

End User Guide (Multiple Purchase Quote)

SERVICES-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
2.0	2020-03-02	Revision	Createch

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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.

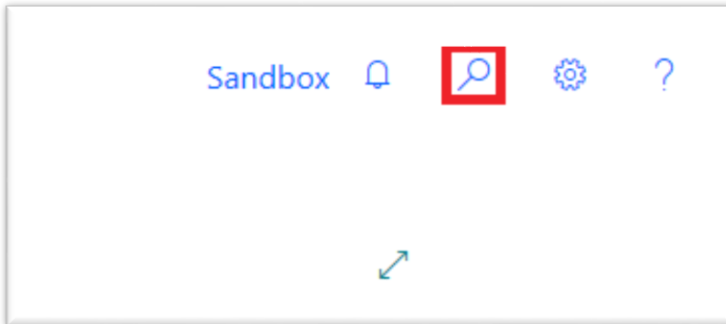
With this extension, you will be able to create a master document that contains all the necessary information about sending a quote to multiple vendors.

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

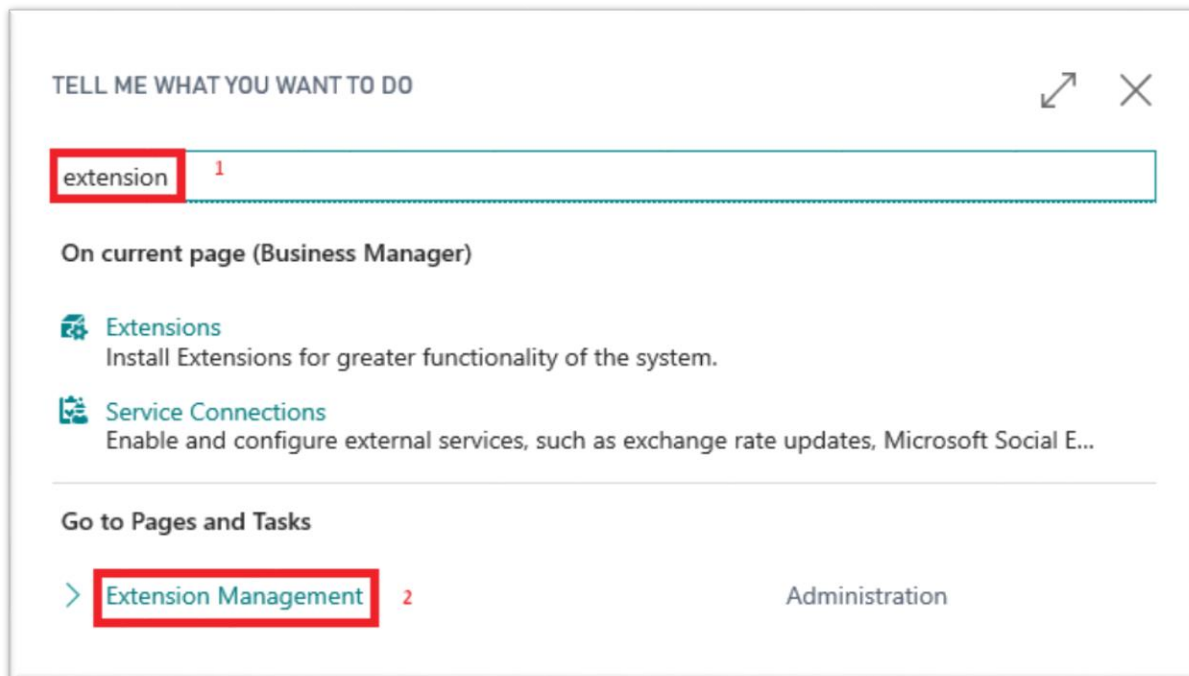
