

Configuration and use of Plur-e Web Dashboard

By



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Change Record

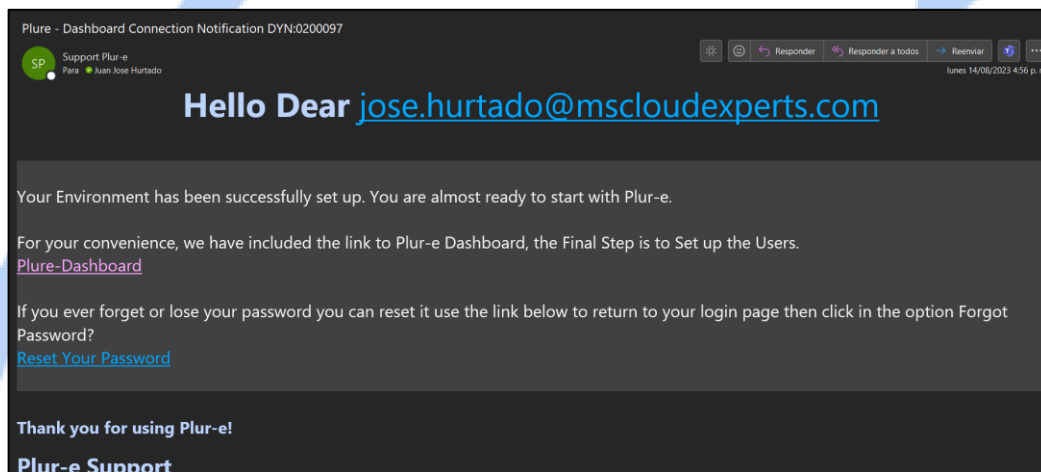
Date	Author	Version	Change reference
10/08/2024	Juan Jose Hurtado	1.2	

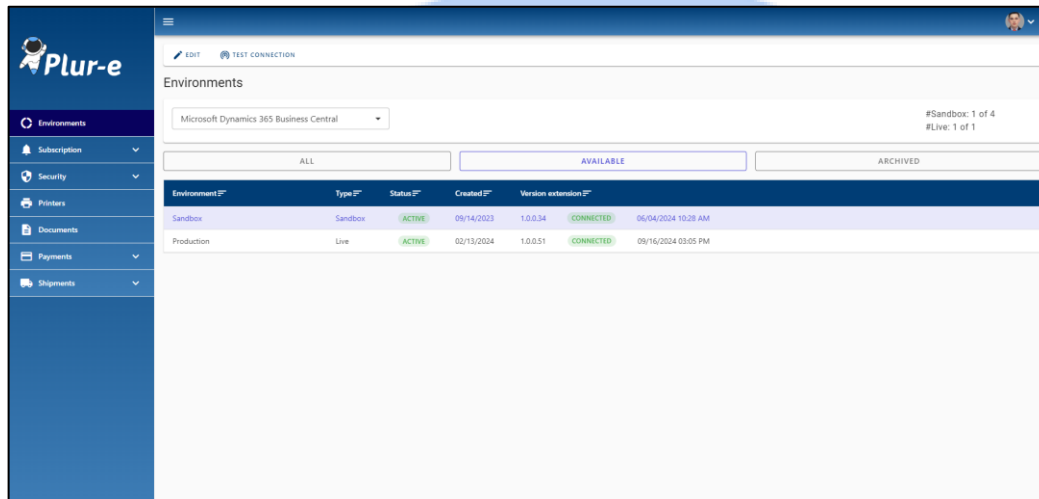
Introduction

Plur-E is a mobile application for Android devices that provides fast and efficient management of the sales, warehouse and inventory management and payment modules of Dynamics 365 Business Central ERP through its extension. This document summarizes the functionalities of the Plur-e Dashboard.

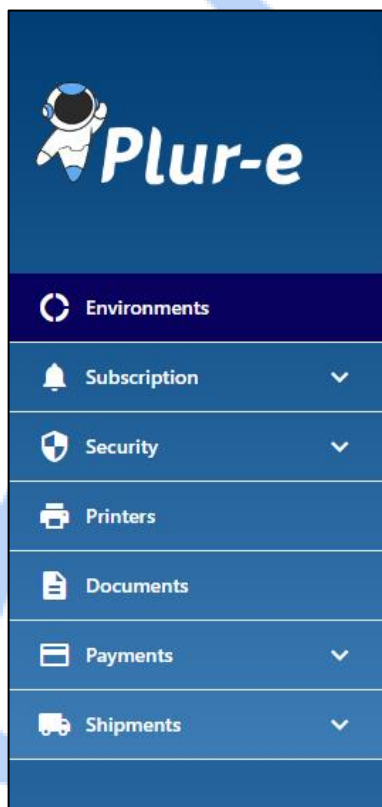
Plur-E Web Dashboard Configuration

Once the Plur-e extension has been installed in Business Central, you should receive an email from Support Plur-e, where it mentions that the environment was configured correctly, in this email we can find the link to enter the Plur-e Dashboard to correctly configure the users that will use the application.



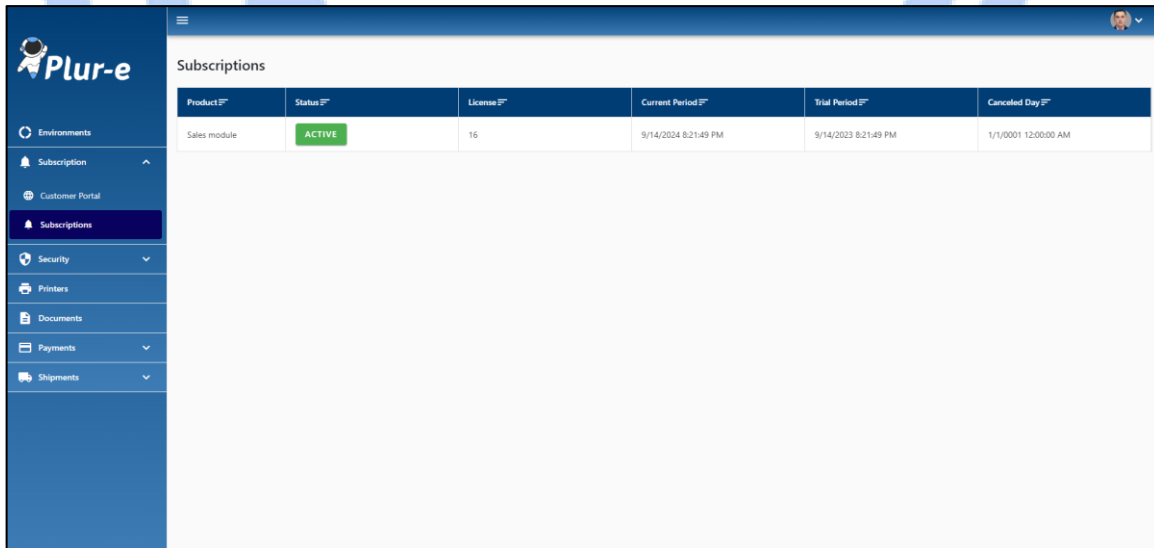
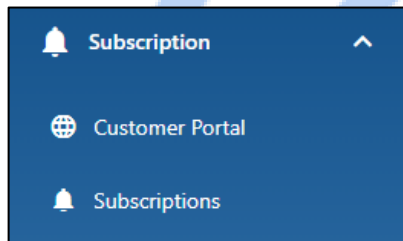


In the Plur-e dashboard we can find the Enviroments, Subscription, Security, Printers, Documents, Payments and Shipments sections.



