

Installation and Configuration of the Plur-E extension

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.

Prerequisites to install the Plur-e extension in Business Central

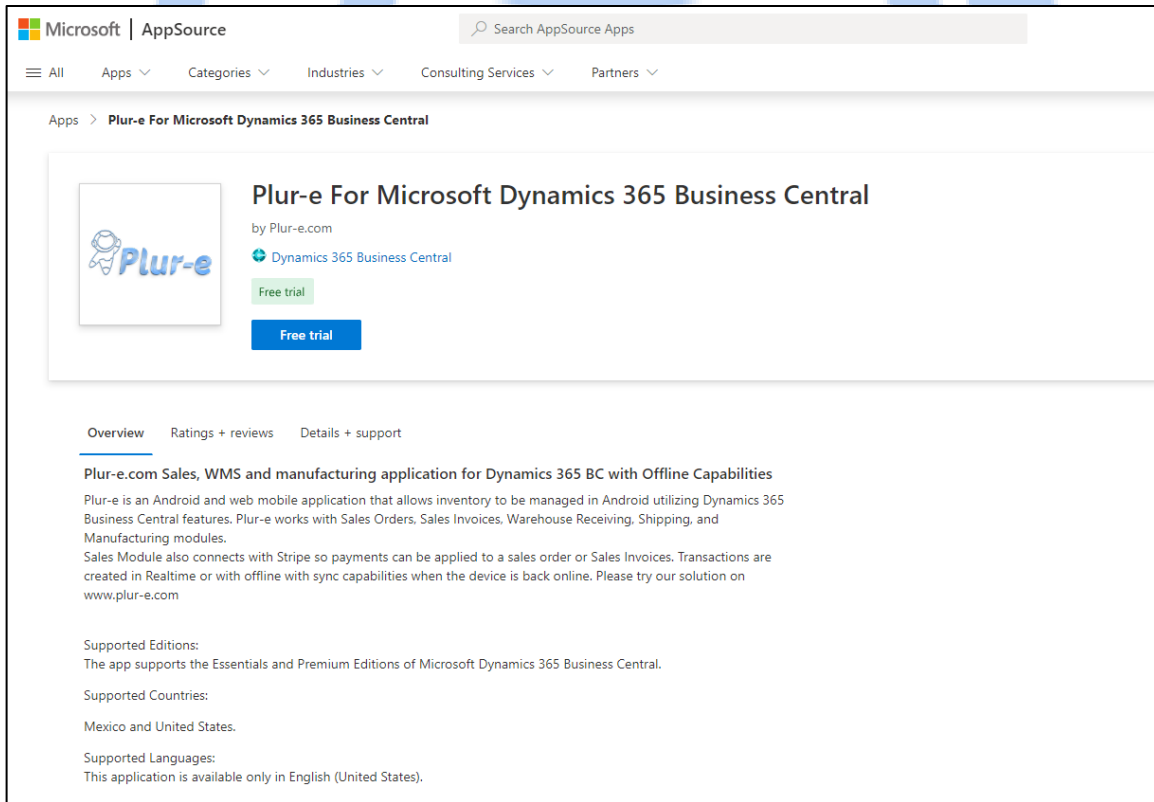
Listed below are the prerequisites needed to install and configure the Plur-e extension, as well as how to configure your Plur-E web command and control center.

- Dynamics 365 Business Central production environment or Sandbox to install the extension.
- Global administrator user of all the companies configured in Business Central.
- Android device on which Plur-E Mobile will be installed.

Note: See [Appendix A](#) for how to set global administrator permissions on a Dynamics 365 Business Central user.

Installation of the Plur-E extension in Business Central

Microsoft [AppSource](#) searched for Plur-E extension for Business Central




The screenshot shows the Microsoft AppSource interface. At the top, there's a search bar and navigation links for All, Apps, Categories, Industries, Consulting Services, and Partners. The main heading is "Apps > Plur-e For Microsoft Dynamics 365 Business Central". Below this, the app card for "Plur-e For Microsoft Dynamics 365 Business Central" is displayed, created by Plur-e.com. It features the Plur-e logo, a "Free trial" button, and a "Dynamics 365 Business Central" tag. Below the app card, there are tabs for Overview, Ratings + reviews, and Details + support. The Overview tab is selected, showing a description of the app as a Sales, WMS, and manufacturing application for Dynamics 365 BC with offline capabilities. It mentions that the app works with Sales Orders, Sales Invoices, Warehouse Receiving, Shipping, and Manufacturing modules, and also connects with Stripe for payments. It also lists supported editions (Essentials and Premium), countries (Mexico and United States), and languages (English (United States)).

Microsoft | AppSource


Search AppSource Apps

All Apps Categories Industries Consulting Services Partners

Apps > Plur-e For Microsoft Dynamics 365 Business Central

 **Plur-e For Microsoft Dynamics 365 Business Central**

by Plur-e.com

 Dynamics 365 Business Central

Free trial

Free trial

Overview Ratings + reviews Details + support

Plur-e.com Sales, WMS and manufacturing application for Dynamics 365 BC with Offline Capabilities

Plur-e is an Android and web mobile application that allows inventory to be managed in Android utilizing Dynamics 365 Business Central features. Plur-e works with Sales Orders, Sales Invoices, Warehouse Receiving, Shipping, and Manufacturing modules.

Sales Module also connects with Stripe so payments can be applied to a sales order or Sales Invoices. Transactions are created in Realtime or with offline with sync capabilities when the device is back online. Please try our solution on www.plur-e.com

Supported Editions:
The app supports the Essentials and Premium Editions of Microsoft Dynamics 365 Business Central.

Supported Countries:
Mexico and United States.


Supported Languages:
This application is available only in English (United States).

Enter the account from which you want to acquire the extension (remember to have a user with global administrator permissions for an efficient installation and configuration).

×

Sign in to Microsoft AppSource

Enter the email address of the account you want to use when acquiring apps on AppSource.

 The app you have selected (Plur-e For Microsoft Dynamics 365 Business Central) requires a work or school account to continue. Microsoft accounts are not supported for this app.

Work or school account

Sign in

Don't have an account? [Sign up for a free account](#)

Note: If you do not know how to configure a user with global administrator permissions, see [Appendix A](#) for more information.

