

End User Guide (Multiple Purchase Quote)

Createch 365

Microsoft Partner
Gold Gestion intégrée

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Revision history

Version	Date	Revision Description	Prepared by
1.0	2016-12-16	First Version	The Createch group

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Objective User guide

The objective of this user guide is to present the step to use and set up multiple purchases quote.

With this extension, you will be able to create a master document that contains all the necessary information about sending a quote to multiple vendors.

With a single click, Purchase Quotes will be created automatically from the Master Purchase Quote.

1. Installation of the extension

Before using the app in Dynamics 365, please make sure if the extension is installed. You can follow these steps:

- Click on the search function from your home page



- The search page opens:
 - 1- Enter extension in the search bar
 - 2- Select the related item

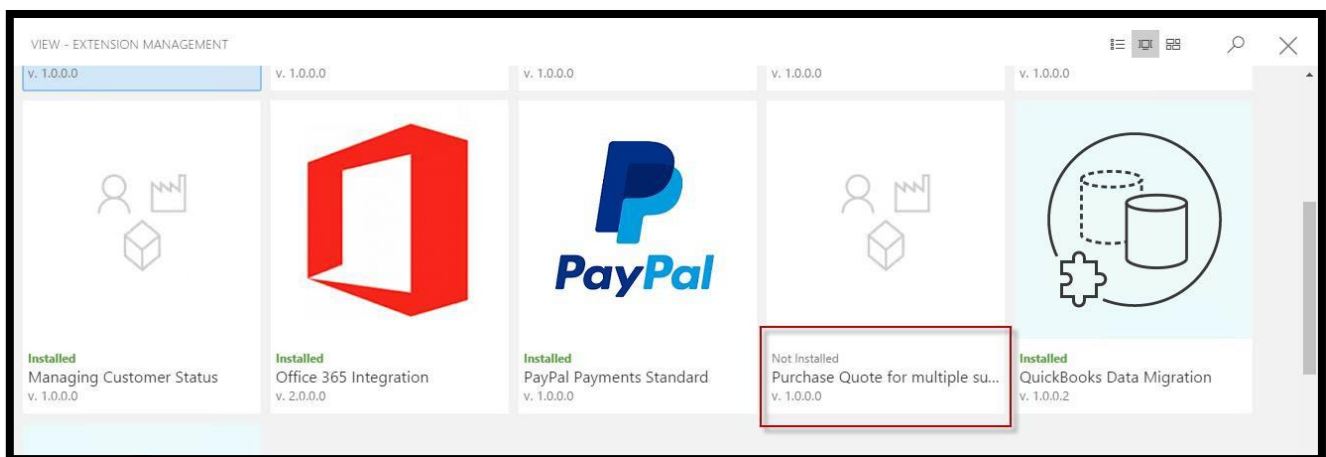


The extension management page opens:

If the status of the related extension is installed, the extension is correctly installed.