Subscription

In this section you can find the Customer Portal and the current Plur-e subscription.

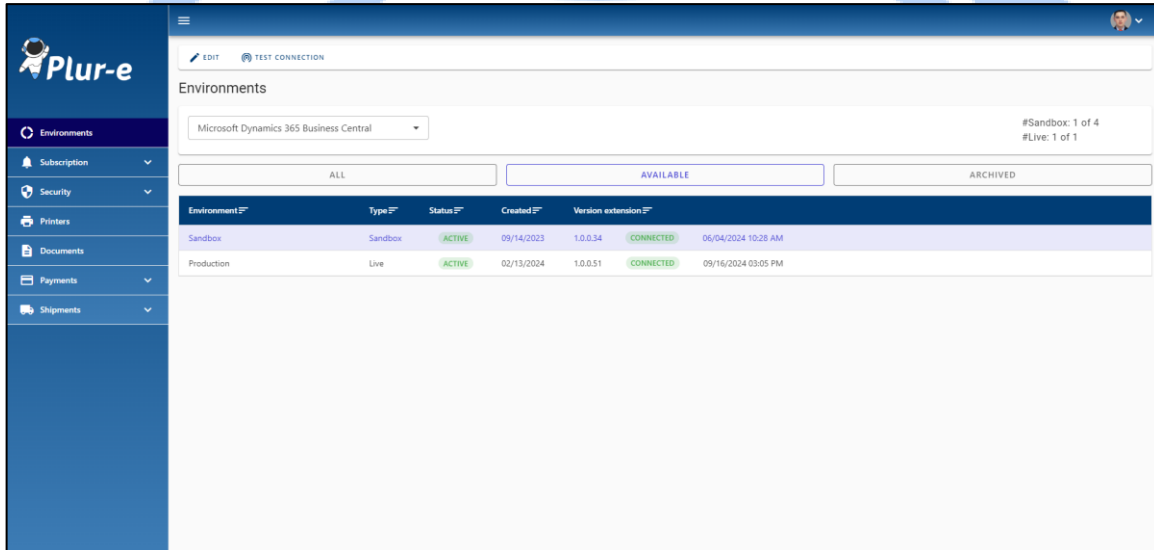


The screenshot shows the Plur-e web application interface. On the left is a dark blue sidebar with the Plur-e logo and a list of menu items: Environments, Subscription (with an upward arrow), Customer Portal, Subscriptions (highlighted with a bell icon), Security (with a downward arrow), Printers, Documents, Payments (with a downward arrow), and Shipments (with a downward arrow). The main content area has a header with the Plur-e logo and a user profile icon. Below the header is a table titled 'Subscriptions'.

Product	Status	License	Current Period	Trial Period	Canceled Day
Sales module	ACTIVE	16	9/14/2024 8:21:49 PM	9/14/2023 8:21:49 PM	1/1/0001 12:00:00 AM

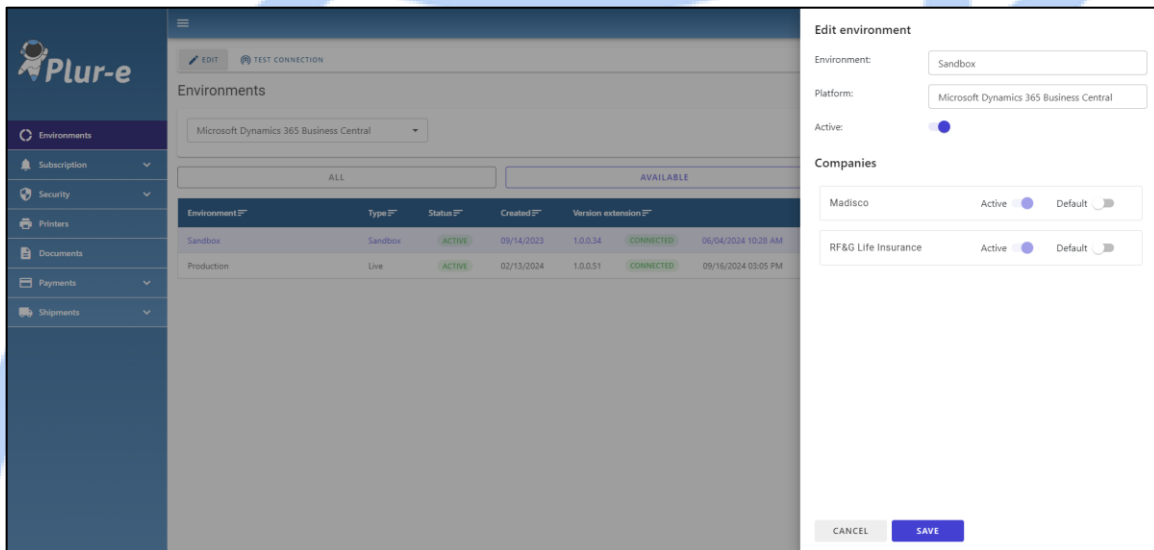
Enviroments

In this section we will see the BC environment previously configured; in this section we will be able to modify aspects of it as well as test the connection to the Business Central extension.



