# End User Guide (Multiple Purchase Quote)

# SERVICES-365

# Microsoft Partner
Gold Gestion intégrée

## Revision history

| Version | Date | Revision Description | Prepared by |
|---------|------|---------------------|-------------|
| **1.0** | 2016-12-16 | First Version | The Createch group |
| **2.0** | 2020-03-02 | Revision | Createch |

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# Table of contents

## Objective User guide

The objective of this user guide is to present the step to use and set up multiple purchases quote.
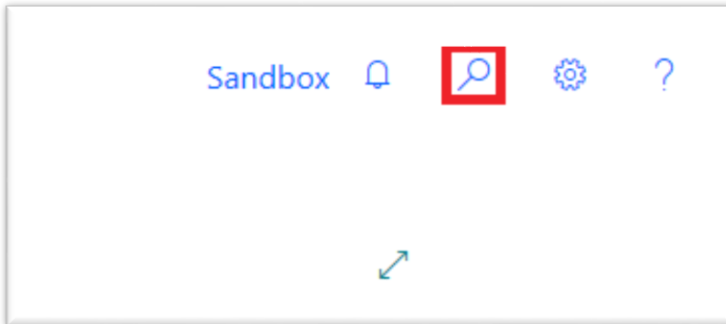
With this extension, you will be able to create a master document that contains all the necessary information about sending a quote to multiple vendors.

With a single click, Purchase Quotes will be created automatically from the Master Purchase Quote.
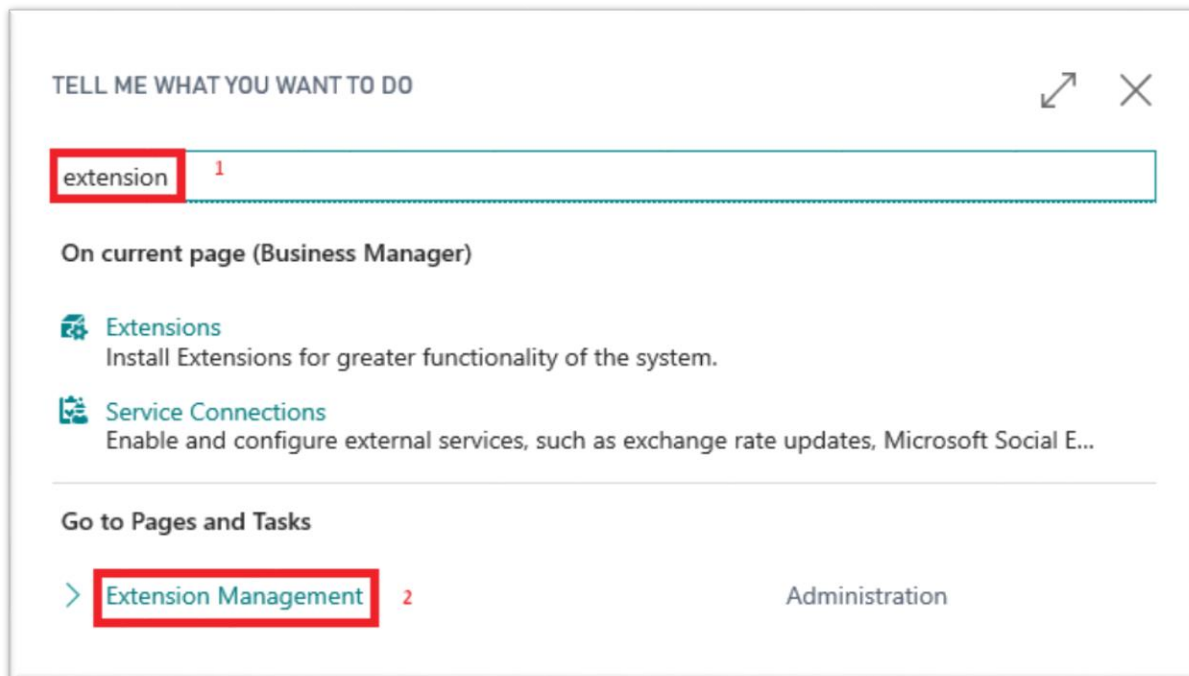
## 1. Installation of the extension

