Supplier Tender Management accelerator for

Dynamics 365 for Business Central

USER GUIDE

supplier tender
management
accelerator

Confidentiality and Legal Notice

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Table of contents

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1. INTRODUCTION

This *abridged* User Guide describes the functionality of the Supplier Tender Management accelerator. For more help once the accelerator is purchased, please contact Prodware.

1.1   Solution description

The Supplier Tender Management accelerator allows you to create generic tenders, linked to sales quotes, sales orders or jobs. Create multiple purchase quotes under the same tender to find preferential rates from your suppliers.

1.2   Objective of solution

This accelerator helps to simplify and align your vendor sales tender processes in Dynamics 365. The administrative burden of preparing and issuing tender responses can be heavy; document management has been improved, management can see the tender statuses in real-time and ensure terms and conditions are aligned, and the quote to cash process is streamlined overall.
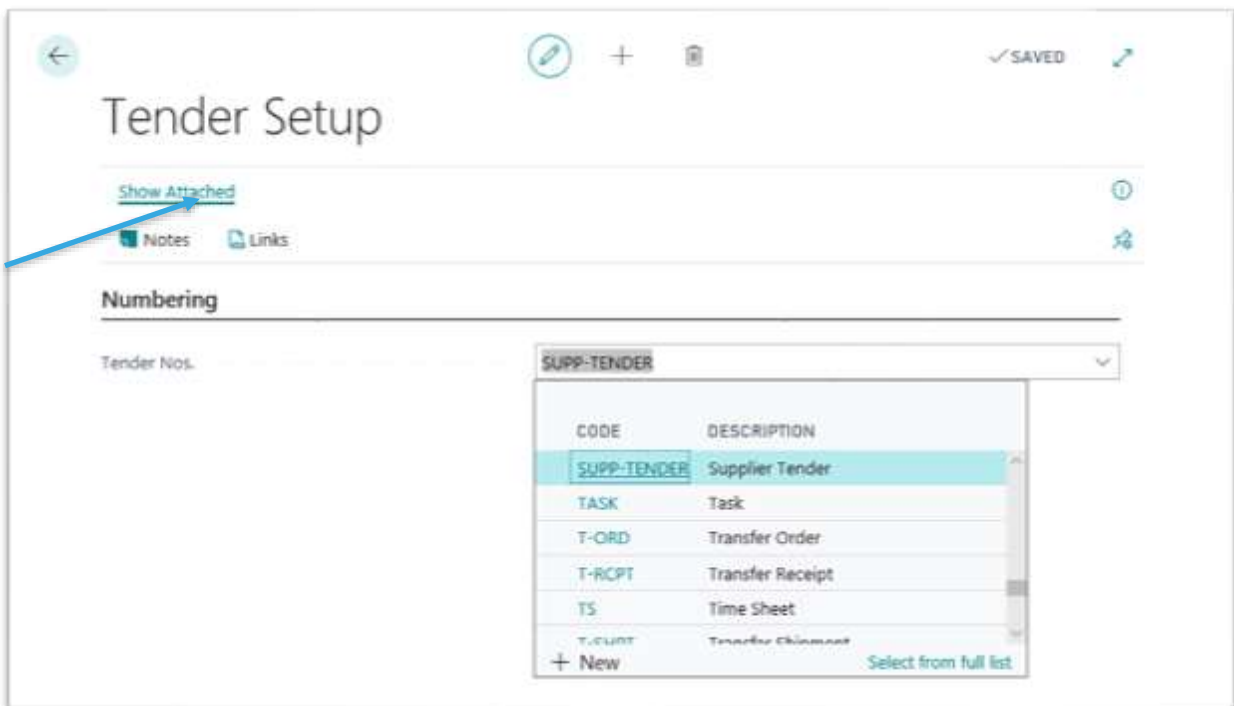
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2. SUPPLIER TENDER MANAGEMENT FUNCTIONALITY

2.1 Settings

Search for **page** "Tender Setup":

Select the series number that will be used to create tender headers. The number can be entered automatically or manually according to the setting of the series number

