



Supplier Tender Management  
accelerator for

Dynamics 365 for Business Central

# USER GUIDE



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This document is valid for the Supplier Tender Management accelerator for Dynamics 365 for Business Central.

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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

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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

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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.

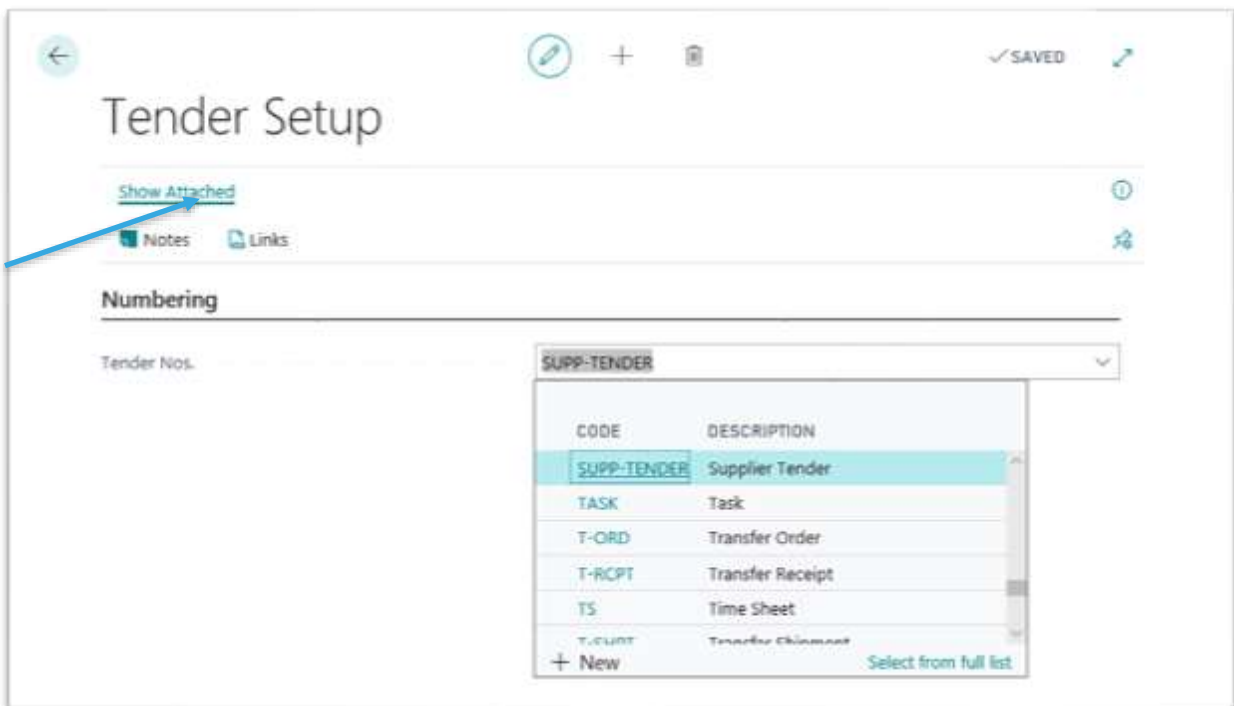
## 2. SUPPLIER TENDER MANAGEMENT FUNCTIONALITY

### 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

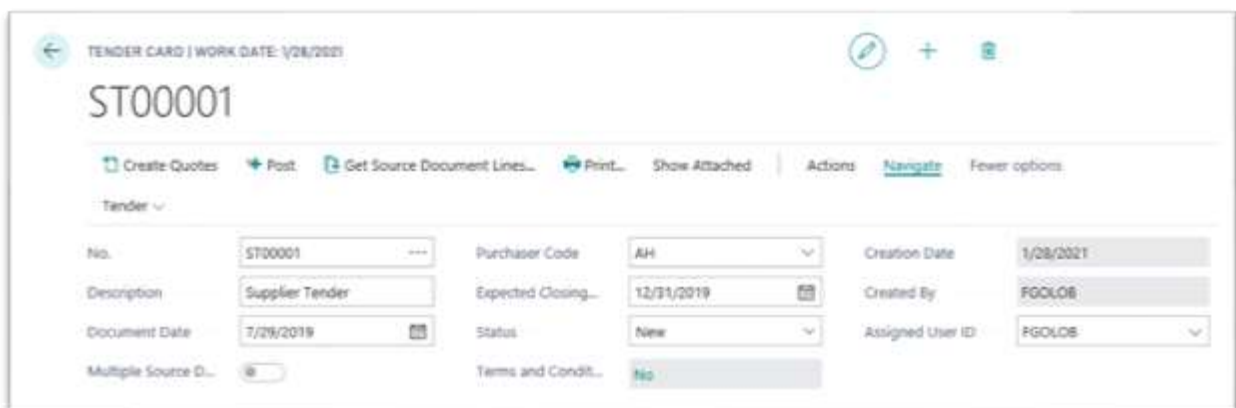
Click on New to create a new tender:



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...	<input type="checkbox"/>	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

- > 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.

TENDER CARD WORK DATE: 1/26/2021

ST00001

Create Quotes | Print | Get Source Document Lines... | Print... | Show Attached | Actions | [Sublines](#) | Tender options

Tender

**General**

No.: ST00001 | Purchase Code: Bin | Creation Date: 1/26/2021  
 Description: Supplier Tender | Expected Closing Date: 02/01/2021 | Created By: FRODUM  
 Document Date: 1/26/2021 | Status: New | Assigned User ID: FRODUM  
 Multiple Source Documents: [X] | Terms and Conditions: No

**Lines** | [Manage](#) | Line | Tender options

New Line | Delete Line

ITEM NO	DESCRIPTION	Quantity	UNIT OF MEASURE CODE	UNIT OF MEASURE	LAST DIRECT COST	UNIT COST	INDIRECT COST %	VENDOR NO	VENDOR ITEM NO	SOURCE TYPE	SOURCE NO	JOB TASK NO	TERMS AND COND
1020-S	ANTWERP Conference Table	4	PCS	Piece	328.00	328.00	0	20000	20-122	Sales Order	101005		No
13-120	Loudspeaker, Black, 120W	10	PCS	Piece	45.00	45.00	0			Sales Order	104008		No

### 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.

**Lines** | [Manage](#) | Line | Tender options

New Line | Delete Line

ITEM NO	DESCRIPTION	Quantity	UNIT OF MEASURE CODE	UNIT OF MEASURE	LAST DIRECT COST	UNIT COST	INDIRECT COST %	VENDOR NO	VENDOR ITEM NO	SOURCE TYPE	SOURCE NO	JOB TASK NO	TERMS AND COND
1020-S	ANTWERP Conference Table	4	PCS	Piece	328.00	328.00	0	20000	20-122	Sales Order	101005		No
13-120	Loudspeaker, Black, 120W	10	PCS	Piece	45.00	45.00	0			Sales Order	104008		No

**Tender Lines** | [Manage](#) | Line | Tender options

New Line | Delete Line

ITEM NO	DESCRIPTION	POSTING DATE	STATUS	PURCH. DOCUMENT TYPE	PURCHASE DOCUMENT NO	PURCHASE DOCUMENT LINE NO	POSTING STATUS	BUY-FROM VENDOR NO	BUY-FROM VENDOR NAME	BUY-FROM VENDOR NAME 2	VENDOR ITEM NO	Quantity
1020-S	ANTWERP Conference Table	1/26/2021	In Progress	Quote	1003	10000		10000	London Postmaster		20-122	4.00
1020-S	ANTWERP Conference Table	1/26/2021	In Progress	Quote	1004	10000		20000	AR Day Property Manage...		20-122	4.00

**Lines** | [Manage](#) | Line | Tender options

New Line | Delete Line

ITEM NO	DESCRIPTION	Quantity	UNIT OF MEASURE CODE	UNIT OF MEASURE	LAST DIRECT COST	UNIT COST	INDIRECT COST %	VENDOR NO	VENDOR ITEM NO	SOURCE TYPE	SOURCE NO	JOB TASK NO	TERMS AND COND
1020-S	ANTWERP Conference Table	4	PCS	Piece	328.00	328.00	0	20000	20-122	Sales Order	101005		No
13-120	Loudspeaker, Black, 120W	10	PCS	Piece	45.00	45.00	0			Sales Order	104008		No