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
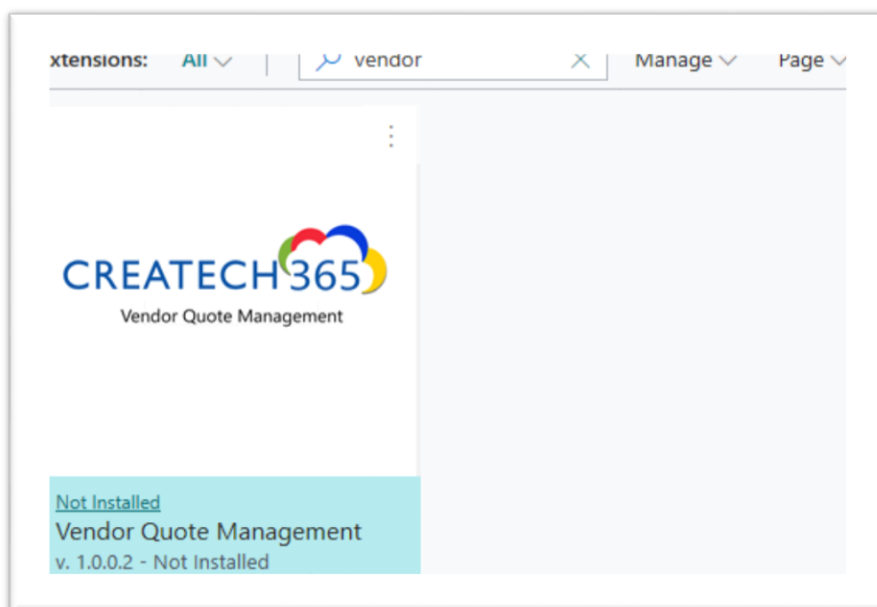2- Select the related item

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 "Vendor Quote Management"

The Extension Installation Wizard opens:

- Click on Next

EXTENSION INSTALLATION

INSTALL EXTENSION
Extensions add new capabilities that extend and enhance functionality.

| Name | Vendor Quote Management |
| --- | --- |
| Description | In the area of purchasing, it is often required to send a quote to multiple vendors to make sure to get the best price for items. But what if you have to send the same quote to a dozen of vendors? What would happen if you |
| Version | 1.0.0.2 |
| Publisher | Createch |
| App ID | 503721ef-7f99-425e-bf81-6a5543fd6804 |

Website

Help

**Next**

The next step of the wizard opens:

- Accept the terms and conditions
- Click on Install

Click on Ok.