1. Installation of the extension

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

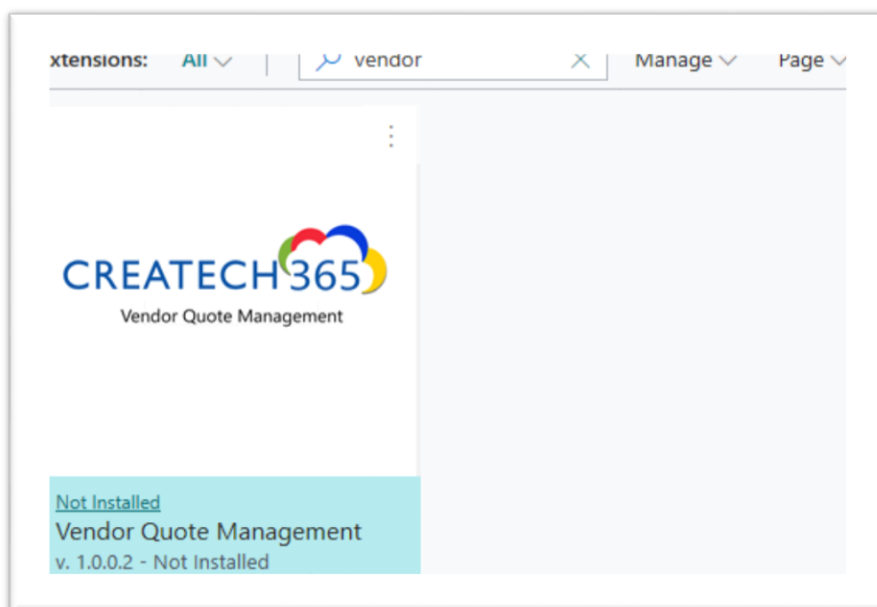


The extension management page opens:

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 "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

EXTENSION INSTALLATION



REVIEW EXTENSION INFORMATION BEFORE INSTALLATION

Name

Vendor Quote Management

Publisher

Createch

Language

English (Canada) ...

[Terms and Conditions](#)

[Privacy Statement](#)

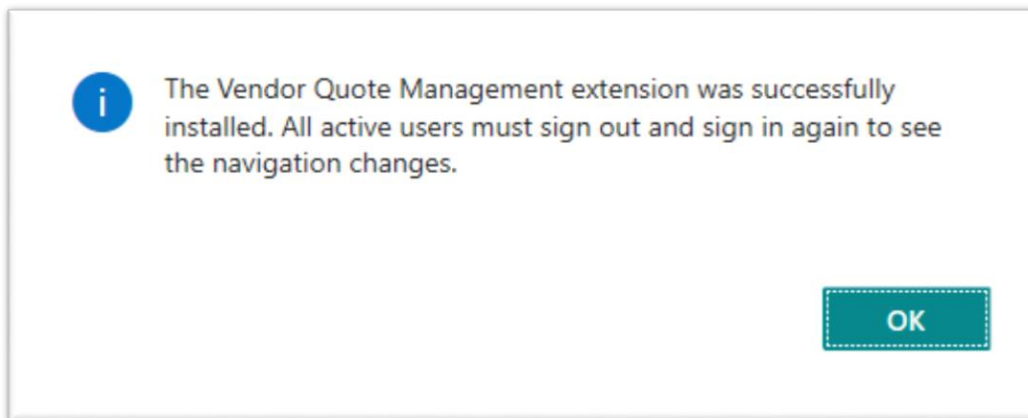
I accept the terms and conditions ..

