



Dynamics 365 - Request for Quotation Creation

Revision 1



Revision History

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			Verified	Alamgir Tamoori
			Approved	
			Prepared	
			Verified	
			Approved	
			Prepared	





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1 About User Manual

This document describes the step-by-step guide for creation of Request for Quotation (RFQ). It is a process in which company acquire the prices for some particular items or products. The company floats the request for quotation to different suppliers and select the supplier based on the best lowest quotation/rates.

In this manual, the procedure of creating Request for Quotation will be briefed out.

2 Dynamics 365 – RFQ Page

To access the RFQ page, click on the modules and select the 'Procurement and sourcing'. Click on the 'All requests for quotations' option available under the Request for Quotations.

Navigation: Modules > Procurement and Sourcing > All requests for quotations

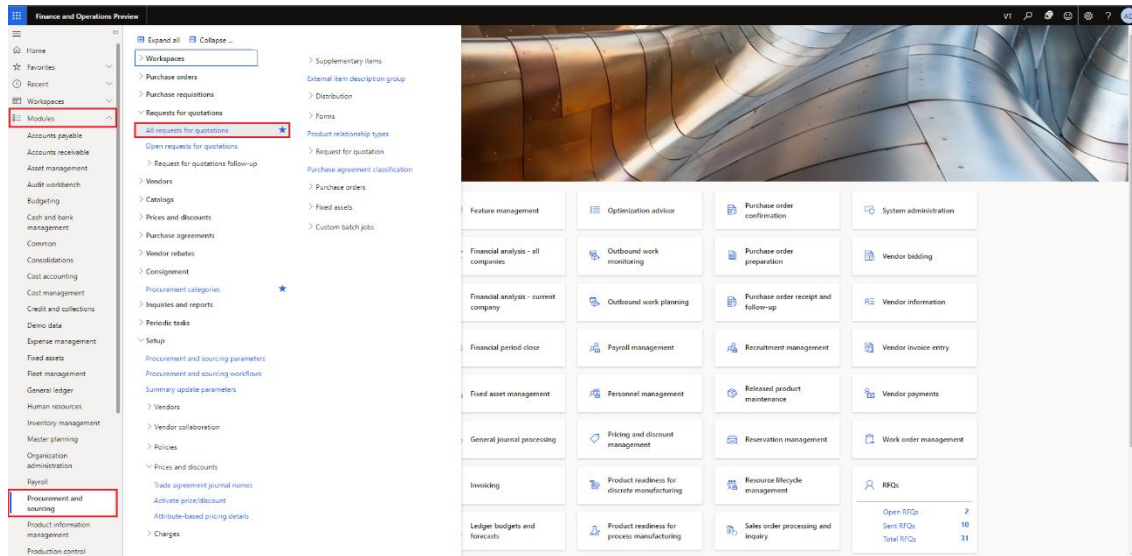


Figure 1. Dynamics 365 – Process to open all requests for quotations page

On pressing the All request for quotations option, all RFQ page will open up.

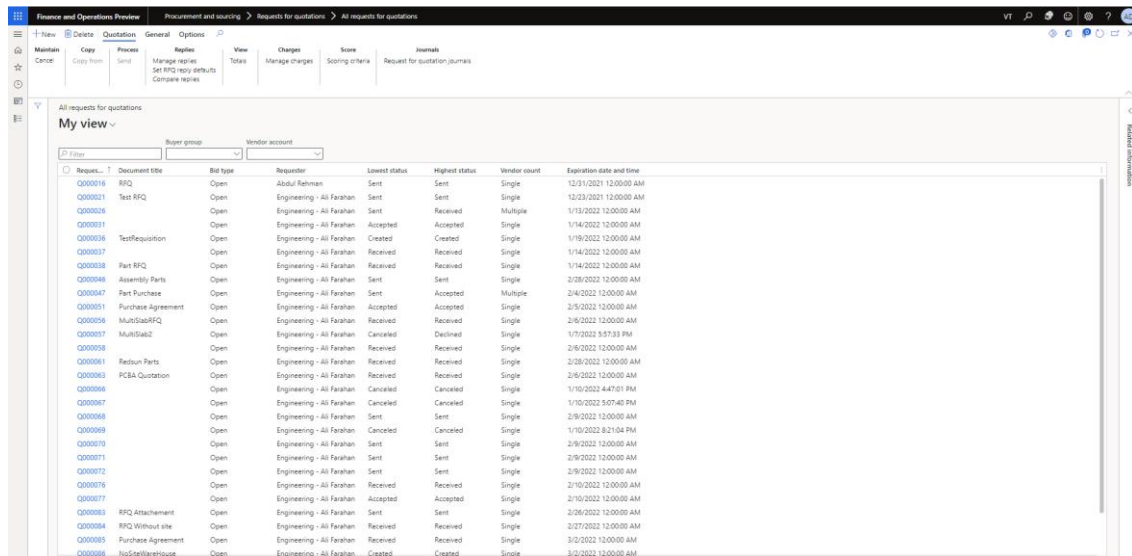


Figure 2. Dynamics 365 - All RFQs



3 Creation of New Request for Quotation

Navigation: Modules > Procurement and Sourcing > All requests for quotations > New

To create new request for quotation, select the 'New' option located on the top left. Add up the details in the fields. In the Purchase type field, three options will be available:

1. Purchase Order
2. Purchase Requisition
3. Purchase agreement

In **Purchase Order** option, it is the kind of purchase type that confirms the offer to buy products or the acceptance of an offer to sell products in exchange for payment.