The Vendor Quote Management extension was successfully installed. All active users must sign out and sign in again to see the navigation changes.
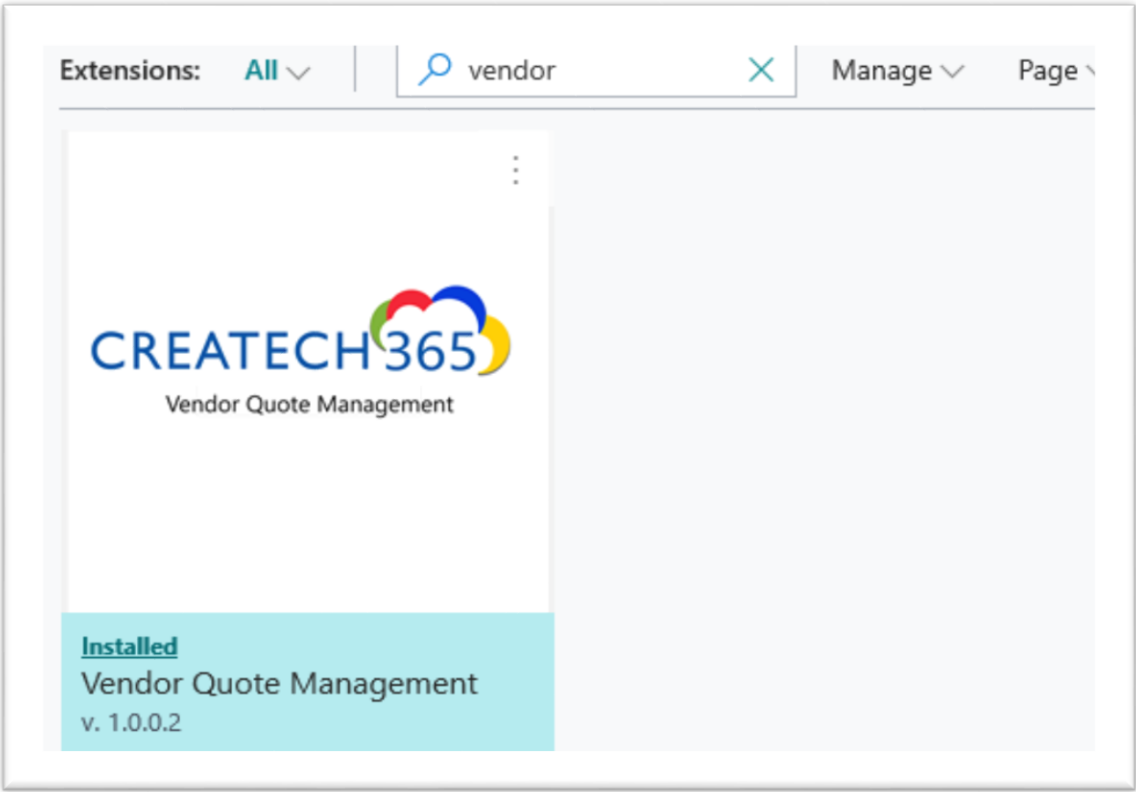
OK

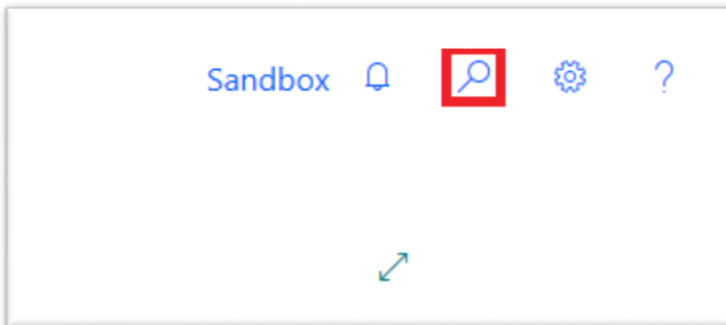The extension is correctly installed.

## 2. Create a master purchase quote

This section describes the steps to create a master purchase quote
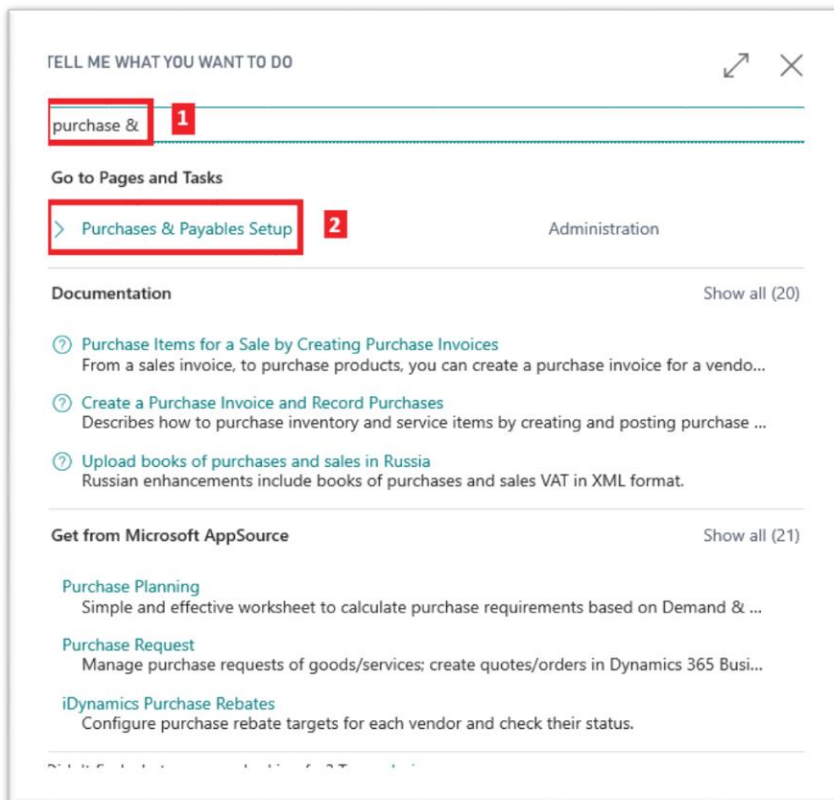
### 2.1.　　Purchases & Payables Setup