2.2   Create a supplier tender

Search for **page "Tenders":**

TELL ME WHAT YOU WANT TO DO

Tenders

Go to Pages and Tasks   Show less (3)
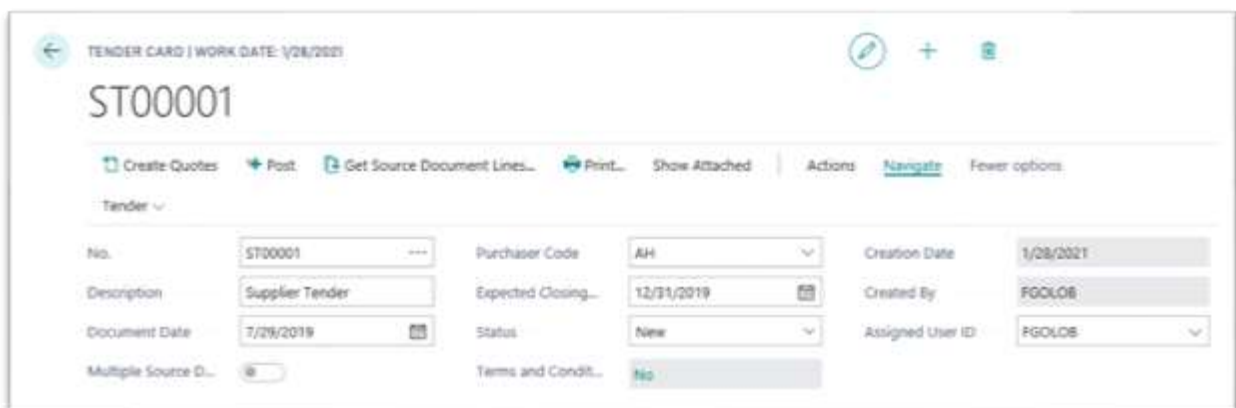
> Tenders   Lists

Click on New to create a new tender:

← TENDERS | WORK DATE: 1/28/2021

🔍 Search ＋ New   Manage   🖶 Print…   Show Attached   📊 Open in Excel | More options

2.2.1   General tab

← TENDER CARD | WORK DATE: 1/28/2021   ⊘ ＋ 🗑

ST00001

📋 Create Quotes   ＋ Post   📄 Get Source Document Lines…   🖶 Print…   Show Attached | Actions   Navigate   Fewer options

Tender ∨

No.	ST00001 …	Purchaser Code	AH ∨	Creation Date	1/28/2021
Description	Supplier Tender	Expected Closing…	12/31/2019 📅	Created By	FGOLOB
Document Date	7/29/2019 📅	Status	New ∨	Assigned User ID	FGOLOB ∨
Multiple Source D…	●	Terms and Condit…	No		

> Number comes from a new series number of tender settings

> Enter a description

> Document date is automatically fed by the working date but remains modifiable if
  necessary

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> Multiple source document: this field is activated automatically as soon as you enter a different source number or several source types several times. See flows later in the document

> Enter a purchaser code from the available list, not mandatory

> Select an expected closing date for the tender; non-mandatory, non-blocking, informative field

> The status offers you five options: New, In progress, Issued, Waiting, Closed. This field is modified manually and will allow you to follow the progress of your tender

> Creation date: additional fields, powered by the system with the working date, it will be unmodifiable

> Created by: additional fields, powered by the system with user ID who creates the document, it will be unmodifiable

> Assigned user ID: additional fields, powered by the system with user ID who creates the document, but it will remain editable

> Terms and **Conditions: Yes / No. If it is** "Yes", click on it and the terms and conditions page linked to the document header will open. See paragraph "Terms and Conditions" below.

2.2.2 Supplier Tender line tab

In this tab, enter the items that will be part of the tender and for what you want to create multiple

2.2.3 Create quote function
To generate quotes, click on the "Create quote" button available on the page.

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2.2.4 Supplier Tender sub-line tab

The "Tender sub-line" tab fills with the different selected vendors. You cannot change the purchase price directly from the tender sub-page, the unit cost comes from the purchase request. For each item line, there are X lines of suppliers, which can be different for each item.

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2.3   Quote choice

Update the "Status" field of each line of the quote. Put the value "Lost" for the quote lines not retained and the value "Won" for the quote lines retained.

The "won" lines will be in bold green.
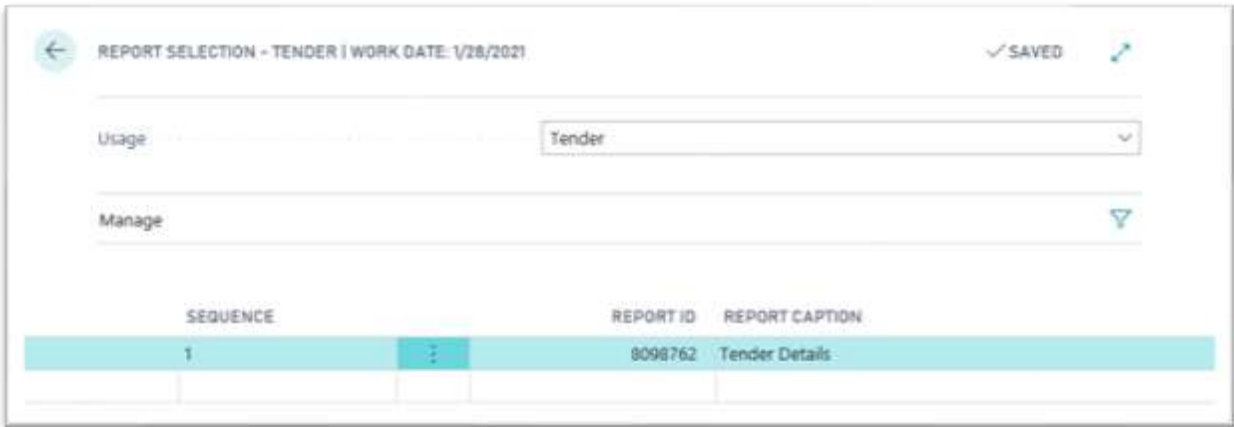
The "lost" lines will be in bold red.