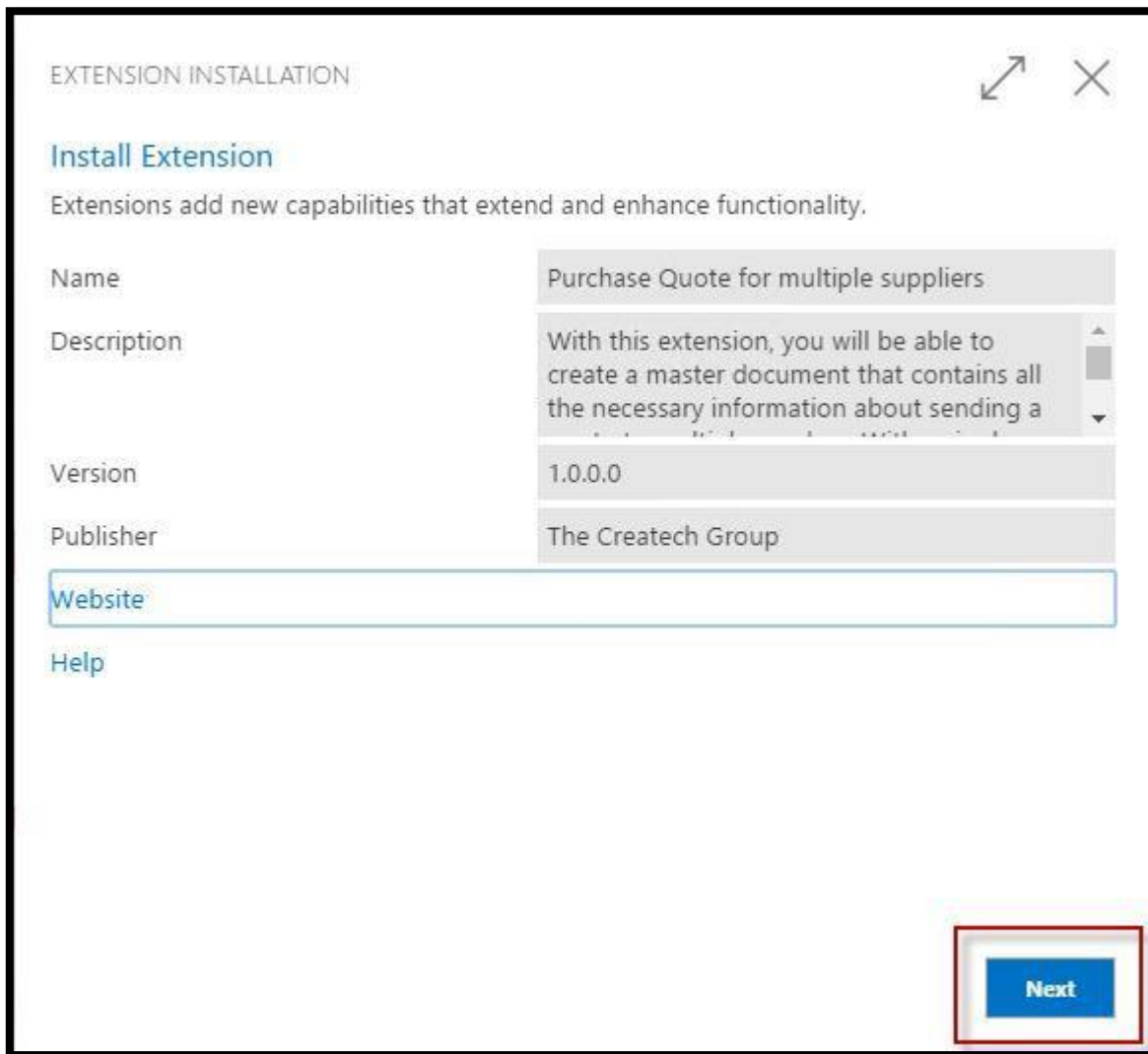
If it is Not Installed, you can:

- Click in the extension called "Purchase Quote for multiple suppliers"



The Extension Installation Wizard opens:



- Click on Next



The next step of the wizard opens:

- Accept the terms and conditions
- Click on Install

EXTENSION INSTALLATION



Review Extension Information before installation

Name	Purchase Quote for multiple suppliers
Publisher	The Createch Group

[Terms and Conditions](#)
[Privacy Statement](#)


I accept the terms and conditions

☒

Back

Install

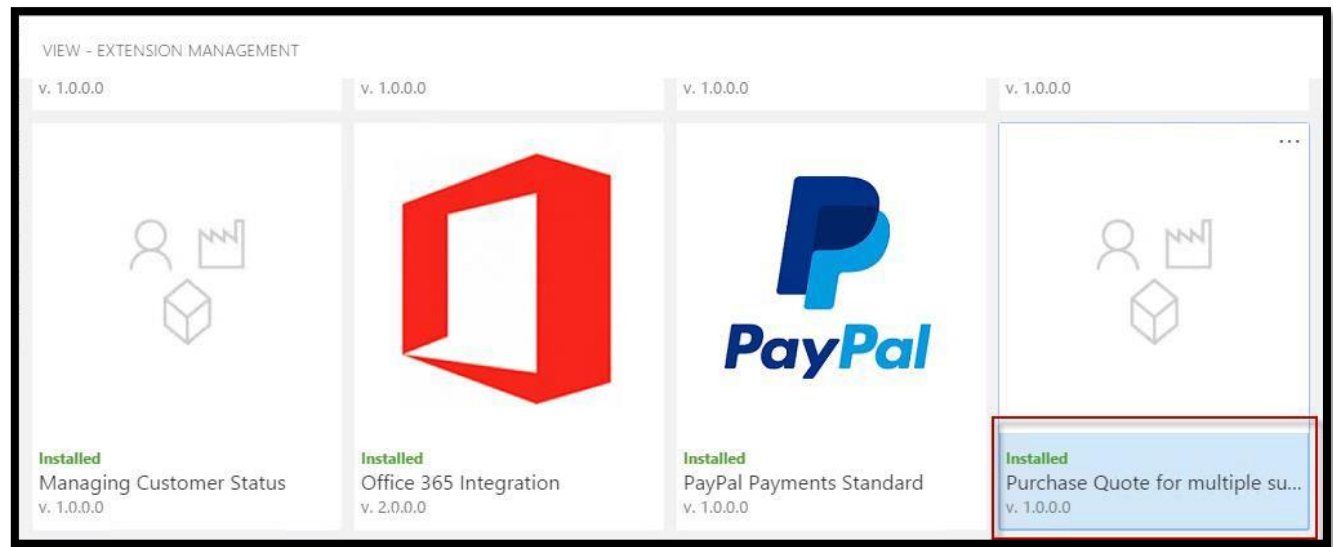
Click on Ok.