After this, select the environment in which the extension will be installed.

Dynamics 365 Business Central×

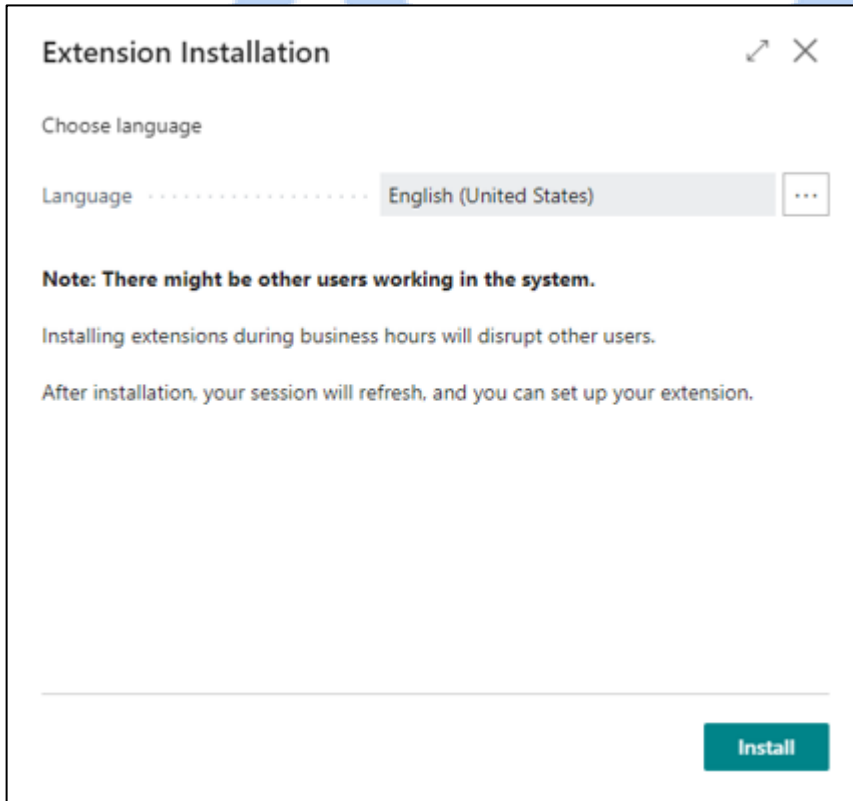
We see that you have more than one environment available. Select the environment that you want to access.

☒ Production

☐ Sandbox

Instalar

Once you have selected the environment in which the Plur-E extension will be installed, follow the steps given by Business Central to install it.



Extension Installation

Choose language

Language English (United States) ...

Note: There might be other users working in the system.

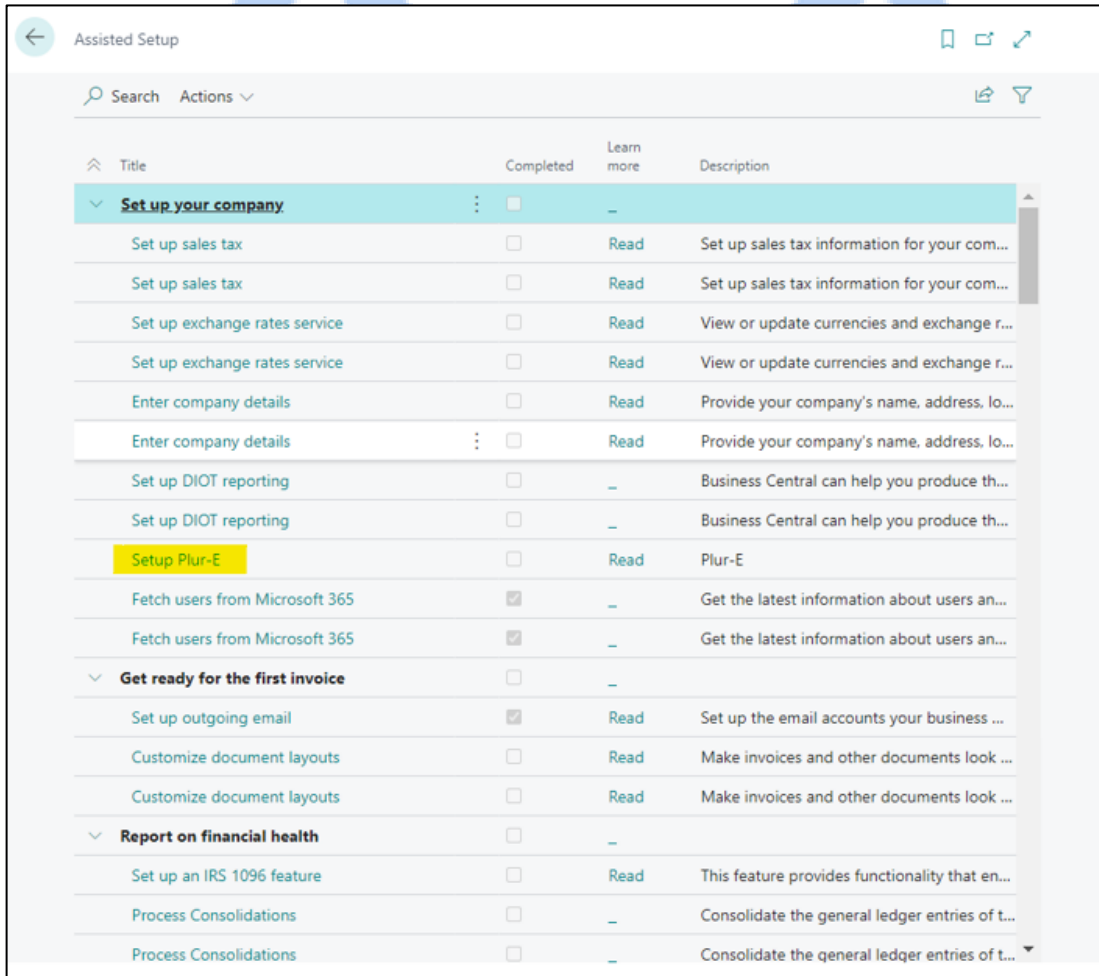
Installing extensions during business hours will disrupt other users.

After installation, your session will refresh, and you can set up your extension.