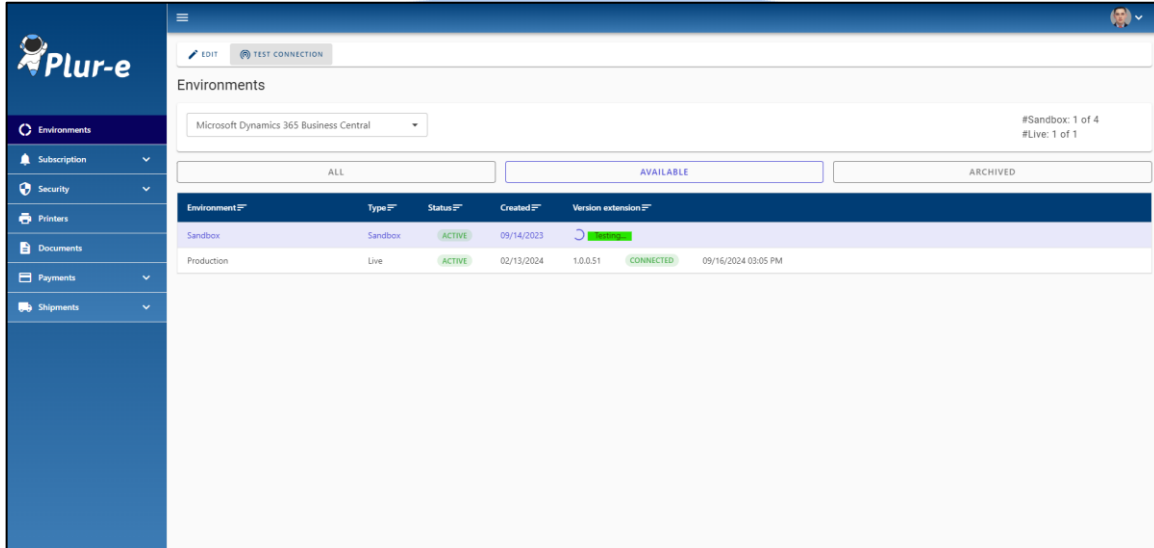
The screenshot shows the 'Environments' page in the Plur-e application. The left sidebar contains navigation links: Environments, Subscription, Security, Printers, Documents, Payments, and Shipments. The main content area displays a table of environments for 'Microsoft Dynamics 365 Business Central'. The table has columns for Environment, Type, Status, Created, Version extension, and a timestamp. Two environments are listed: 'Sandbox' (Type: Sandbox, Status: ACTIVE, Created: 09/14/2023, Version extension: 1.0.0.34, CONNECTED) and 'Production' (Type: Live, Status: ACTIVE, Created: 02/13/2024, Version extension: 1.0.0.51, CONNECTED). Above the table, there are filters for 'ALL', 'AVAILABLE', and 'ARCHIVED'. The top right corner shows '#Sandbox: 1 of 4' and '#Live: 1 of 1'.

Environment	Type	Status	Created	Version extension	
Sandbox	Sandbox	ACTIVE	09/14/2023	1.0.0.34	CONNECTED 06/04/2024 10:28 AM
Production	Live	ACTIVE	02/13/2024	1.0.0.51	CONNECTED 09/16/2024 03:05 PM



The screenshot shows the 'Environments' page with the 'Edit environment' modal open. The modal has fields for 'Environment' (Sandbox), 'Platform' (Microsoft Dynamics 365 Business Central), and 'Active' (checked). Below these fields is a 'Companies' section with two entries: 'Madisco' and 'RF&G Life Insurance'. Each entry has an 'Active' toggle (checked) and a 'Default' toggle (unchecked). At the bottom of the modal are 'CANCEL' and 'SAVE' buttons.

Environment	Type	Status	Created	Version extension	
Sandbox	Sandbox	ACTIVE	09/14/2023	1.0.0.34	CONNECTED 06/04/2024 10:28 AM
Production	Live	ACTIVE	02/13/2024	1.0.0.51	CONNECTED 09/16/2024 03:05 PM

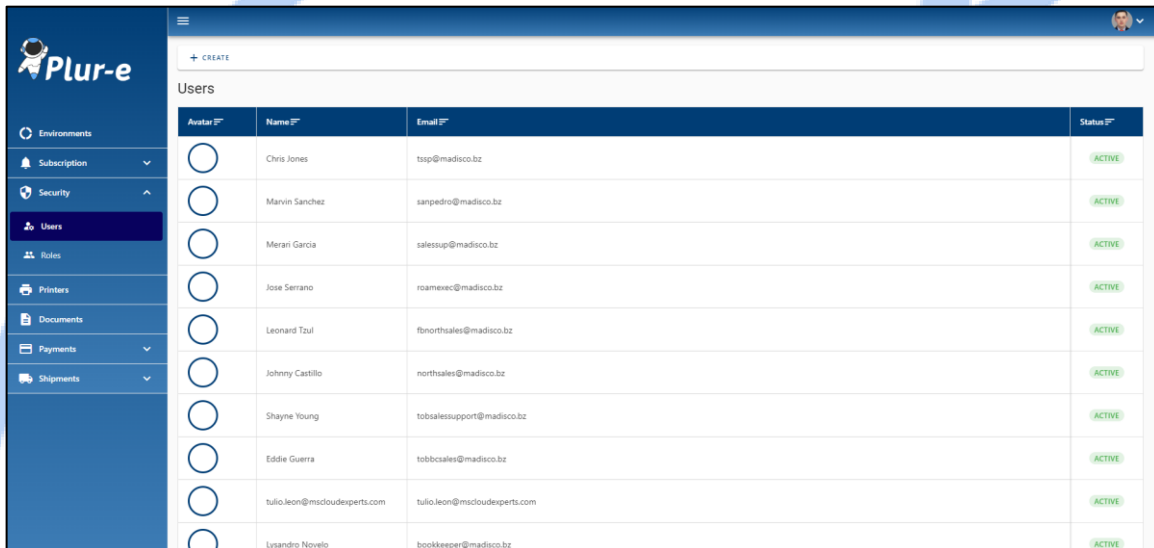


The screenshot shows the 'Environments' section of the Plur-e application. The left sidebar contains navigation links for Environments, Subscription, Security, Printers, Documents, Payments, and Shipments. The main content area displays a table of environments for 'Microsoft Dynamics 365 Business Central'. The table has columns for Environment, Type, Status, Created, Version extension, and a final column for details. Two environments are listed: 'Sandbox' (Type: Sandbox, Status: ACTIVE, Created: 09/14/2023) and 'Production' (Type: Live, Status: ACTIVE, Created: 02/13/2024). The Production environment is also marked as 'CONNECTED' with a timestamp of 09/16/2024 03:05 PM.