The Purchase Quote for multiple suppliers extension was successfully installed. All active users must log out and log in again to see the navigation changes.

OK

The extension is correctly installed.



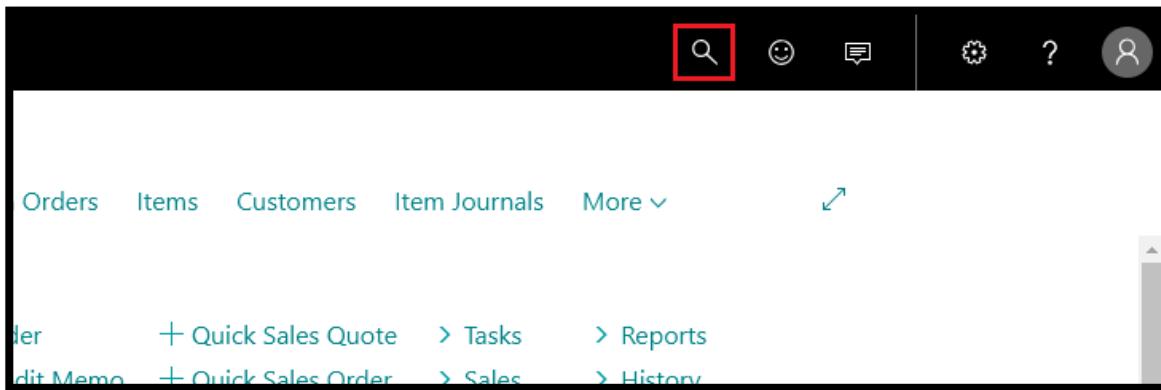
2. Create a master purchase quote

This section describes the steps to create a master purchase quote

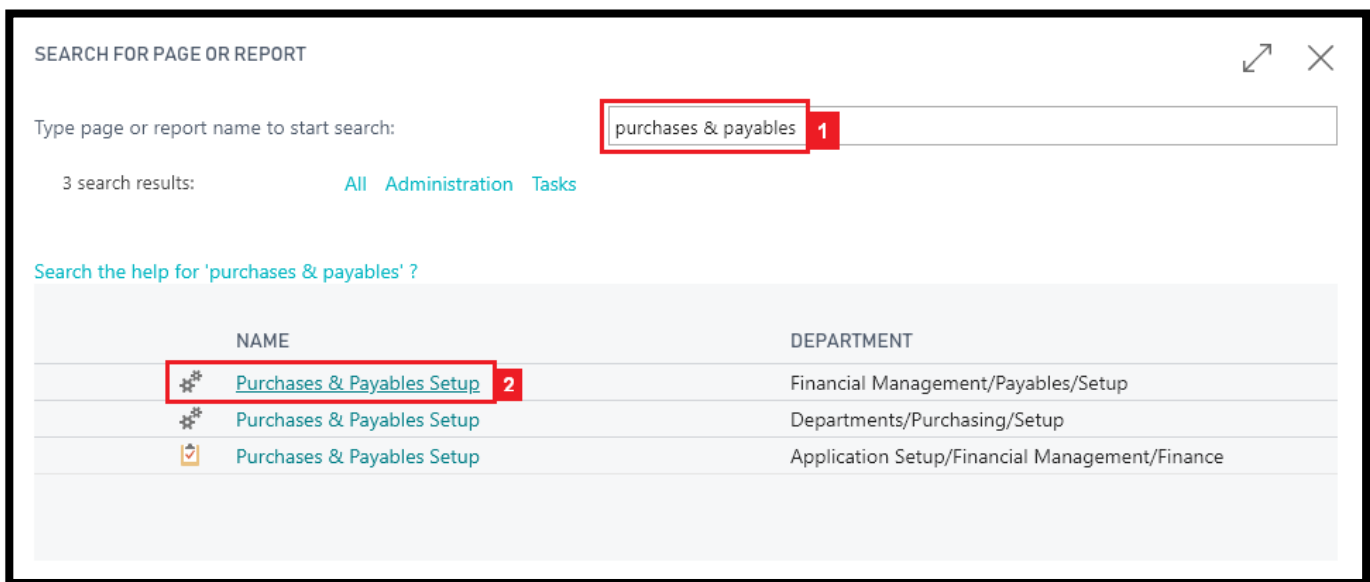
2.1. Purchases & Payables Setup

First, you must go in Purchases & Payables Setup, Follow these steps:

- Click on the search function from your home page



- The search page opens:
 - 1- Enter Purchases & Payables in the search bar
 - 2- Select Purchases & Payables Setup



The Purchases & Payables list opens, go to the Number Series and enter a number under Master Purch. Quote Nos:

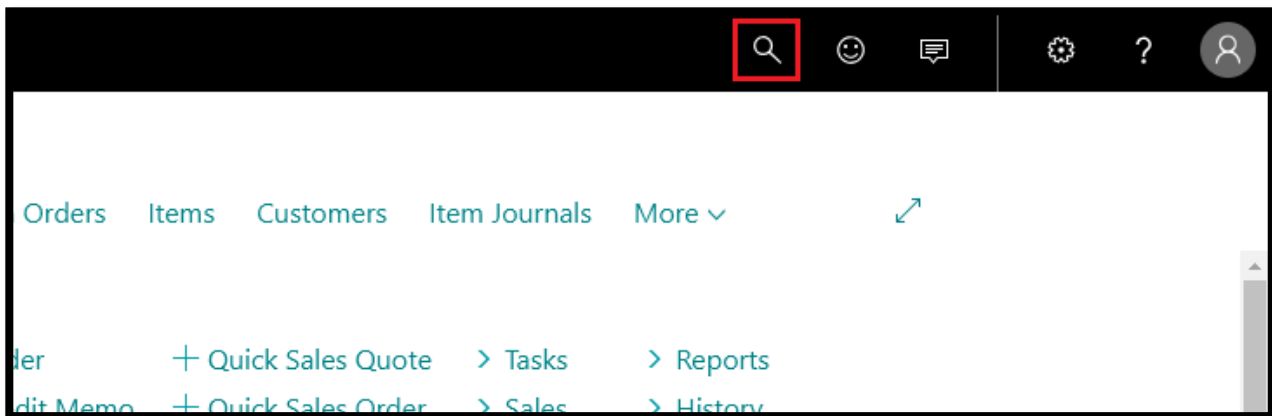
The screenshot shows the 'Purchases & Payables Setup' window. The 'Number Series' section is highlighted with a red box. It contains the following fields:

Number Series	
Vendor Nos.	VEND
Invoice Nos.	P-INV
Posted Invoice Nos.	P-INV+
Credit Memo Nos.	P-CR
Posted Credit Memo Nos.	P-CR+
Master Purch. Quote Nos.	P-QUO

2.2. Create multiple purchase quotes by a master purchase quote

To create multiple purchase quotes, the first step is to create a master purchase quote. This master purchase quote will generate a purchase quote for all the vendors included on the master

- Click on the search function from your home page



- The search page opens:
 - 1- Enter Master Purch. Quote
 - 2- Select the first result

SEARCH FOR PAGE OR REPORT

Type page or report name to start search: 1

1 search results: [All](#) [Lists](#)


[Search the help for 'master' ?](#)

NAME	DEPARTMENT
 Master Purch. Quote List 2	Departments/Vendor Quote Management

The Master Purchase Quotes open:

- 1- Click on the + New button to create your Master purchase quote

HOME

VIEW - MASTER PURCH. QUOTE LIST  1

- 2- Select the type (for this example, the type is Item) of the line transaction
- 3- By choosing the type item, the next column open the list of items to select. Select the item (the description will be pulled automatically).
- 4- Enter the quantity of the purchase quote