Install

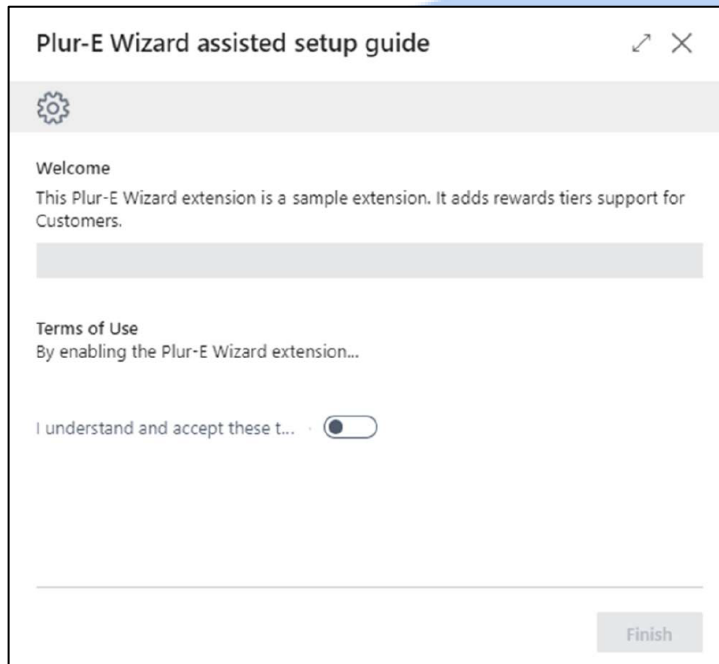
Note: Keep in mind that, when installing an extension, Business Central will interrupt the sessions of all users who are using the environment.

Once the Plur-E extension is installed, go to the Business Central page called Assisted Setup and select Plur-E Setup to open the Plur-E Wizard and configure it.

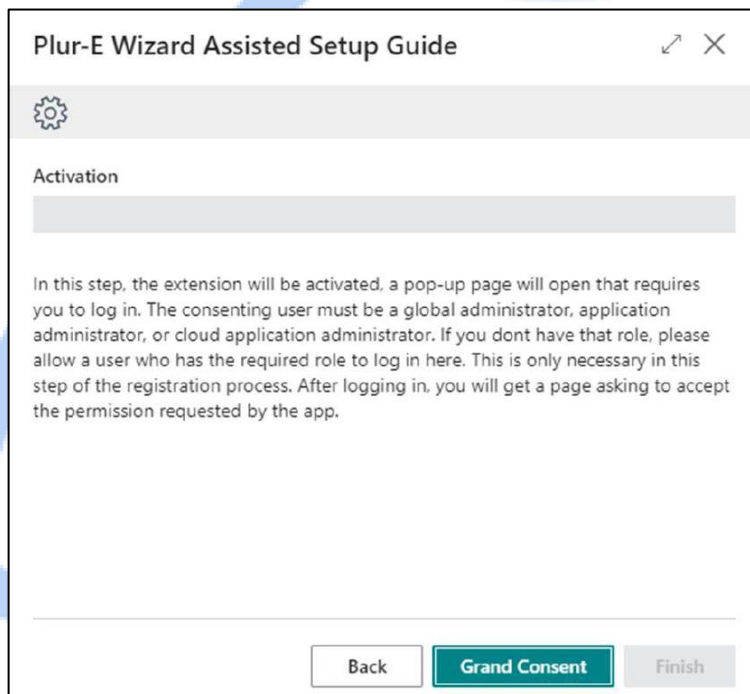


Title	Completed	Learn more	Description
Set up your company	<input type="checkbox"/>	—	
Set up sales tax	<input type="checkbox"/>	Read	Set up sales tax information for your com...
Set up sales tax	<input type="checkbox"/>	Read	Set up sales tax information for your com...
Set up exchange rates service	<input type="checkbox"/>	Read	View or update currencies and exchange r...
Set up exchange rates service	<input type="checkbox"/>	Read	View or update currencies and exchange r...
Enter company details	<input type="checkbox"/>	Read	Provide your company's name, address, lo...
Enter company details	<input type="checkbox"/>	Read	Provide your company's name, address, lo...
Set up DIOT reporting	<input type="checkbox"/>	—	Business Central can help you produce th...
Set up DIOT reporting	<input type="checkbox"/>	—	Business Central can help you produce th...
Setup Plur-E	<input type="checkbox"/>	Read	Plur-E
Fetch users from Microsoft 365	<input checked="" type="checkbox"/>	—	Get the latest information about users an...
Fetch users from Microsoft 365	<input checked="" type="checkbox"/>	—	Get the latest information about users an...
Get ready for the first invoice	<input type="checkbox"/>	—	
Set up outgoing email	<input checked="" type="checkbox"/>	Read	Set up the email accounts your business ...
Customize document layouts	<input type="checkbox"/>	Read	Make invoices and other documents look ...
Customize document layouts	<input type="checkbox"/>	Read	Make invoices and other documents look ...
Report on financial health	<input type="checkbox"/>	—	
Set up an IRS 1096 feature	<input type="checkbox"/>	Read	This feature provides functionality that en...
Process Consolidations	<input type="checkbox"/>	—	Consolidate the general ledger entries of t...
Process Consolidations	<input type="checkbox"/>	—	Consolidate the general ledger entries of t...

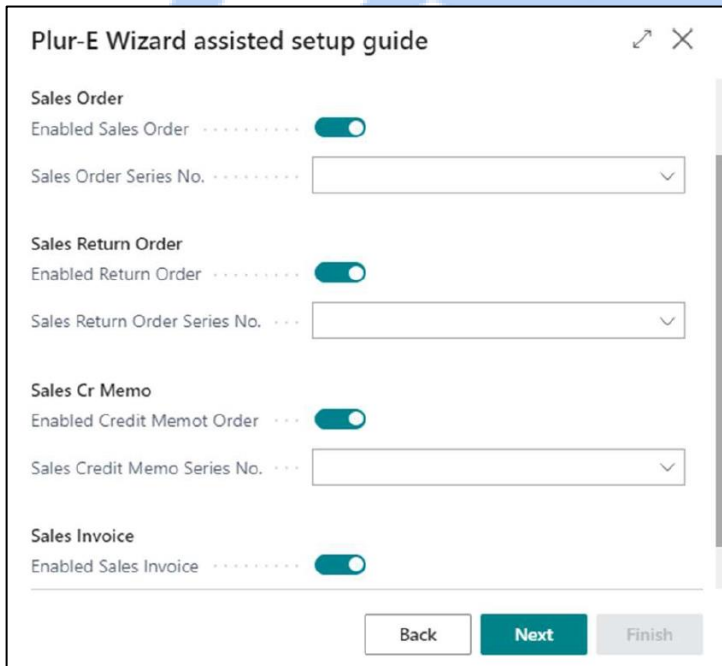
This will open the Plur-E Wizard, follow the terms and conditions.