Environment	Type	Status	Created	Version extension	
Sandbox	Sandbox	ACTIVE	09/14/2023	1.0.0.51	
Production	Live	ACTIVE	02/13/2024	1.0.0.51	CONNECTED 09/16/2024 03:05 PM

Security

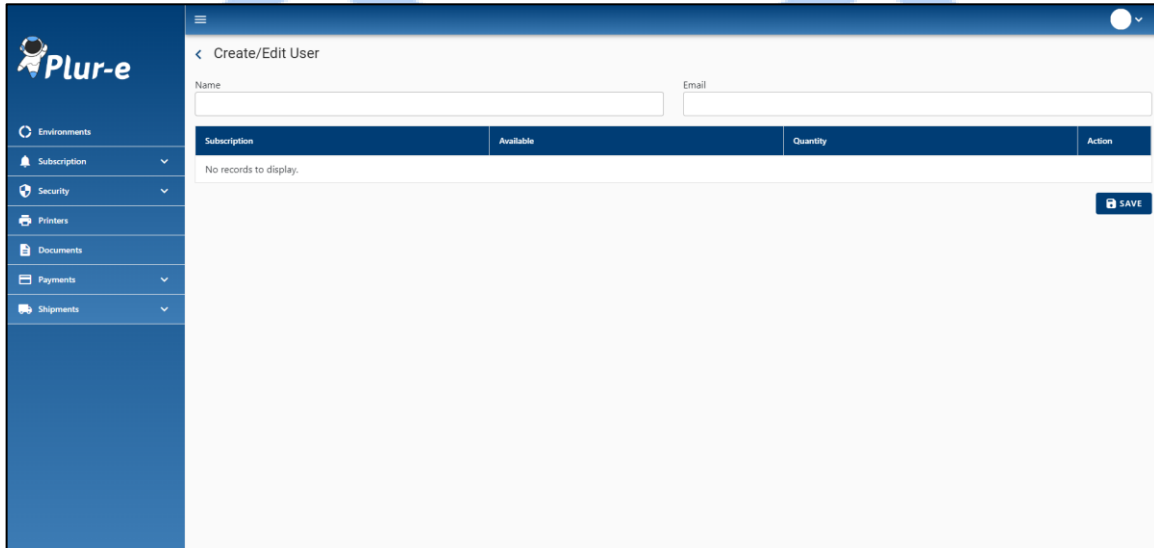
In the security section we can manage the users that will enter the mobile App, being able to configure the permissions, as well as their roles and salesperson that they have associated.



The screenshot shows the 'Users' section of the Plur-e application. The left sidebar contains navigation links for Environments, Subscription, Security, Users, Roles, Printers, Documents, Payments, and Shipments. The main content area displays a table of users. The table has columns for Avatar, Name, Email, and Status. Ten users are listed, all with a status of 'ACTIVE'.

Avatar	Name	Email	Status
	Chris Jones	tsjp@madisco.bz	ACTIVE
	Marvin Sanchez	sampedro@madisco.bz	ACTIVE
	Merari Garcia	salesup@madisco.bz	ACTIVE
	Jose Serrano	roamevec@madisco.bz	ACTIVE
	Leonard Tzul	fbnorthsales@madisco.bz	ACTIVE
	Johnny Castillo	northsales@madisco.bz	ACTIVE
	Shayne Young	tobsalesupport@madisco.bz	ACTIVE
	Eddie Guerra	tobbcsales@madisco.bz	ACTIVE
	tulio.leon@mscloudexperts.com	tulio.leon@mscloudexperts.com	ACTIVE
	Lisandro Novelo	bookkeeper@madisco.bz	ACTIVE

Create a new user



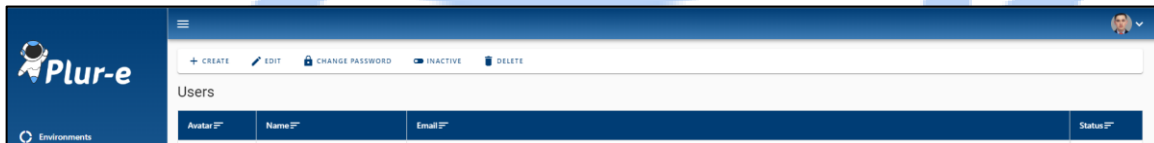
< Create/Edit User

Name Email

Subscription	Available	Quantity	Action
No records to display.			

SAVE

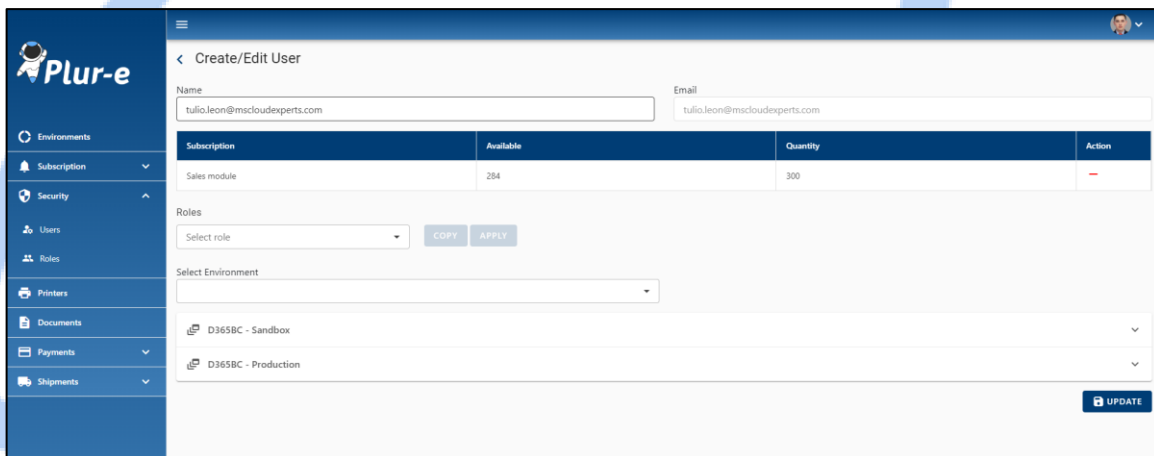
You can also reset passwords, edit and activate or deactivate users, even delete them.



+ CREATE EDIT CHANGE PASSWORD INACTIVE DELETE

Users

Avatar	Name	Email	Status
--------	------	-------	--------



< Create/Edit User

Name Email

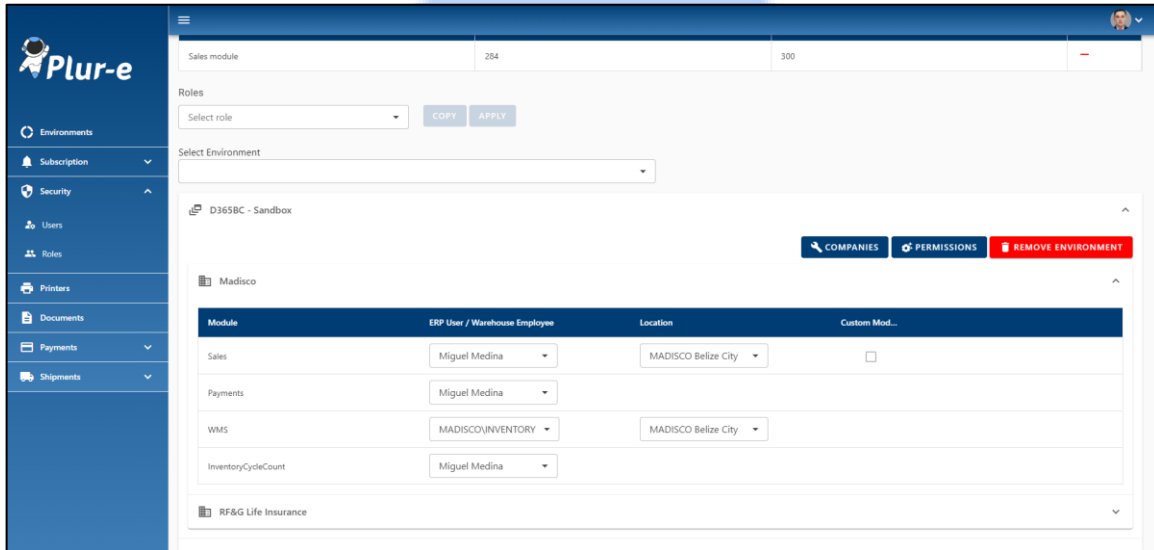
Subscription	Available	Quantity	Action
Sales module	284	300	-