In **Purchase Requisition** option, this type is selected automatically if the RFQ is created directly from a purchase requisition. If this option is selected manually, an error will be encountered.

In **Purchase Agreement** option, in this type of agreement to purchase a specific quantity or value of product over some particular time. If this option is selected, then select the date range that applies to the purchase agreement.

In the **Document title** field, type a value.

In the **Solicitation type** field, select the RFQ – Raw Material option. It is used to purchase raw materials.

Request...	Purchase type	Document title	Solicitation type	Bid type	Requester	Lowest status	Highest status	Vendor count	Expiration date and time
Q000016	Purchase order	Test RFQ	RFQ - Raw Material	Open	Abdul Rahman	Accepted	Accepted	Single	1/28/2022 12:00:00 AM
Q000021	Purchase order	Test RFQ2	RFQ - Raw Material	Open	Abdul Rahman	Accepted	Accepted	Single	1/28/2022 12:00:00 AM
Q000022	Purchase order	Test RFQ3	RFQ - Raw Material	Open	Abdul Rahman	Accepted	Accepted	Single	1/28/2022 12:00:00 AM
Q000026	Purchase order	Test RFQ 4	RFQ - Raw Material	Open	Abdul Rahman	Accepted	Accepted	Single	1/28/2022 12:00:00 AM
Q000028	Purchase order	Test RFQ Creation	RFQ - Raw Material	Open	Abdul Rahman	Created	Cancelled	Single	2/22/2022 6:11:25 PM
Q000031	Purchase order		RFQ - Raw Material	Open	Abdul Rahman	Created	Sent	Single	1/28/2022 12:00:00 AM
Q000032	Purchase order	Business Quotation for R&I	RFQ - Raw Material	Open	Naseem Sheikhzad	Accepted	Accepted	Single	2/2/2022 12:00:00 AM
Q000033	Purchase order	Door Panels	RFQ - Raw Material	Open	Abdul Rahman	Sent	Sent	Single	2/2/2022 12:00:00 AM
Q000036	Purchase order	Attachment Test	RFQ - Raw Material	Open	Abdul Rahman	Accepted	Accepted	Single	1/21/2022 12:00:00 AM
Q000041	Purchase order	Default Price Test	RFQ - Raw Material	Open	Abdul Rahman	Created	Cancelled	Single	2/22/2022 6:59:01 PM
Q000046	Purchase order	Harnesses	RFQ - Raw Material	Open	Naseem Sheikhzad	Sent	Sent	Single	1/21/2022 12:00:00 AM
Q000047	Purchase order	Check TradeAgreement P...	RFQ - Raw Material	Open	Abdul Rahman	Created	Created	None	1/21/2022 12:00:00 AM
Q000048	Purchase order	RFQ Without Site	RFQ - Raw Material	Open	Abdul Rahman	Created	Cancelled	Single	2/22/2022 6:07:04 PM
Q000051	Purchase order	FRPs	RFQ - Raw Material	Open	Naseem Sheikhzad	Created	Cancelled	Single	2/22/2022 6:05:10 PM
Q000052	Purchase order		RFQ - Raw Material	Open	Naseem Sheikhzad	Received	Received	Single	1/21/2022 12:00:00 AM
Q000056	Purchase order		RFQ - Raw Material	Open		Created	Created	None	9/19/2022 12:00:00 AM

New request for quotation
General
Request for quotation case: Q000061
Currency: USD
Document title:
Delivery date: 10/17/2022
RFQ Expiry Date: 10/17/2022 12:00:00 AM
Delivery address
Delivery name: Venturetronics
Address: Tariq Iqbal Road, Punjab University Employees CHS, Rawwind Link Road, Lahore/Punjab 54770 Pak
Site:
Warehouse:
Additional information
ADMINISTRATION
Requester:
Method of payment:
Mode of delivery:
Incoterms:
Payment Terms:
OK Cancel

Figure 3. Enter the required details in the header panel



3.1 Request for Quotation – Lines

Navigation: Modules > Procurement and Sourcing > All requests for quotations > New > Lines

After adding the basic information about your RFQ, you will specify the parts or categories that you want vendors to bid on. In the line type field, select the line is an “**item**” or “**Category**”. Line number will be automatically generated by the system. Select the Item number/item category in the item number field. Select the desired warehouse and site in the ‘**site**’ and ‘**warehouse**’ category.