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:



## 2.2.     Create multiple purchase quotes by a master purchase quote

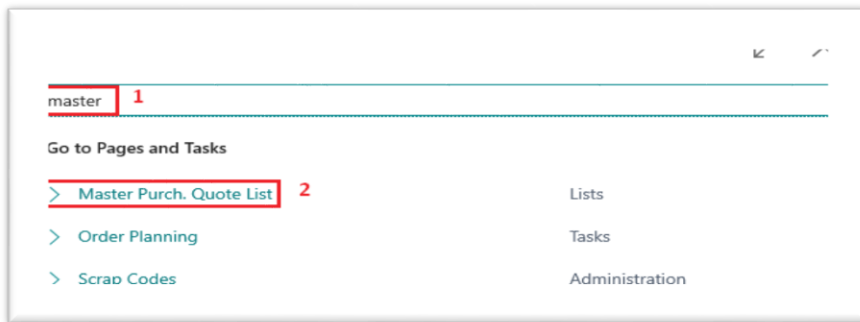To create multiple purchase quotes, the first step is to create a master purchase quote. This master purchase quote will generate a purchase quote for all the vendors included on the master

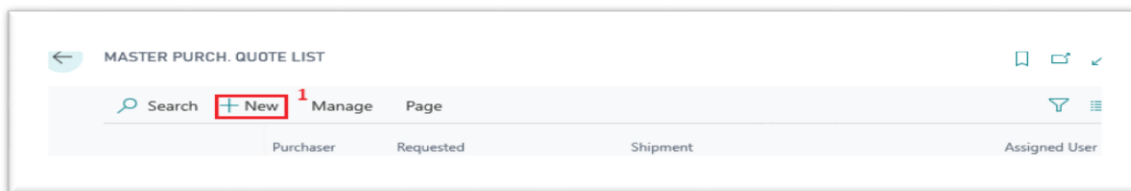- Click on the search function from your home page

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



The Master Purchase Quotes open:

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



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

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MASTER PURCH. QUOTE

# 1003

Create    Quote    Send To    |    Actions    Fewer options

Lines    |    Manage

| | Type | | No. | Description | Quantity | Unit of Measure |
|---|---|---|---|---|---|---|
| → | Item | ⋮ | 1928-S | AMSTERDAM Lamp | 10 | |
| | Item | | 1928-S | AMSTERDAM Lamp | 20 | |
| | | | | | | |

Vendors    |    Manage

| | Buy-from Vendor No. ↑ | | Buy-from Vendor Name | Buy-from Contact No. | Buy-from Contact | Order Address Code |
|---|---|---|---|---|---|---|
| → | 20000 | ⋮ | AR Day Property Management | | | |

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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

MASTER PURCH. QUOTE

# 1003

Create    Quote    Send To    |    Actions    Fewer options

    Related Purchase Quotes    **9**

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

'URCHASE QUOTES

🔍 Search    ＋ New    Manage    Process    Request Approval    Print/Send    Quote    Page

| No. ↑ | | Buy-from Vendor No. | Buy-from Vendor Name |
|---|---|---|---|
| 1004 | ⋮ | 20000 | AR Day Property Management |

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