The user must validate their choice.

2.4   Reports

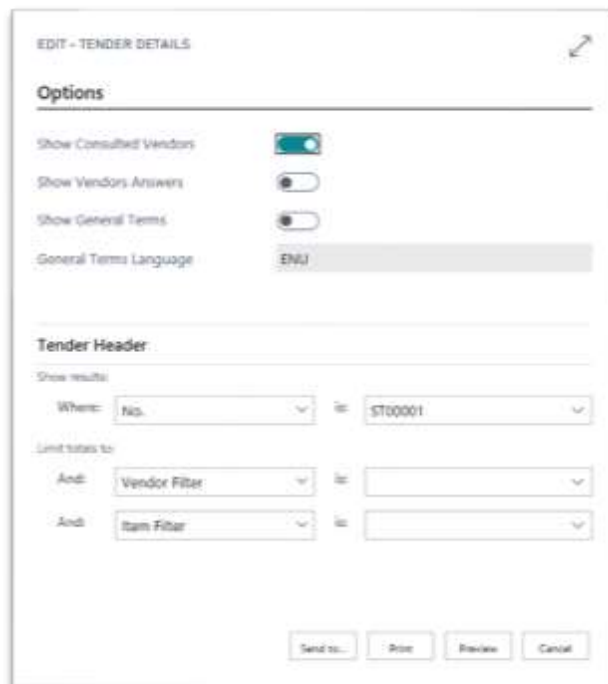Search for the **"Report Selection – Tender"** page:

Set a new line with report ID 8098762.

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2.4.1 Print a supplier tender

To print general information of the tender and item content with related conditions.

When you want to print the report, different options are available:

Microsoft Dynamics 365 Business Central allows you to print tenders in two different formats: RDLC and WORD.

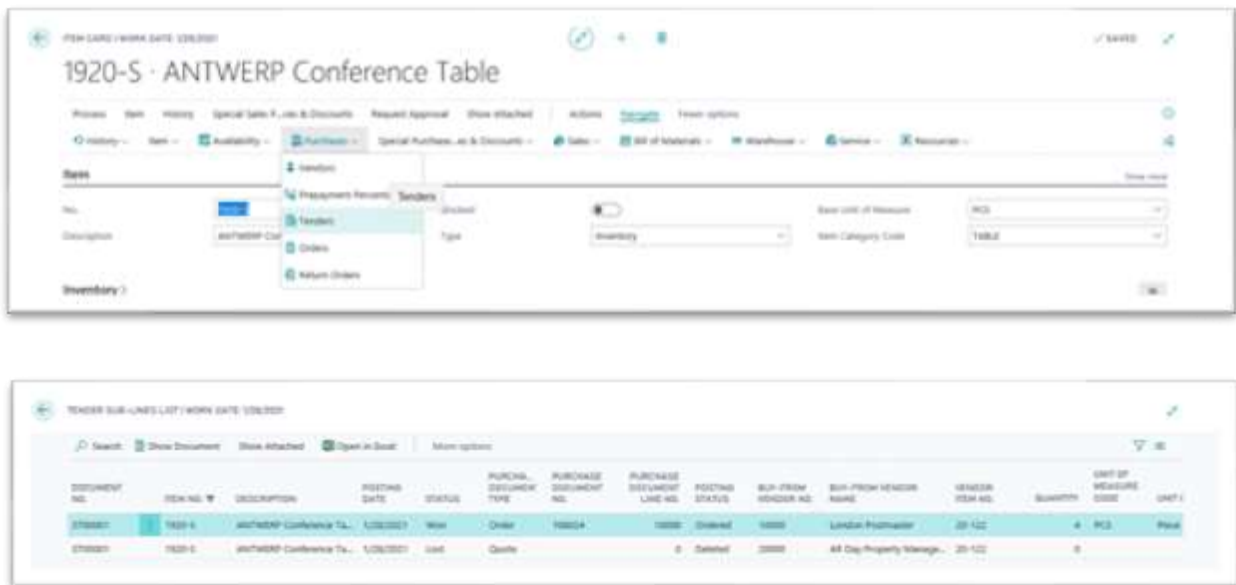### 2.4.2 Print purchase quotes related to supplier tenders

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Printing of the purchase quote linked to a tender makes it possible to visualize the information of the following tender:

> Terms and conditions
> Conditions related to items.

2.5   History

2.5.1   Item

In the item card has been added a button "tender" to list all tender lines with this item:

Click on "Show Document" to display the tender where the item is included.

2.5.2   Vendor

A "Tender" button has also been added to the vendor card to see the tender lines linked to the selected vendor:

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Click on "Show Document" to display the tenders where the vendor is included.

A new "Tender" process flow field has been added to the "Vendor History" FactBox to see how many tenders are linked to the vendor.

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