Roles
Select role **COPY** **APPLY**

Select Environment

☐ D365BC - Sandbox
☐ D365BC - Production

UPDATE

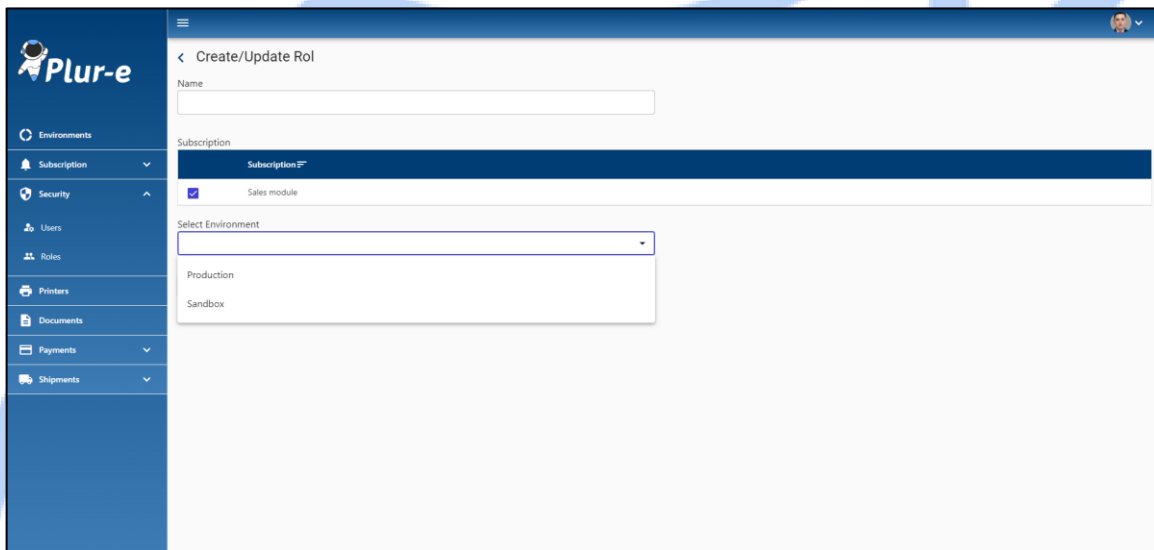


The screenshot shows the 'Roles' configuration page in the Plur-e system. The left sidebar contains navigation links: Environments, Subscription, Security, Users, Roles, Printers, Documents, Payments, and Shipments. The main content area is titled 'Roles' and includes a 'Select role' dropdown, 'COPY' and 'APPLY' buttons, and a 'Select Environment' dropdown. Below this, a table lists roles for the 'D365BC - Sandbox' environment. The table has columns for 'Module', 'ERP User / Warehouse Employee', 'Location', and 'Custom Mod...'. The roles listed are 'Sales', 'Payments', 'WMS', and 'InventoryCycleCount'. The 'Sales' role is assigned to 'Miguel Medina' and 'MADISCO Belize City'. The 'Payments' role is assigned to 'Miguel Medina'. The 'WMS' role is assigned to 'MADISCOINVENTORY' and 'MADISCO Belize City'. The 'InventoryCycleCount' role is assigned to 'Miguel Medina'. At the bottom, there is a section for 'RF&G Life Insurance'.

Module	ERP User / Warehouse Employee	Location	Custom Mod...
Sales	Miguel Medina	MADISCO Belize City	<input type="checkbox"/>
Payments	Miguel Medina		
WMS	MADISCOINVENTORY	MADISCO Belize City	
InventoryCycleCount	Miguel Medina		

Role Creation

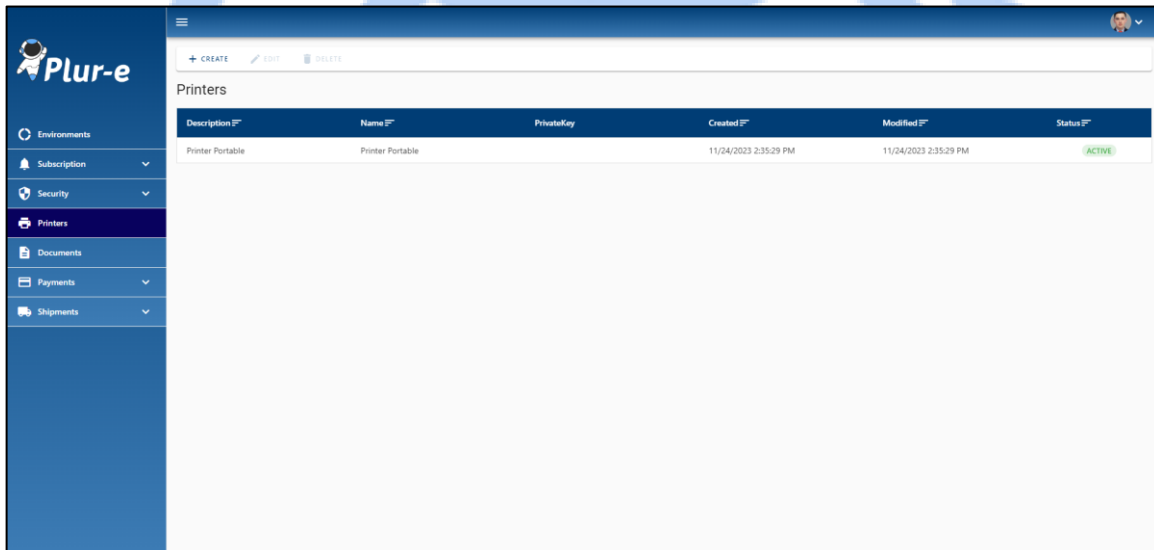
In this section you can also create roles for specific environments.



The screenshot shows the 'Create/Update Role' page in the Plur-e system. The left sidebar is the same as the previous screenshot. The main content area is titled 'Create/Update Rol' and includes a 'Name' input field, a 'Subscription' dropdown, and a 'Select Environment' dropdown. The 'Subscription' dropdown is set to 'SubscriptionE' and shows a list of subscriptions, including 'Sales module'. The 'Select Environment' dropdown is set to 'Production' and shows a list of environments, including 'Sandbox'.