After, you need to assign the vendors that will be chosen for the purchase quote

- 5- Select the vendors from the list

NEW - MASTER PURCH. QUOTE

Master Purch. Quote

General >

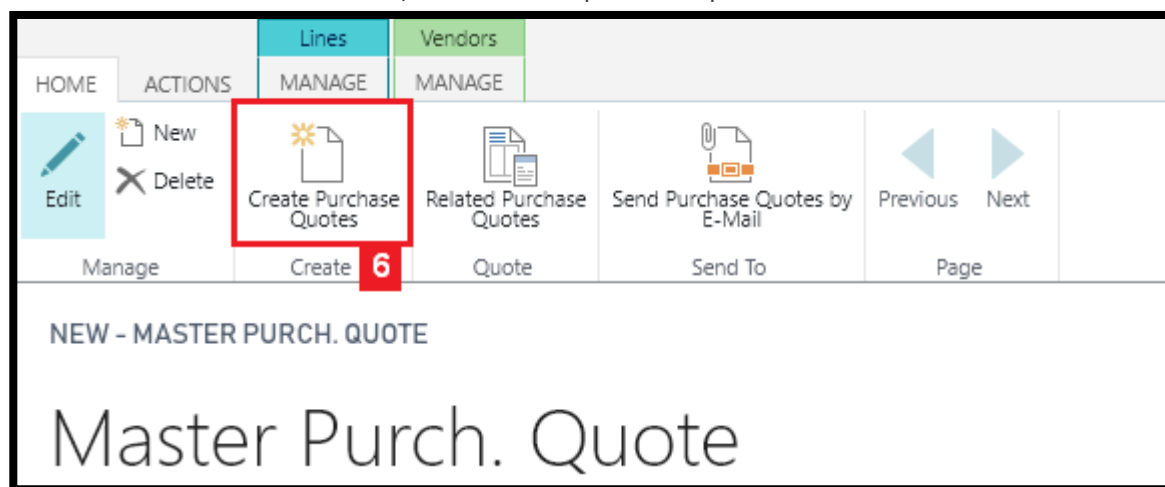
Lines

TYPE	NO.	DESCRIPTION	QUANTITY	UNIT OF MEASURE
Item	1928-S	AMSTERDAM Lamp	10	PCS

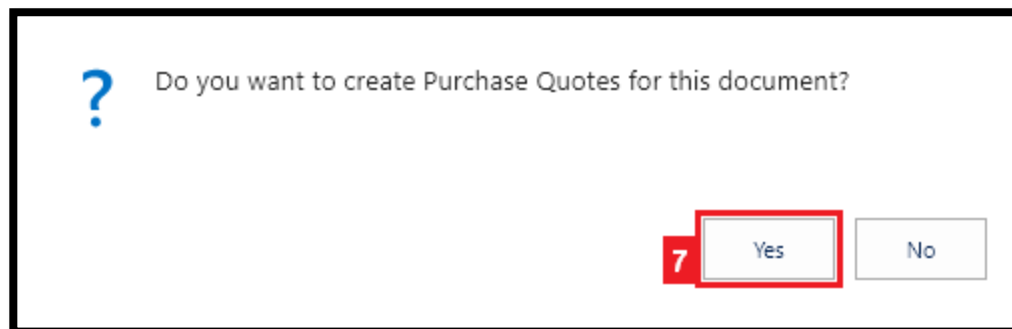
Vendors

BUY-FROM VENDOR NO.	BUY-FROM VENDOR NAME	BUY-FROM CONTACT NO.	BUY-FROM CONTACT	ORDER ADDRESS CODE
50000	Nod Publishers	CT000020		

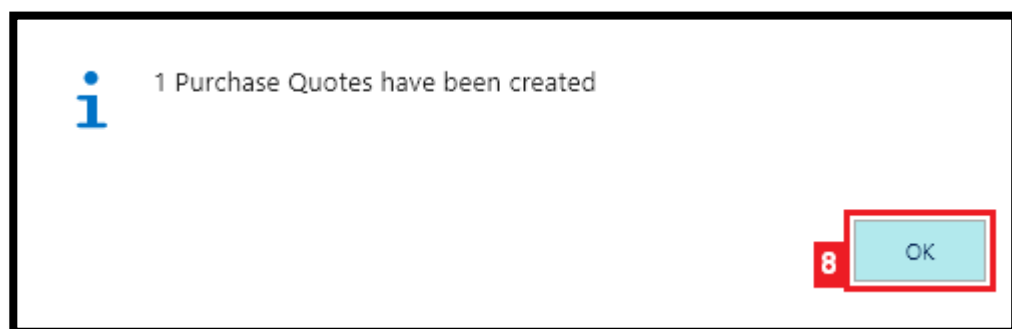
6- From the Create menu, select Create purchase quote