☒

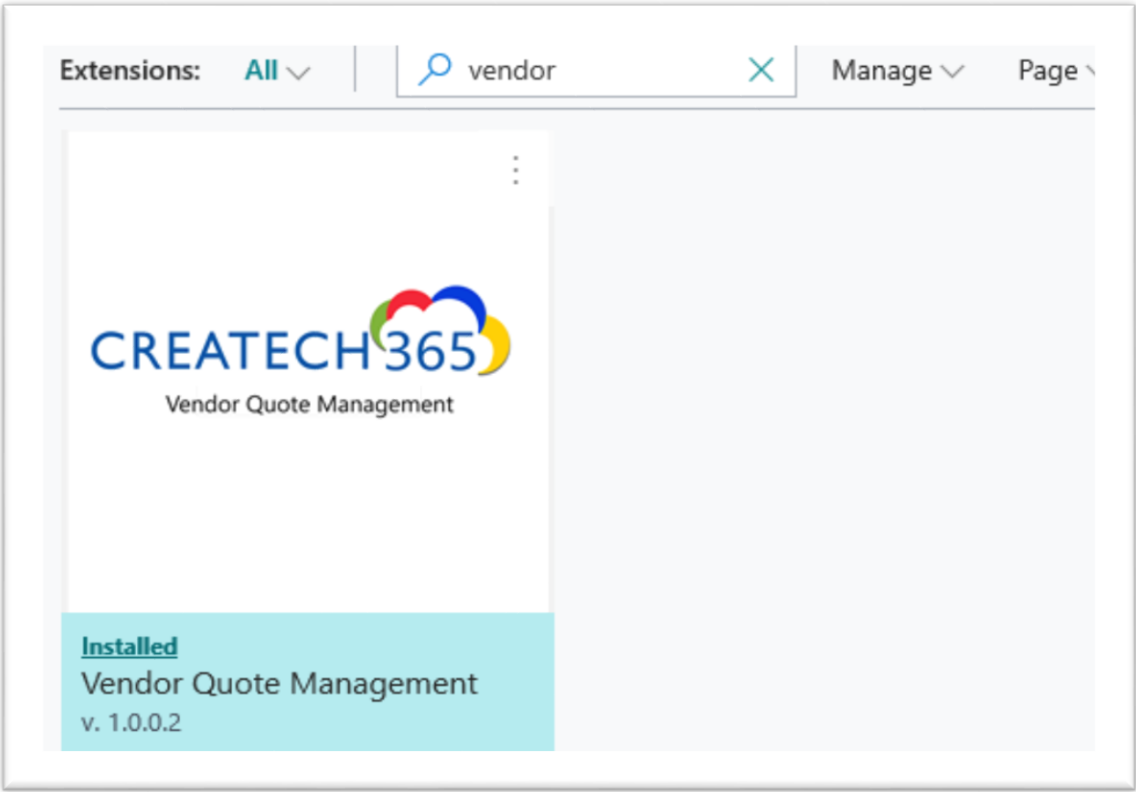
Back

Install

Click on Ok.



The extension is correctly installed.



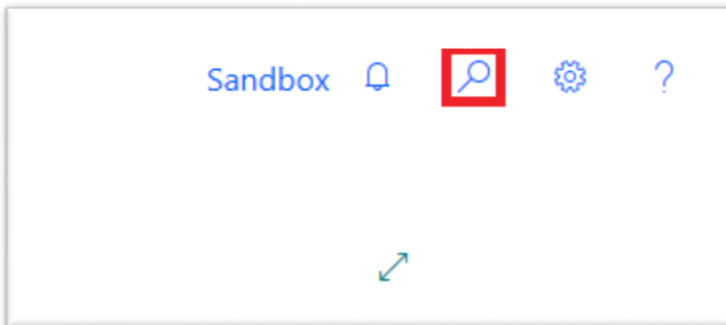
2. Create a master purchase quote

This section describes the steps to create a master purchase quote

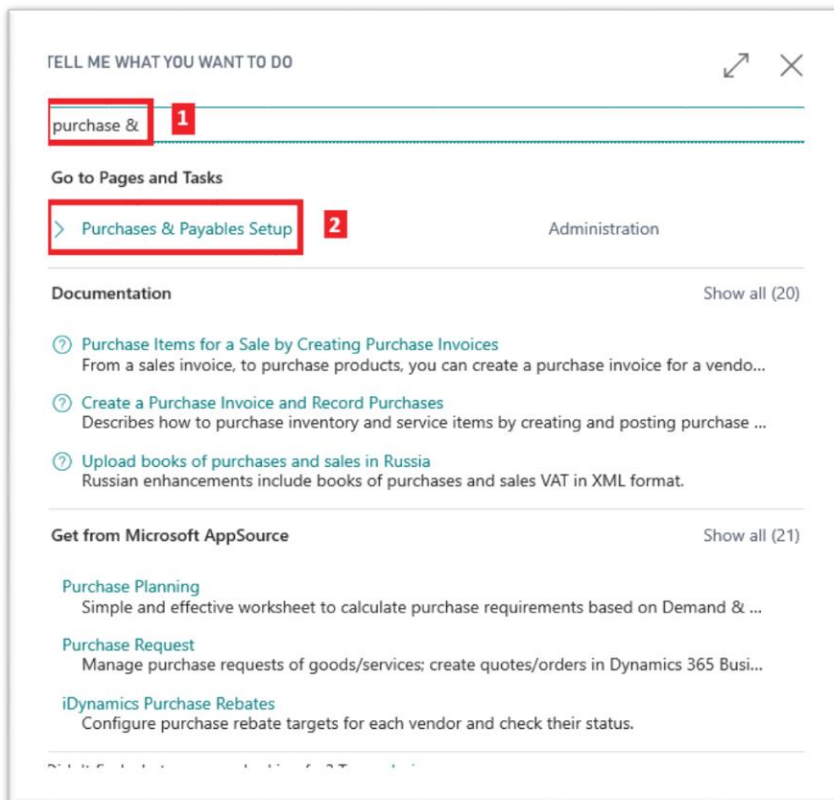
2.1. Purchases & Payables Setup

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:

Purchases & Payables Setup

Vendor Posting Groups Incoming Documents Setup

General Show more

Discount Posting: All Discounts
Invoice Rounding: ☒
Create Item from Ites.: ☐
Copy Vendor Name t.: ☐
Ext. Doc. No. Mandat.: ☒
Allow Tax Difference: ☒
Calc. Inv. Discount: ☐
Calc. Inv. Disc. per VA.: ☐
Appln. between Curr.: All
Exact Cost Reversing: ☐
Prepmnt. Auto Update: Never
Default Posting Date: Work Date
Default Vendor DIOT:
Use Vendor's Tax Are.: ☐
Ignore Updated Addr.: ☐

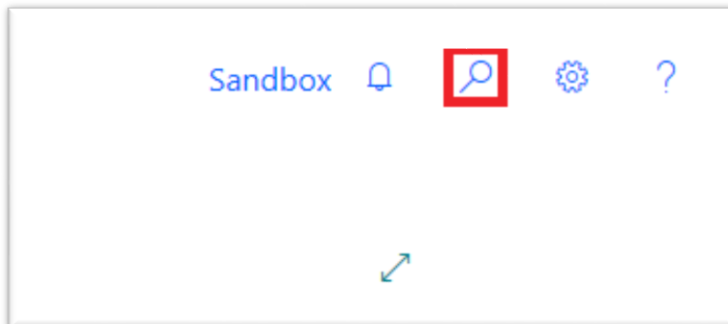
Number Series Show more

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

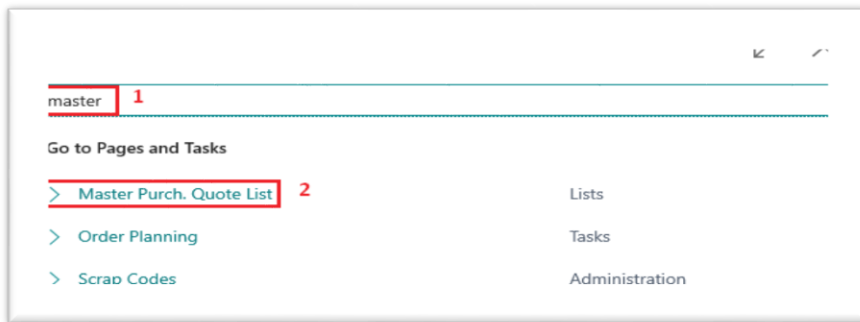
2.2. Create multiple purchase quotes by a master purchase quote

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

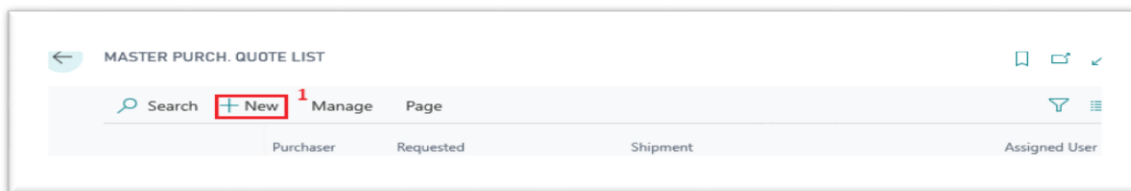


- The search page opens:
- 1- Enter Master Purch. Quote
- 2- Select the first result



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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Create Quote Send To Actions Fewer options