Printers

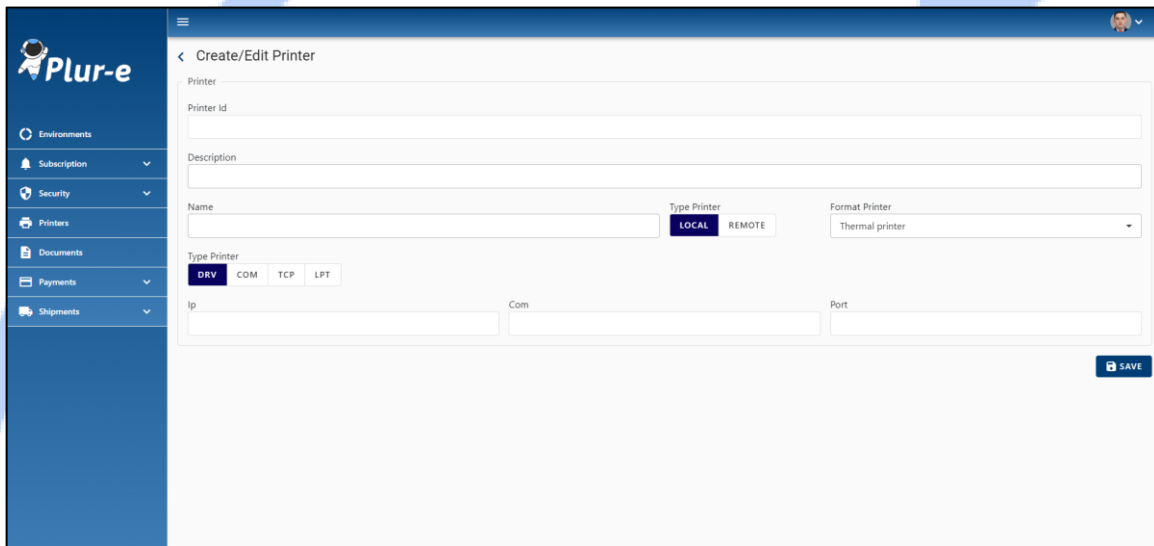
In the printers section you can create, edit and delete the printers linked to the mobile device to print reports exclusive to Plur-e.



The screenshot shows the Plur-e interface with the 'Printers' section selected in the sidebar. The main area displays a table with the following data:

Description IP	Name IP	PrivateKey	Created IP	Modified IP	Status IP
Printer Portable	Printer Portable		11/24/2023 2:35:29 PM	11/24/2023 2:35:29 PM	ACTIVE

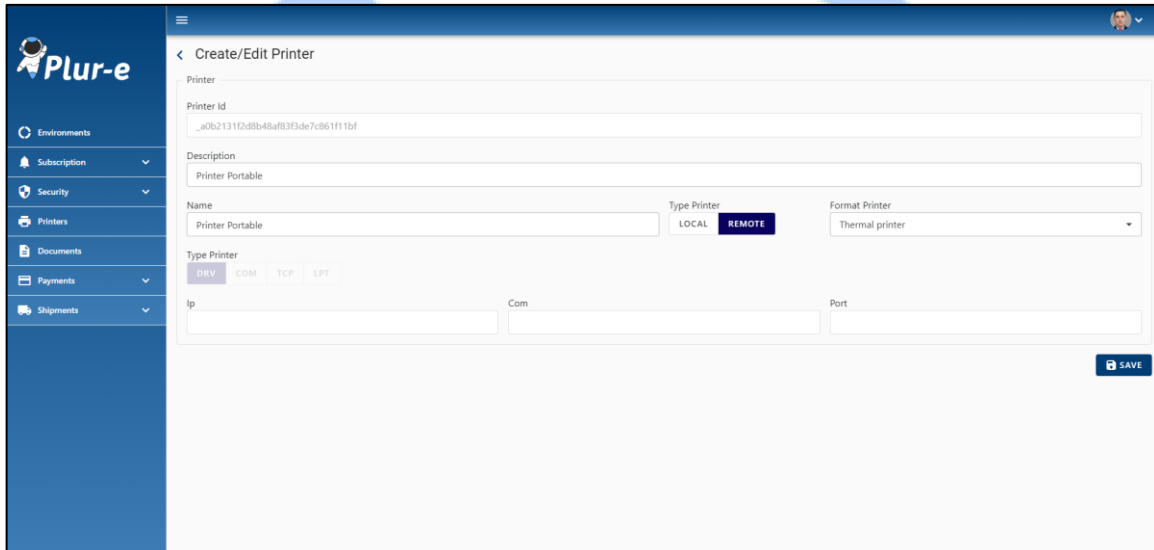
Create a new printer



The screenshot shows the 'Create/Edit Printer' form in the Plur-e interface. The form includes the following fields and options:

- Printer Id**: Text input field.
- Description**: Text input field.
- Name**: Text input field.
- Type Printer**: Radio buttons for **LOCAL** (selected) and **REMOTE**.
- Format Printer**: Dropdown menu with 'Thermal printer' selected.
- Type Printer**: Radio buttons for **DRV** (selected), **COM**, **TCP**, and **LPT**.
- Ip**: Text input field.
- Com**: Text input field.
- Port**: Text input field.
- SAVE**: Button at the bottom right.