The next step will open the Azure Active Directory application of Business Central that will allow us to grant the necessary permissions to Plur-E. Within the window that appears next click on Great Consent.



Once the extension is activated, the wizard will allow you to configure the document series that Plur-E can use in the Mobile Application. This list of series will be "Preselected" according to the modules purchased on the Plur-E portal.

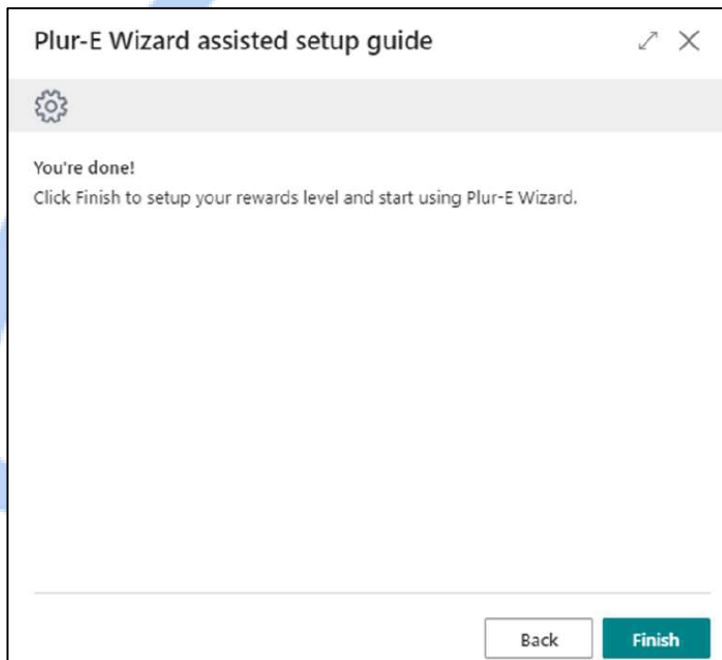


The image shows a configuration window titled "Plur-E Wizard assisted setup guide". It contains four sections, each with a toggle switch and a dropdown menu for series numbers:

- Sales Order**: Enabled Sales Order (toggle on), Sales Order Series No. (dropdown)
- Sales Return Order**: Enabled Return Order (toggle on), Sales Return Order Series No. (dropdown)
- Sales Cr Memo**: Enabled Credit Memo Order (toggle on), Sales Credit Memo Series No. (dropdown)
- Sales Invoice**: Enabled Sales Invoice (toggle on)

At the bottom, there are three buttons: "Back", "Next" (highlighted in green), and "Finish".

By clicking the Next button, you have finished configuring the Plur-E extension.

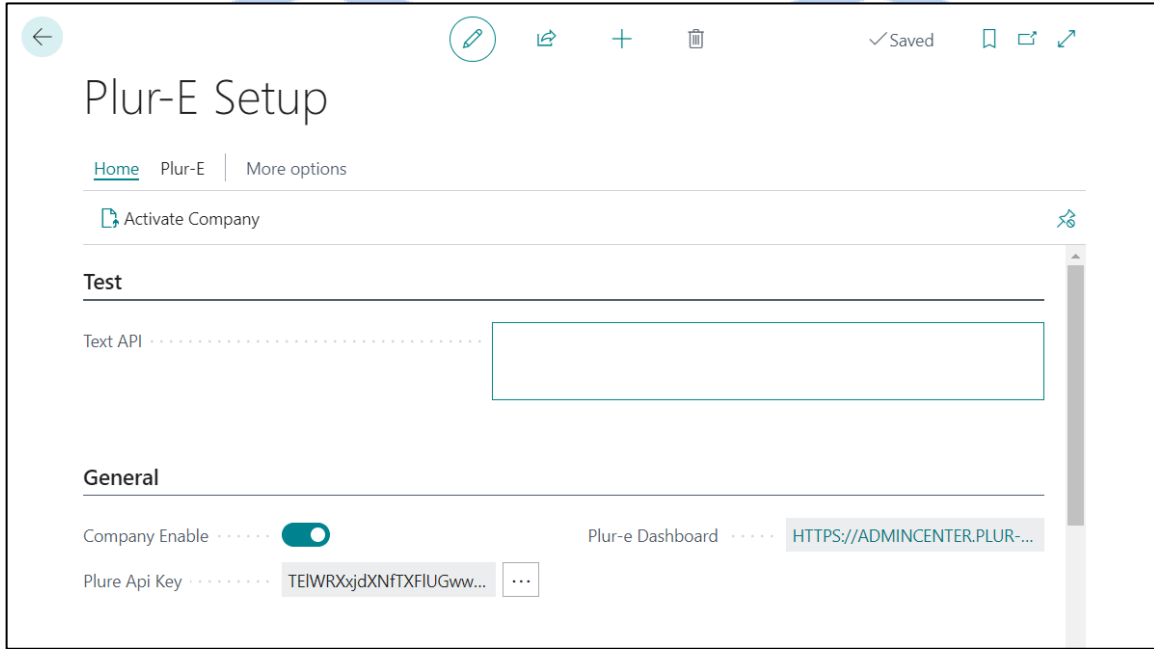


The image shows the completion screen of the "Plur-E Wizard assisted setup guide". It features a gear icon and the following text:

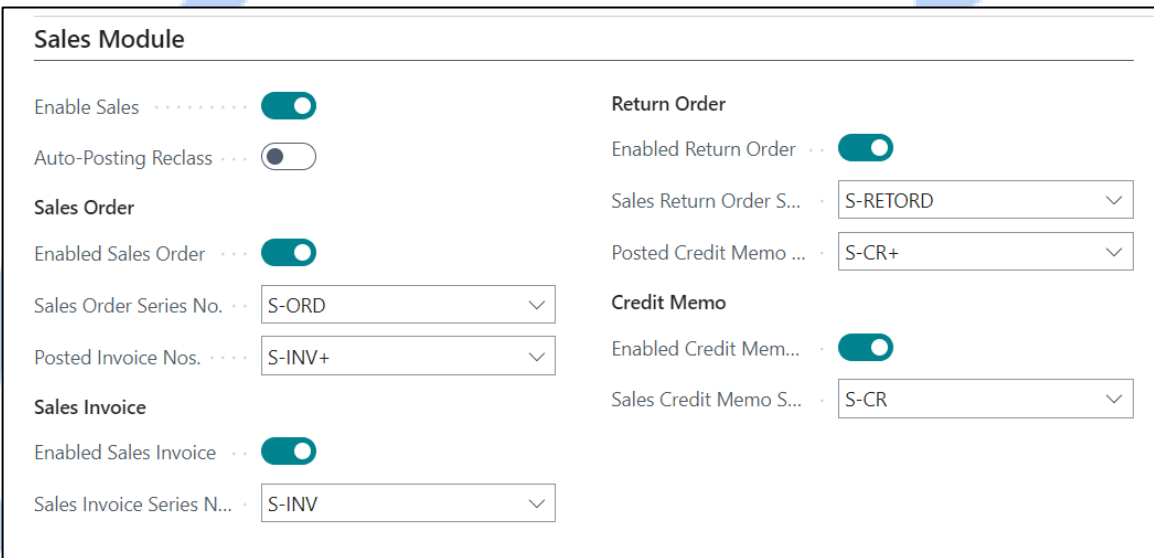
You're done!
Click Finish to setup your rewards level and start using Plur-E Wizard.

At the bottom, there are two buttons: "Back" and "Finish" (highlighted in green).

If you search in the Business Central search engine for the Plur-E Setup page, you will see all the settings and the link to the Plur-E web administration portal.



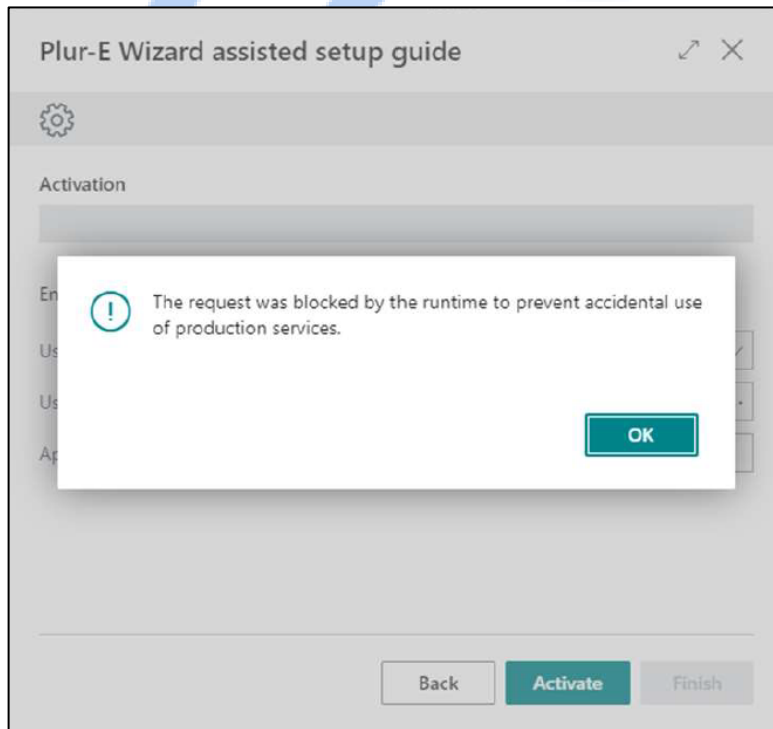
Here you can also configure the modules you have subscribed and configured, for example, Sales Module.



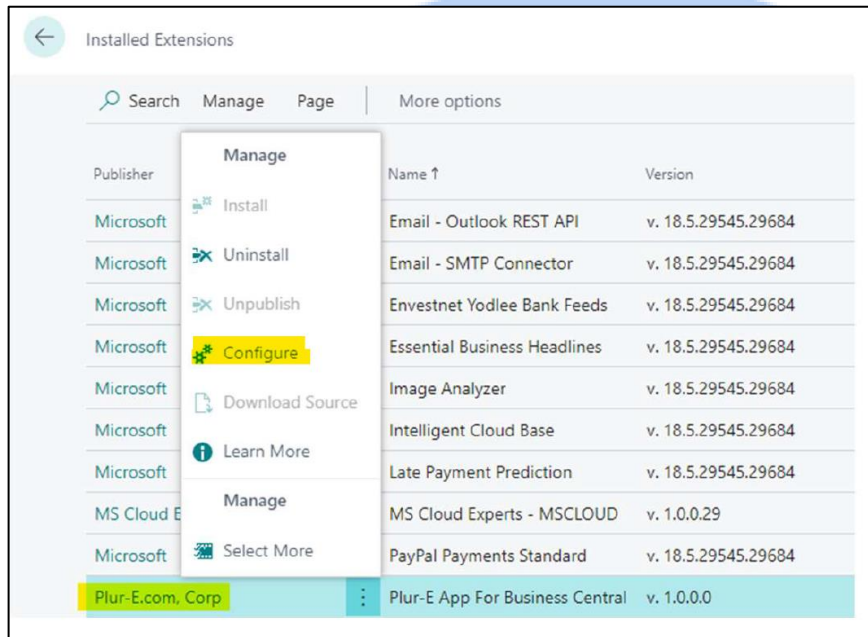
Other aspects to consider during installation.

Aspect 1.