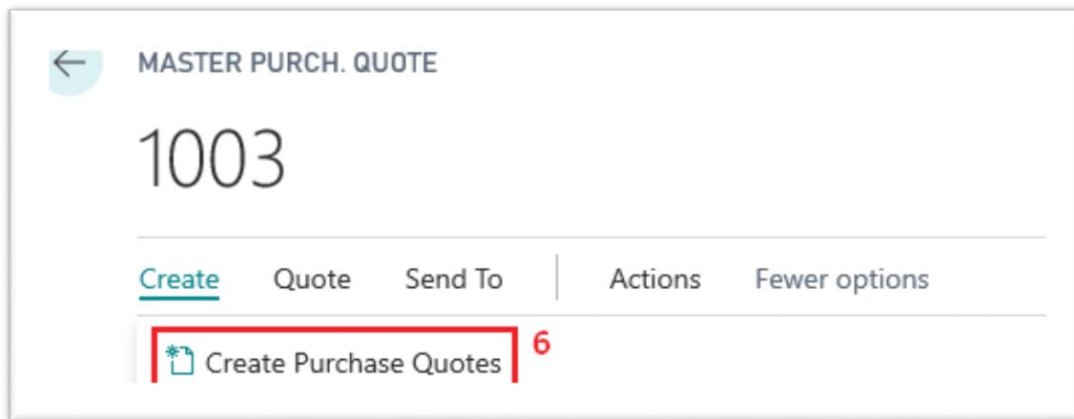
Lines Manage 

2		3		4	
Type	No.	Description	Quantity	Unit of Measure	
→ Item	1928-S	AMSTERDAM Lamp	10		
Item	1928-S	AMSTERDAM Lamp	20		

Vendors Manage 

5		Buy-from Vendor Name	Buy-from Contact No.	Buy-from Contact	Order Address Code
→ Buy-from Vendor No. 1	20000	AR Day Property Management			


6- From the Create menu, select Create purchase quote



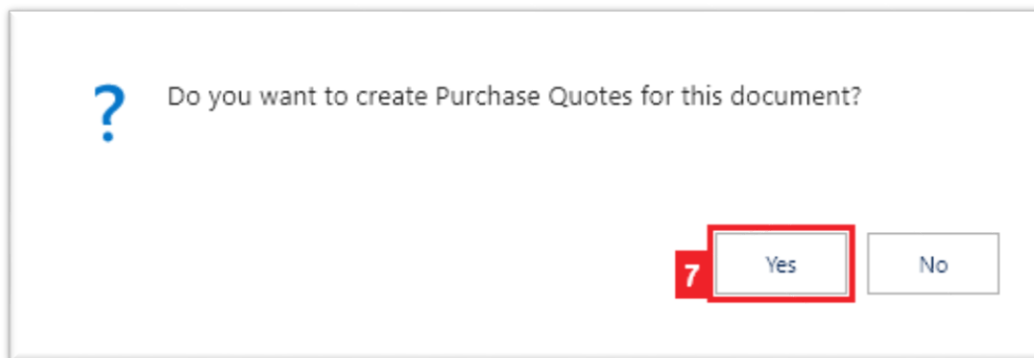
← MASTER PURCH. QUOTE

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Create Quote Send To | Actions Fewer options

 Create Purchase Quotes ⁶

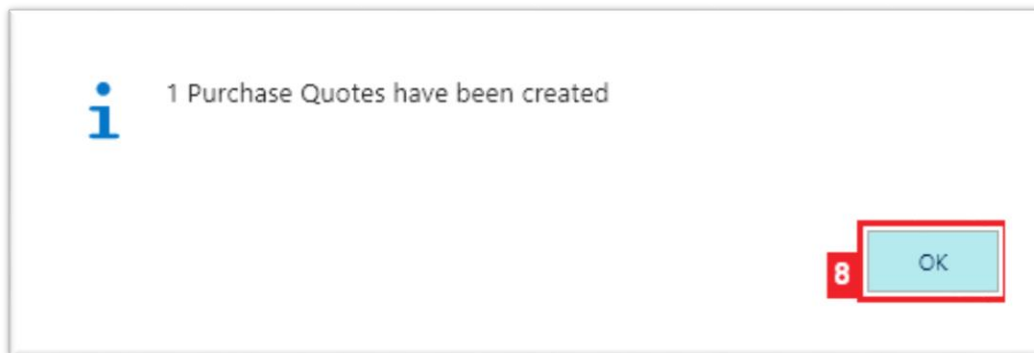
7- Click Yes



? Do you want to create Purchase Quotes for this document?

⁷ Yes No

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



i 1 Purchase Quotes have been created

⁸ OK

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

PURCHASE 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

00000 · AR Day Property Management

Process Report Request Approval New Document Navigate Vendor Actions Navigate Report Fewer options

General Show more

Account No.	20000	Balance (\$)	31,269.82
Company Name	AR Day Property Management	Balance Due (\$)	31,269.82
Account Type		DIOT Type of Operation	

Address & Contact Show more

ADDRESS		CONTACT	
Address	10155 - 102 Street, Suite 2100	Primary Contact Code	
Address 2		Contact	
Country/Region Code	CA	Phone No.	
City	Edmonton	Email	info@arday.com
Postal/ZIP Code	T5J 4G8	Home Page	
View on Map		Our Account No.	

← MASTER PURCH. QUOTE

1003

Create Quote Send To Actions Fewer options

 Send Purchase Quotes by E-Mail 10