The screenshot shows the Dynamics 365 interface for creating a Request for Quotation (RFQ). The 'Request for quotation lines' section is highlighted with a red box. It contains a table with the following columns: Line number, Part Number, Rev, Description, Quantity, Site, Warehouse, Status, and Unit. A single line is listed with the following details: Line number 000002, Part Number A, Description Assembly Mfr/Cap bank Shorting, Quantity 1.00, Site VT-LHR, Warehouse VT-LHR/Main, Status Created, and Unit ea. The 'Add line' button is also visible above the table.

Figure 4. Enter the details in the quotation lines

3.2 Request for Quotation – Header

Navigation: Modules > Procurement and Sourcing > All requests for quotations > New > Header

Enter the details in the header panel. In the vendor tab, select the vendors to send the bid invites. Enter any RFQ related details in the RFQ description. To add a vendor, click on the ‘Add’ button and click the drop down in the ‘Vendor Account’ and select the vendor. Repeat this process until you have selected all the desired vendors for the specific bid. After selecting vendors, the data on the other field will auto-populate. The ‘Lowest’ and ‘Highest status’ fields will be used to show which of the vendor’s bids selected. The ‘Rank’ and ‘Total score’ fields will be active after we enter replies for our vendors.

The screenshot shows the Dynamics 365 interface for creating a Request for Quotation (RFQ) Header. The 'Request for quotation header' section is highlighted with a red box. It contains a 'Note' field and a 'Vendor' table. The 'Vendor' table has columns: Vendor account, Name, Status, Contact, Telephone, and Email. A single vendor is listed with the following details: Vendor account 000002, Name A, Status Created, and Contact, Telephone, and Email fields.

Figure 5. RFQ – Header panel



Add the currency and payment fields. Also add the details in the financial dimensions.

Figure 6. RFQ - Price Discount & financial dimension

3.3 Send the RFQ

Navigation: Modules > Procurement and Sourcing > All requests for quotations > Process > Send

To send the RFQ, click the **“Quotation”** tab available on the top. In the Sending request for quotation page, check that the vendors in the list are the ones that you want to send the RFQ.

Figure 5. After entering all details, click on the ‘Send’ button



4 Response on RFQ confirmation from Vendor

4.1 RFQ Status

Navigation: Modules > Procurement and Sourcing > All requests for quotations

After the RFQ received or accepted by designated vendor, the labels of lowest and highest status will be changed from sent to received.

The status of a request for quotation (RFQ) is shown in the RFQ header and depends on the statuses of the RFQ lines. The status specifies the extent to which you have processed the RFQ. Each RFQ has two values for the status: lowest and highest. The lowest status is the least advanced stage of any line in the RFQ and the highest status is the most advanced stage of any line in the RFQ. For example, if the least advanced stage in an RFQ is for a line that has been created, the lowest status for the RFQ is Created. If the most advanced stage in the RFQ is for a line that has been sent to vendors, the highest status for the RFQ is Sent. The statuses are automatically updated as you process an RFQ.

Request...	Purchase type	Document title	Solicitation type	Bid type	Requester	Lowest status	Highest status	Vendor count	Expi
Q000016	Purchase order	Test RFQ	RFQ - Raw Material	Open	Abdul Rehman	Accepted	Accepted	Single	1/28/21
Q000021	Purchase order	Test RFQ2	RFQ - Raw Material	Open	Abdul Rehman	Accepted	Accepted	Single	1/28/21
Q000022	Purchase order	Test RFQ3	RFQ - Raw Material	Open	Abdul Rehman	Accepted	Accepted	Single	1/28/21
Q000026	Purchase order	Test RFQ 4	RFQ - Raw Material	Open	Abdul Rehman	Accepted	Accepted	Single	1/28/21
Q000027	Purchase order	RFQ Test 5	RFQ - Raw Material	Open	Abdul Rehman	Created	Created	Single	1/28/21
Q000028	Purchase order	Test RFQ Creation	RFQ - Raw Material	Open	Abdul Rehman	Received	Received	Single	1/28/21

Figure 6. Status of RFQ



4.2 Accepting RFQ

Navigation: Modules > Procurement and Sourcing > All requests for quotations > Reply > Process > Accept

After the vendor response, accept the quote that is submitted by the vendor.

The screenshot shows the Dynamics 365 interface for accepting a quote. The left sidebar shows the 'Process' tab with 'Accept' selected. The main area displays the 'Purchase quotation header' for 'Q000022 : Beijing Red Sun Technology Co.,Ltd'. The header includes fields for 'Requester' (Abdul Rehman), 'Bid type' (Open), 'Vendor account' (Beijing Red Sun), 'Bid submitter' (Gao Yan), 'Document title' (Test RFQ Creation), and 'Solicitation type' (RFQ - Raw Material). The 'CONTACT INFORMATION' section shows 'Contact', 'Email', and 'Telephone' (0086-18600990778). Below the header is the 'Purchase quotation lines' section, which contains a table with one line item.

Mark	Line type	Line number	Procurement category	Product number	Item number	Size	Color
	Item	1		P100001 : A : -	P100001	A	

Figure 7. Accept the Quote shared by Vendor