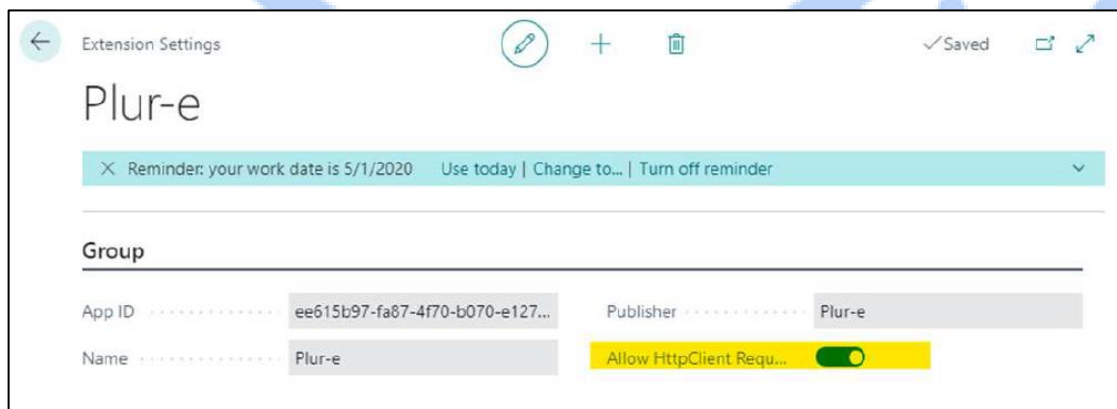
If you get the following message



Go to the central business **Extensions Manager** page and select the Plur-E extension and select the configure option.

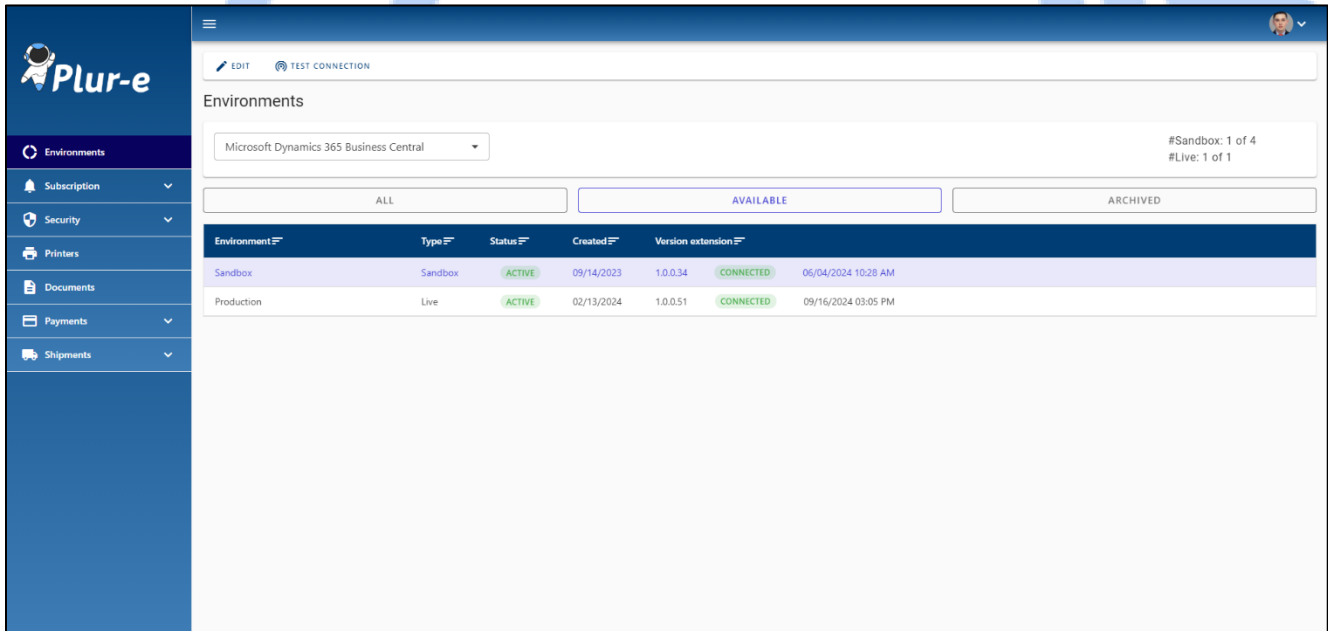


Once in this section we must activate the check called "Allow HttpClient Requests".



Aspect 2

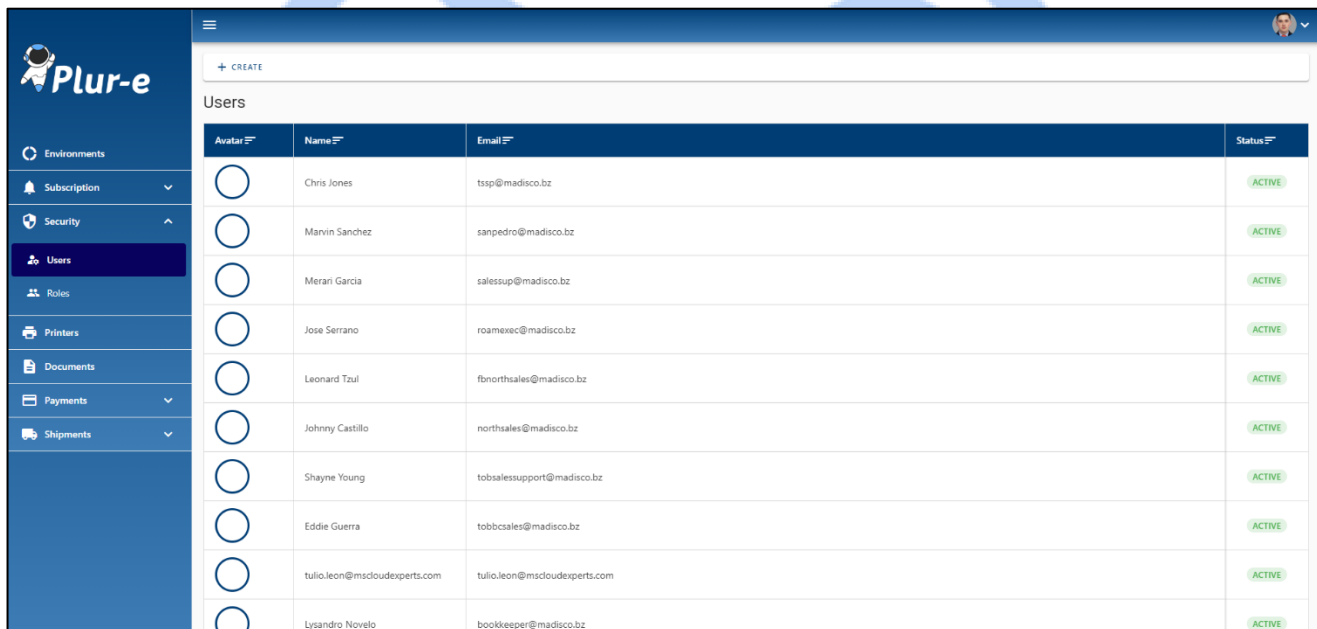
Once the installation of the Plur-E extension is finished, the users and environments must be configured in the Plur-E web portal. Once in the Plur-E web portal in the **Environments** section you can configure the Business Central environments that have the Plur-E extension installed and configured.