Edit a printer



Create/Edit Printer

Printer

Printer Id
_a0b21312cd8b48af83f3de7c861f11bf

Description
Printer Portable

Name
Printer Portable

Type Printer
LOCAL REMOTE

Format Printer
Thermal printer

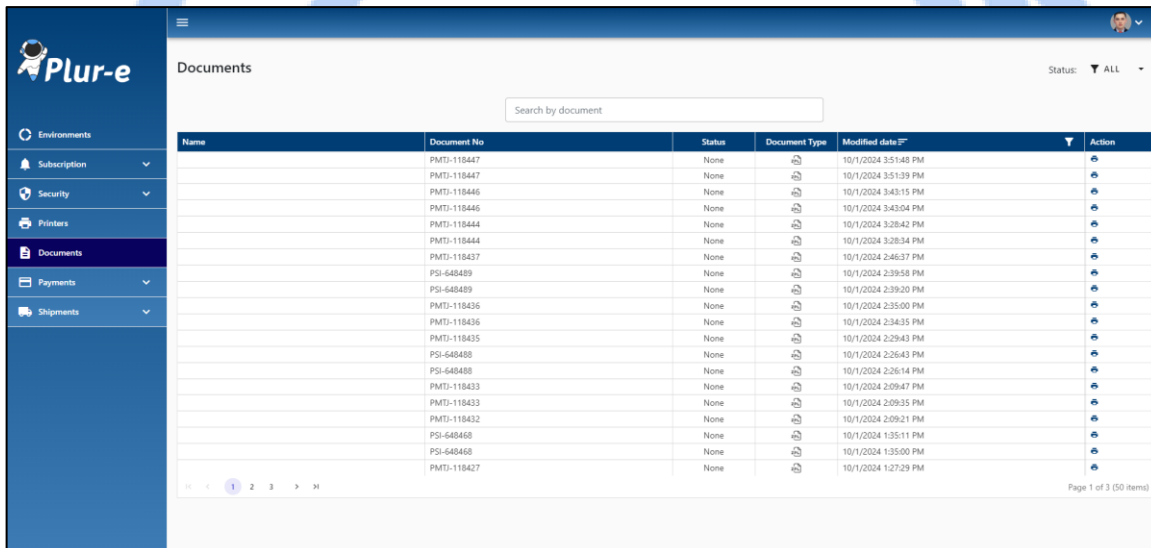
Type Printer
DRV COM TCP LPT

Ip Com Port

SAVE

Documents

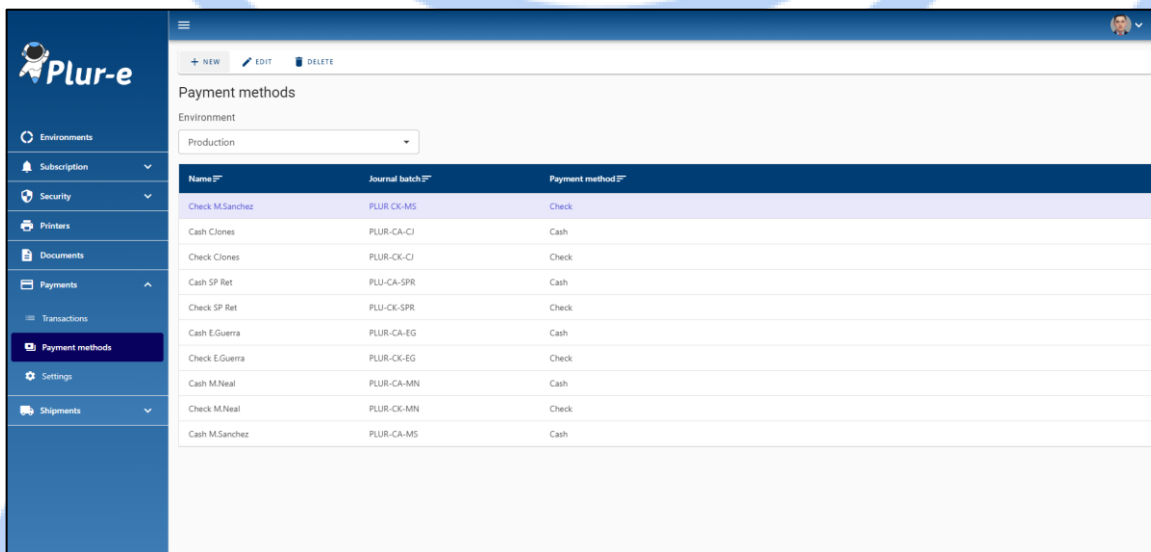
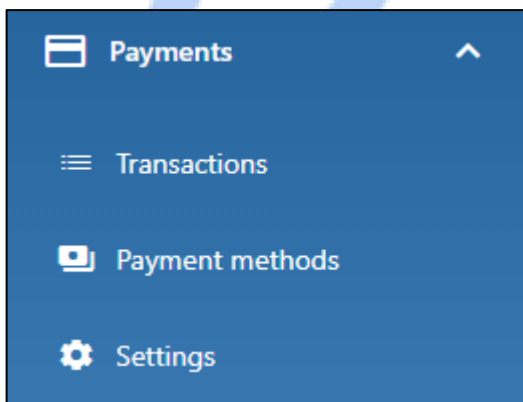
In the documents section you can view a history of the documents printed by the device, as well as view them in their original extension and print them.



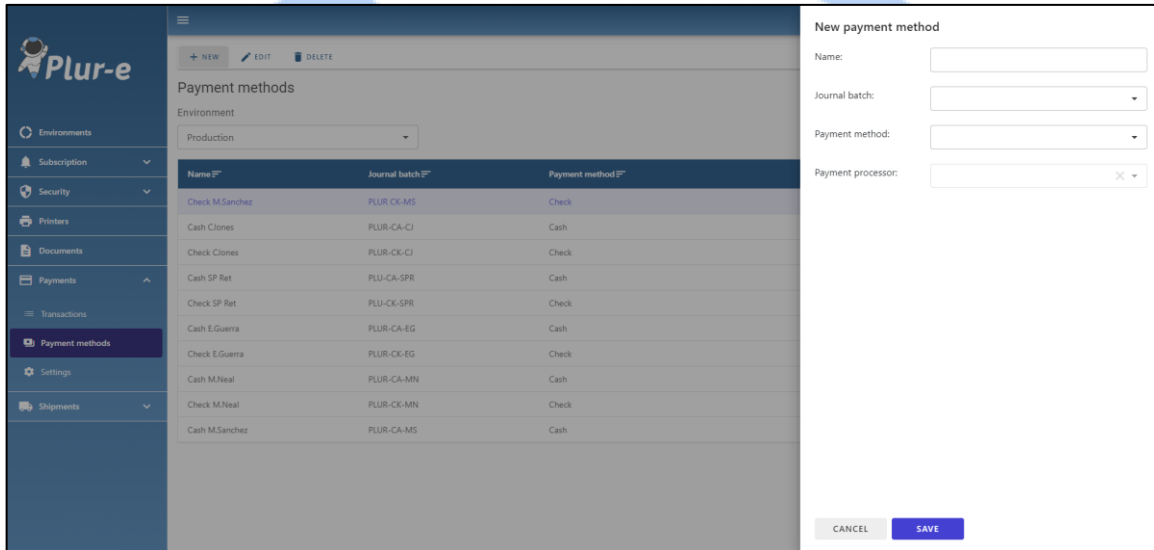
Name	Document No	Status	Document Type	Modified date	Action
	PMTJ-118447	None		10/1/2024 3:51:48 PM	
	PMTJ-118447	None		10/1/2024 3:51:39 PM	
	PMTJ-118446	None		10/1/2024 3:43:15 PM	
	PMTJ-118446	None		10/1/2024 3:43:04 PM	
	PMTJ-118444	None		10/1/2024 3:28:42 PM	
	PMTJ-118444	None		10/1/2024 3:28:34 PM	
	PMTJ-118437	None		10/1/2024 2:46:37 PM	
	PSI-648489	None		10/1/2024 2:39:58 PM	
	PSI-648489	None		10/1/2024 2:39:20 PM	
	PMTJ-118436	None		10/1/2024 2:35:00 PM	
	PMTJ-118436	None		10/1/2024 2:34:35 PM	
	PMTJ-118435	None		10/1/2024 2:29:43 PM	
	PSI-648488	None		10/1/2024 2:26:43 PM	
	PSI-648488	None		10/1/2024 2:26:14 PM	
	PMTJ-118433	None		10/1/2024 2:09:47 PM	
	PMTJ-118433	None		10/1/2024 2:09:35 PM	
	PMTJ-118432	None		10/1/2024 2:09:21 PM	
	PSI-648468	None		10/1/2024 1:35:11 PM	
	PSI-648468	None		10/1/2024 1:35:00 PM	
	PMTJ-118427	None		10/1/2024 1:27:29 PM	

Payments

In the Payments section you can create, edit or delete payment methods, which must be equivalent to the Batches created in the General Journal Batches of Business Central.