**Tender Lines** | [Manage](#) | Line | Tender options

New Line | Delete Line

ITEM NO	DESCRIPTION	POSTING DATE	STATUS	PURCH. DOCUMENT TYPE	PURCHASE DOCUMENT NO	PURCHASE DOCUMENT LINE NO	POSTING STATUS	BUY-FROM VENDOR NO	BUY-FROM VENDOR NAME	BUY-FROM VENDOR NAME 2	VENDOR ITEM NO	Quantity
1020-S	Loudspeaker, Black, 120W	1/26/2021	In Progress	Quote	1003	10000		10000	London Postmaster			10.00
13-120	Loudspeaker, Black, 120W	1/26/2021	In Progress	Quote	1004	10000		20000	AR Day Property Manage...			10.00



## 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.

ITEM NO.	DESCRIPTION	POSTING DATE	STATUS	PURCHASE DOCUMENT TYPE	PURCHASE DOCUMENT NO.	PURCHASE DOCUMENT LINE NO.	POSTING STATUS	BUY FROM VENDOR NO.	BUY FROM VENDOR NAME	BUY FROM VENDOR NAME 2	VENDOR TDM NO.	QUANTITY
<b>1000</b>	<b>ANCWERP Conference Table 1/09/2021</b>		<b>Won</b>	Quote	1000	10000		10000	<b>London Postmaster</b>		<b>28-122</b>	4.00
<b>1000</b>	<b>ANCWERP Conference Table 1/09/2021</b>		<b>Lost</b>	Quote		0 Deleted		<b>20000</b>	<b>All Day Property Manag...</b>		<b>28-122</b>	4.00

The "won" lines will be in bold green.

The "lost" lines will be in bold red.

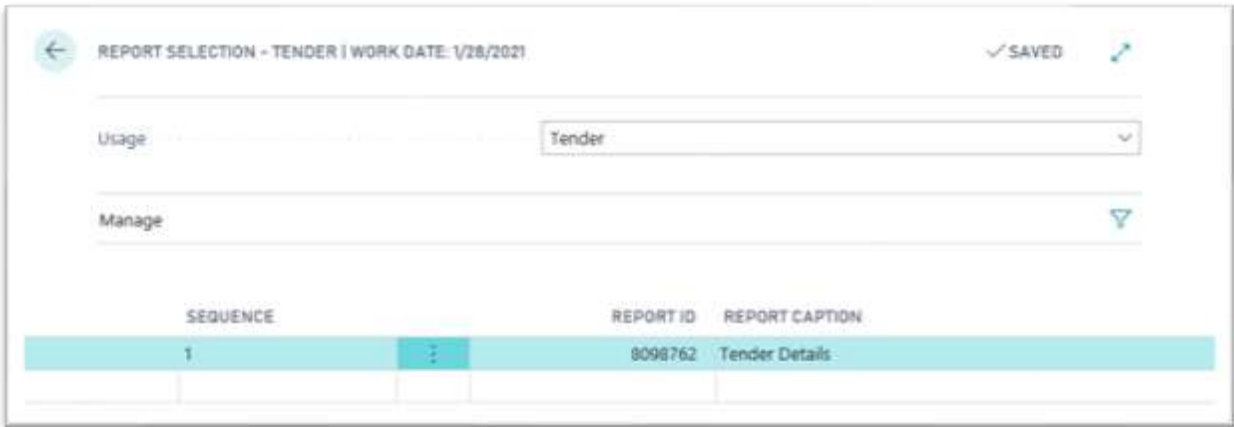
The user must validate their choice.

## 2.4 Reports

Search for the "Report Selection – Tender" page:



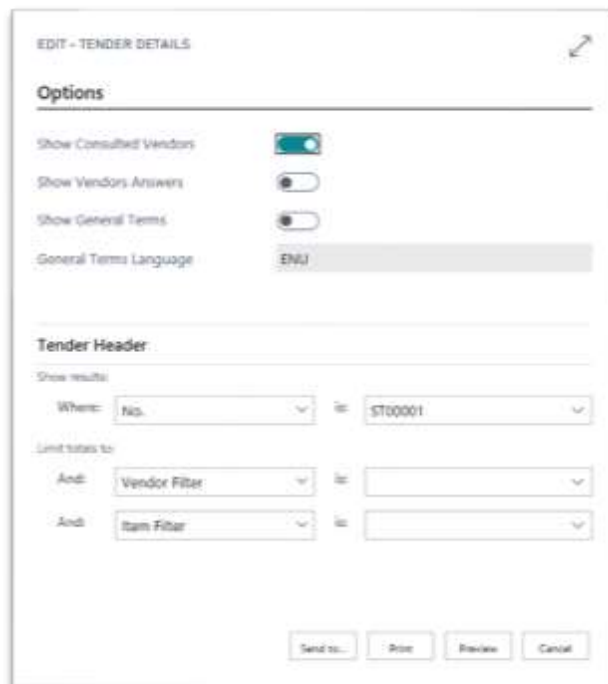
Set a new line with report ID 8098762.



### 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](#)

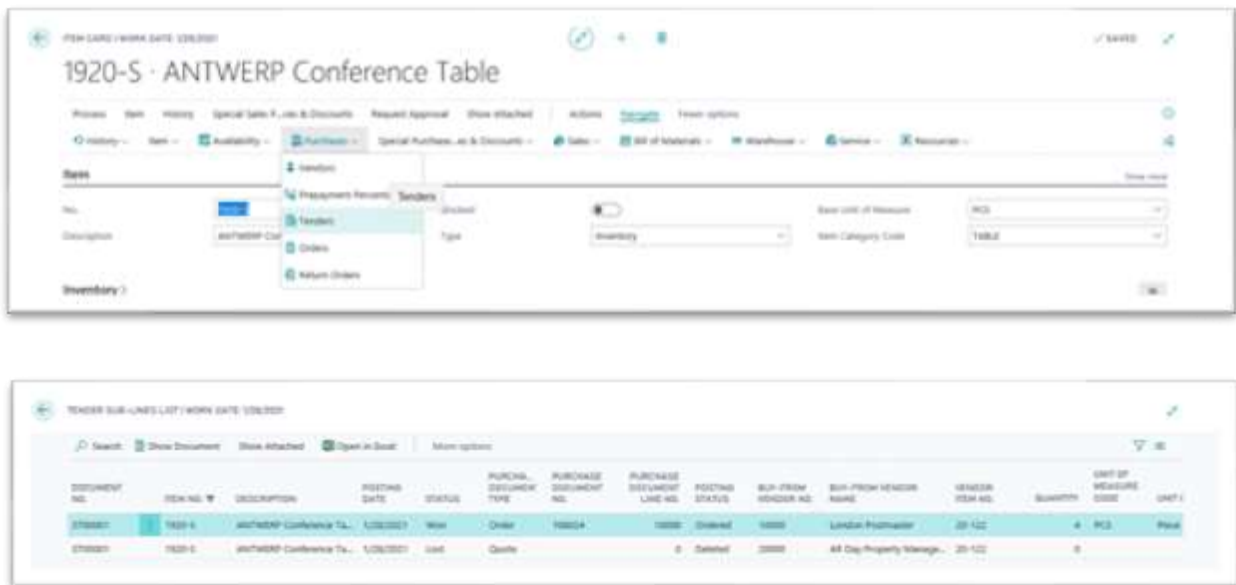
Printing of the purchase quote linked to a tender makes it possible to visualize the information of the following tender:

- > 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:



TENDER SUB-LINES LIST (WORK DATE: 1/23/2021)

DOCUMENT NO.	ITEM NO.	DESCRIPTION	POSTING DATE	STATUS	PURCHASE DOCUMENT TYPE	PURCHASE DOCUMENT NO.	PURCHASE DOCUMENT LINE NO.	POSTING STATUS	BUY FROM VENDOR NO.	BUY FROM VENDOR NAME	VENDOR ITEM NO.	QUANTITY	UNIT OF MEASURE CODE	UNIT L
170001	1000-E	40074000 Conference Tr...	1/23/2021	Open	Order	10004	1000	Ordered	1000	London Postmaster	10-102	1	PCS	Price
170001	10-102	Londonair, Black, COFF	1/23/2021	Open	Order	10004	2000	Ordered	1000	London Postmaster		10	PCS	Price

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.