The screenshot shows the Plur-E web portal interface. On the left is a dark blue sidebar with the Plur-e logo and a menu containing: Environments, Subscription, Security, Printers, Documents, Payments, and Shipments. The main content area is titled 'Environments' and features a dropdown menu set to 'Microsoft Dynamics 365 Business Central'. To the right of the dropdown, it displays '#Sandbox: 1 of 4' and '#Live: 1 of 1'. Below this are three filter buttons: 'ALL', 'AVAILABLE' (highlighted in blue), and 'ARCHIVED'. A table lists the environments with columns: Environment, Type, Status, Created, Version extension, and a timestamp. The table contains two rows: 'Sandbox' (Type: Sandbox, Status: ACTIVE, Created: 09/14/2023, Version extension: 1.0.0.34, timestamp: 06/04/2024 10:28 AM) and 'Production' (Type: Live, Status: ACTIVE, Created: 02/13/2024, Version extension: 1.0.0.51, timestamp: 09/16/2024 03:05 PM).

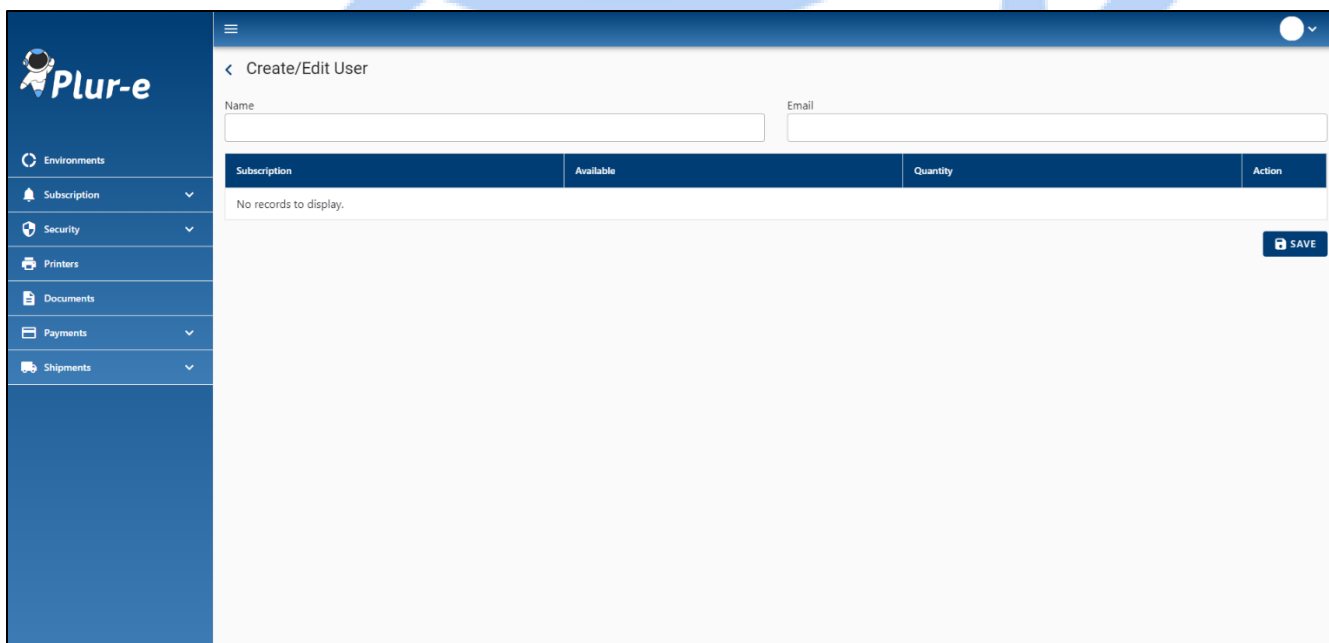
Environment	Type	Status	Created	Version extension	
Sandbox	Sandbox	ACTIVE	09/14/2023	1.0.0.34	06/04/2024 10:28 AM
Production	Live	ACTIVE	02/13/2024	1.0.0.51	09/16/2024 03:05 PM

In the **Users** section we can configure the users that will use the mobile application by configuring their subscriptions and available environments.




The screenshot shows the 'Users' section of the Plur-e application. The left sidebar contains a menu with options: Environments, Subscription, Security, Users (selected), Roles, Printers, Documents, Payments, and Shipments. The main content area displays a table of users with columns: Avatar, Name, Email, and Status. There is a '+ CREATE' button at the top right of the table.

Avatar	Name	Email	Status
	Chris Jones	tssp@madisco.bz	ACTIVE
	Marvin Sanchez	sanpedro@madisco.bz	ACTIVE
	Merari Garcia	salesup@madisco.bz	ACTIVE
	Jose Serrano	roamexec@madisco.bz	ACTIVE
	Leonard Tsul	fbnorthsales@madisco.bz	ACTIVE
	Johnny Castillo	northsales@madisco.bz	ACTIVE
	Shayne Young	tobsalessupport@madisco.bz	ACTIVE
	Eddie Guerra	tobbsales@madisco.bz	ACTIVE
	tulio.leon@mscloudexperts.com	tulio.leon@mscloudexperts.com	ACTIVE
	Lysandro Novelo	bookkeeper@madisco.bz	ACTIVE



The screenshot shows the 'Create/Edit User' form in the Plur-e application. The left sidebar is the same as the previous screenshot. The main content area has a title 'Create/Edit User' and a back arrow. Below the title are input fields for 'Name' and 'Email'. Below these fields is a table with columns: Subscription, Available, Quantity, and Action. The table currently displays 'No records to display.' and a 'SAVE' button is located at the bottom right.


