γ			
You're done! Click Finish to setup	your rewards level and start u	sing Plur-E Wizard.	

Back Finish

Once finished, the extension will open the Plur-E settings window that will allow us to activate or deactivate modules, series of documents.

	Ø	+ 🗊	√ Saved	口 (
Plur-E Setup				
\times Reminder: your work date is 5/1/2020	Use today Chang	ge to Turn off remind	ler	
New Process More options				
General				
Company Enable		UserID · · · · · · ·	IVAN.LABRADOR1	
Plure Api Key		UserToken · · · · ·	•••••	
Requeriments				
Are there Customers? · · · ·		Are there Sales Pers	:o ·	
Are there items?				
Payments >				
Sales Order >				
Sales Invoice >				
Return Order >				
Credit Memo >				

Additionally, we can activate or deactivate the company we are in as seen in the following image:

× Reminder: your work date is 5/1/2020	Use today Change to Turn off reminder	~
New Process More options		
General		

Finally, it is not necessary to run the wizard again to enter the previous configuration window, we can look in the magnifying glass "Plur-E Setup" and we can also open it, the only requirement is that if the extension must be active.



Tell me what you want to do	\mathcal{Z} \times	
plur s		^
Go to Pages and Tasks		- 1
> Plur-E Setup	Administration	۵
> Plur-E Api Methods	Administration	- 1
> Printer Management	Administration	- 1

You have successfully installed the Plur-e package! You will receive a confirmation email to set up your Mobile Users.