Payment method creation



New payment method

Name:

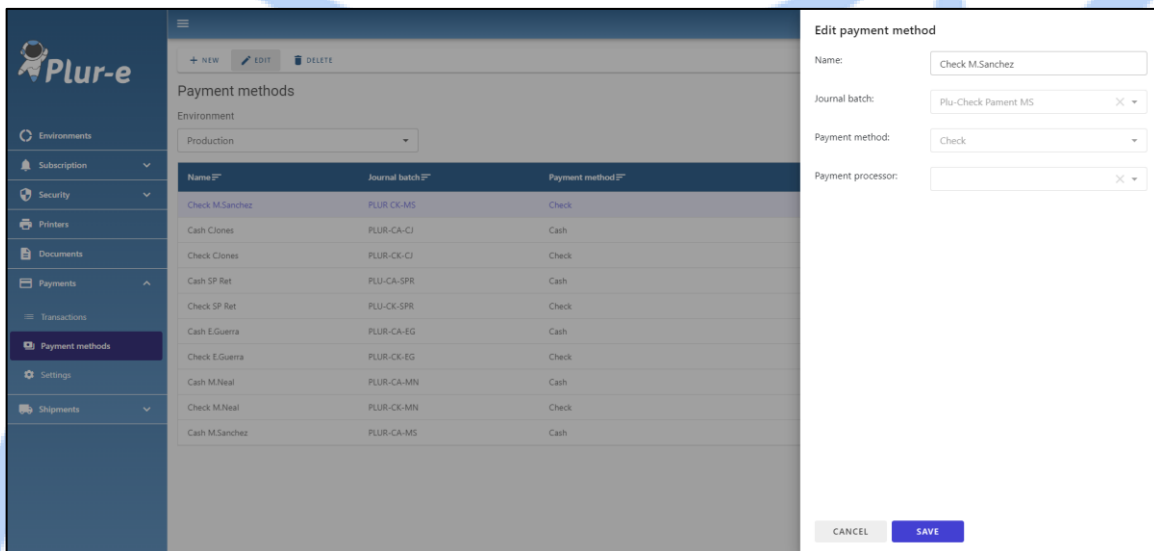
Journal batch:

Payment method:

Payment processor:

Name	Journal batch	Payment method
Check M.Sanchez	PLUR-CK-MS	Check
Cash Clones	PLUR-CA-CJ	Cash
Check Clones	PLUR-CK-CJ	Check
Cash SP Ret	PLU-CA-SPR	Cash
Check SP Ret	PLU-CK-SPR	Check
Cash E.Guerra	PLUR-CA-EG	Cash
Check E.Guerra	PLUR-CK-EG	Check
Cash M.Neal	PLUR-CA-MN	Cash
Check M.Neal	PLUR-CK-MN	Check
Cash M.Sanchez	PLUR-CA-MS	Cash

Edit payment method



Edit payment method

Name:

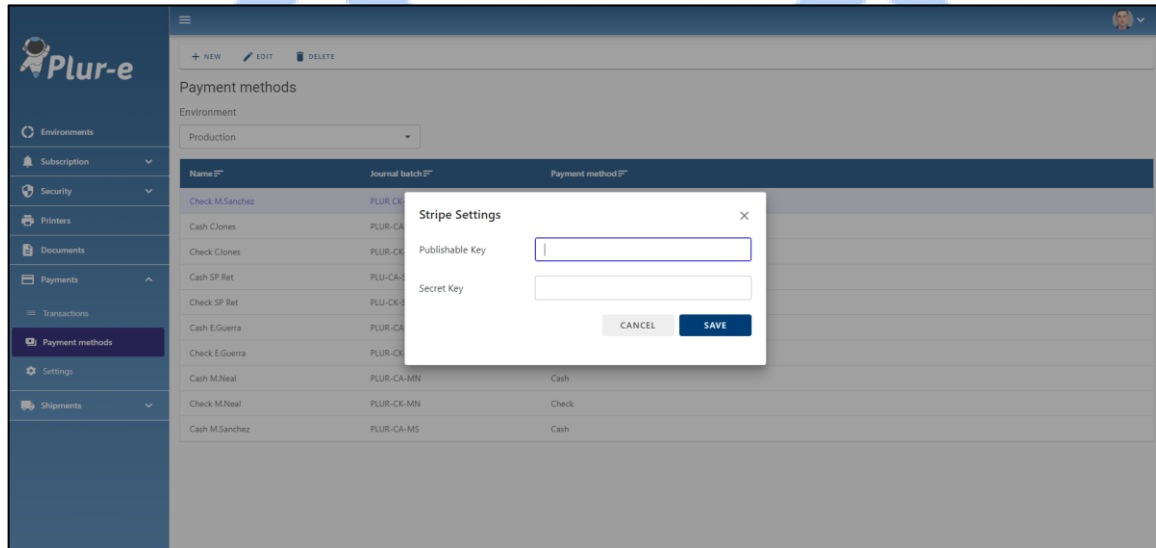
Journal batch:

Payment method:

Payment processor:

Name	Journal batch	Payment method
Check M.Sanchez	PLUR-CK-MS	Check
Cash Clones	PLUR-CA-CJ	Cash
Check Clones	PLUR-CK-CJ	Check
Cash SP Ret	PLU-CA-SPR	Cash
Check SP Ret	PLU-CK-SPR	Check
Cash E.Guerra	PLUR-CA-EG	Cash
Check E.Guerra	PLUR-CK-EG	Check
Cash M.Neal	PLUR-CA-MN	Cash
Check M.Neal	PLUR-CK-MN	Check
Cash M.Sanchez	PLUR-CA-MS	Cash

In this section you can also configure the keys necessary for Plure to correctly link to the Stripe payment platform.



Shipments

En la seccion de Shipments se puede ver las ultimas transacciones realizadas y el settings para configurar el api de Ship Satation,