Subscription	Available	Quantity	Action
No records to display.			



+ CREATE
EDIT
CHANGE PASSWORD
INACTIVE
DELETE

Users

Avatar	Name	Email	Status



Environments

Subscription

Security

Users

Roles

Printers

Documents

Payments

Shipments

Create/Edit User


Name
tullo.leon@mscloudexperts.com
Email
tullo.leon@mscloudexperts.com

Subscription	Available	Quantity	Action
Sales module	284	300	-

Roles
Select role
COPY
APPLY

Select Environment
D365BC - Sandbox
D365BC - Production

UPDATE



Environments

Subscription

Security

Users

Roles

Printers

Documents

Payments

Shipments

Subscription	Available	Quantity	Action
Sales module	284	300	-

Roles
Select role
COPY
APPLY

Select Environment
D365BC - Sandbox

COMPANIES
PERMISSIONS
REMOVE ENVIRONMENT

Madisco

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

RF&G Life Insurance

Once the users have been created, they will receive a temporary password to enter the mobile application. Once inside the application, the password can be changed for the convenience of the user who is using it.

Your account has been set up and activated to use Plur-e Mobile. For your convenience, we have included the link to download the APP from the Google store or you can scan the QR Code straight to your phone.

Google Play Store Link: [Google Play Store Link](#)



QR Code:

Email: diego.rozo@mscloudexperts.com

Temporary Password: k8pjX

Now you can start using the application!

Appendices

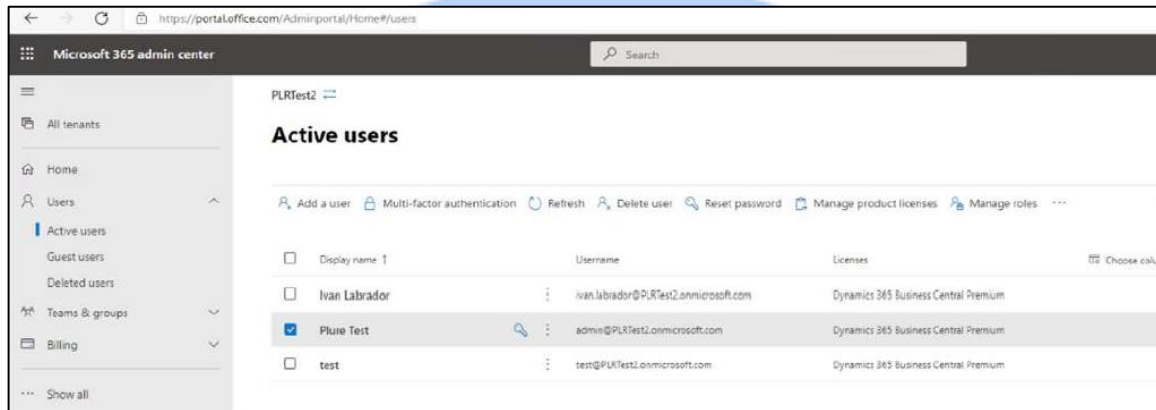
Appendix A

In this appendix you will find the way to configure a central business user with global administrator permissions.

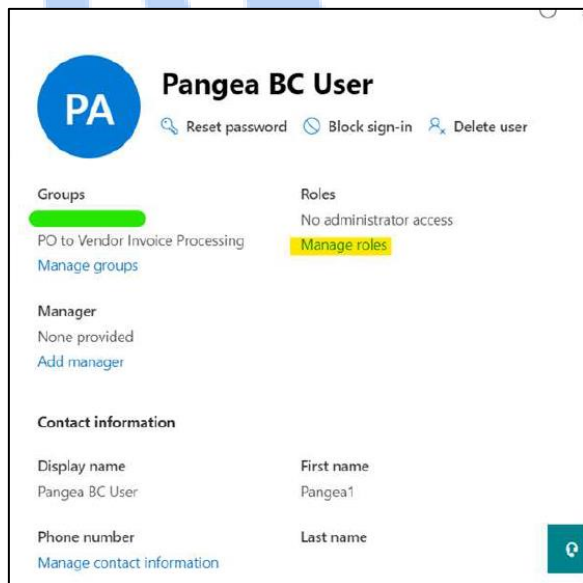
For this we must go to the following link:

<https://portal.office.com/Adminportal/Home#/users>

Once here you select the user to which you want to give global permissions



Select the Manage Roles option.



And we check the option Admin Center Access and then Global Administrator.

Manage admin roles

Admin roles give users permission to view data and complete tasks in admin centers. Give users only the access they need by assigning the least-permissive role.

[Learn more about admin roles](#)

☐ User (no admin center access)

☒ Admin center access

Global readers have read-only access to admin centers, while Global admins have unlimited access to edit all settings. Users assigned other roles are more limited in what they can see and do.

☒ Global Administrator ⓘ





☐ Exchange Administrator ⓘ

☐ Global reader ⓘ

☐ Helpdesk admin ⓘ

It is also recommended to configure the user who is going to install the extension as Super in Business Central.

User Card

Diego Rozo

Effective Permissions

Send Email

Sent Emails

More options

Full Name

Diego Rozo

Authentication Email

diego.rozo@mscloudexperts.com

Status

Active

Mapped To Exchange Id...

☐

Contact Email

diego.rozo@mscloudexperts.com

Authentication Status

Active

Telemetry ID

{a36c439a-0a09-4025-bb35-9...}

Microsoft 365 User Acco...

Active

User Permission Sets

New Line

Delete Line

Permissions

Permission Set ↑	Description	Company ↑	Extension Name	Permission Scope
AUTOMATE - ...	Automate - Exec	CRONUS USA, Inc.	System Application	System
D365 BUS FU...	Dyn. 365 Full Business...	CRONUS USA, Inc.	Base Application	System
EXCEL EXPOR...	D365 Excel Export Act...	CRONUS USA, Inc.	System Application	System
LOCAL	Country/region-specif...	CRONUS USA, Inc.	Base Application	System
LOGIN	Login access	CRONUS USA, Inc.	System Application	System
→ SUPER	This role has all perm...			System