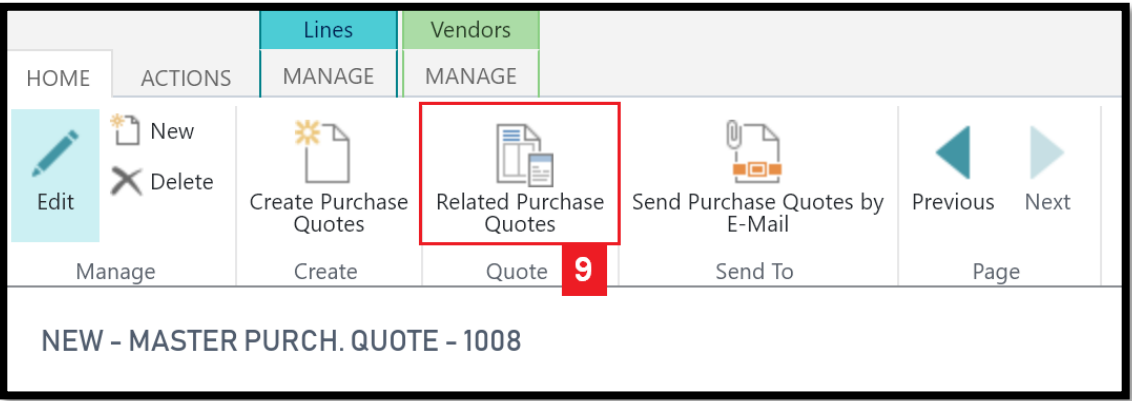
7- Click Yes



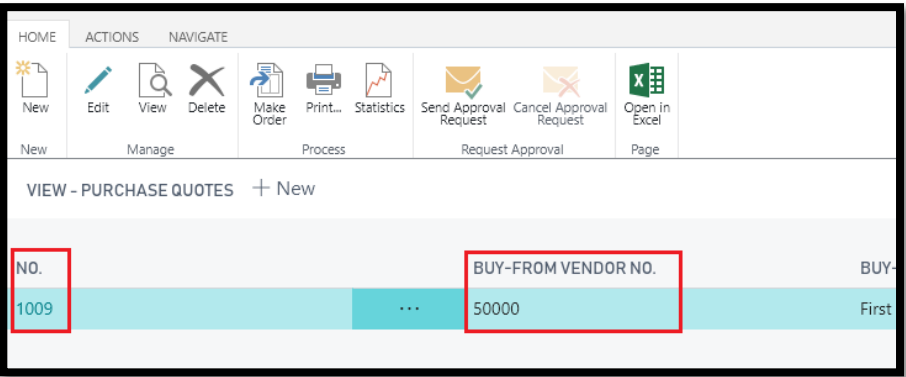
8- Click OK. The system indicates that 1 purchase quote has been created for each supplier on your Master purchase quote



9- Click on the Related Purchase Quotes to see the 2 purchase quotes created by vendors



By clicking on the No. 1009, the system open the purchase quote for the vendor 50000



- 10- Send the purchase quote by email
(you need first to have a valid email address on the vendor card and second)

Configure valid email on the vendor card

HOME ACTIONS NAVIGATE

Manage Process Report Request Approval New Document Page

EDIT - VENDOR CARD

50000 · Nod Publishers

General

Name: Nod Publishers Balance (LCY): 243,107.19

Blocked: Balance Due (LCY): 243,107.19

Address & Contact

ADDRESS

Address: 2000 McGill Coll Av, Suite 450

Address 2:

City: Montreal

State: QC

Post Code: H3A 3H3

Country/Region Code: CA

CONTACT

Primary Contact Code:

Contact: Raymond Hillard

Phone No.:

Email: raymond.hillard@contoso.com

Home Page:

Our Account No.:

Invoicing >

HOME ACTIONS MANAGE MANAGE

Manage Create Quote Send To Page

EDIT - MASTER PURCH. QUOTE - 1008

1008

General

No. 1008

Purchaser Code MD