**Functional Design Document**

Price estimation and Proposal

Microsoft Dynamics Business Central Implementation

Project Name – MSME

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Prepared for – MISTER SHADES

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DOCUMENT HISTORY

**Change Record**

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| **Date** | **Author** | **Version** | **Revision Notes** |
|  | Ankur Mishra | 1.0 |  |
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**Reviewers**

| **Name** | **Position** | **Version Approved** | **Date** |
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1. Price estimation and Proposal

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| --- | --- |
| **Requirement** | **Price estimation and Proposal** |
| **FRD Reference** | SP5.3 |
| **GAP/FIT Reference** |  |
| **Functional Process**:   * Sales Quote will be created in the system attaching the Contact created from request and Enquiry made. * BOQ will be uploaded in the system against this sales quote based on item number from the application and Item number 2 in the system items will be identified and update in the estimation sheet. * All these entries populated will be summarized based on drawing number mentioned in BOQ. * Structure details will be specified against the drawings with summarized values. * A fixed percentage over and above the will be added as Margin and overhead, to calculate the Proposal price * After approval Sales quote will be sent as Proposal. | |
| **Assumptions / Challenges:** | |
| **Technical Design:**   * Sales quote will be renamed to Proposal for ease in access of User * In “Item master (Table 27)”, Field “No. 2 (Field 2)” will be renamed to Company code. * A Table and a Page will be created with the name “Estimation Sheet”. And the page will be provided as Function in the Sales quote. * XML port will be created to upload the data in the Estimation sheet and provided as function to the Estimation sheet. XML port will contain following fields: -  1. Drawing number 2. Company Code 3. Item description and Specification 4. Unit of measure 5. Quantity  * Estimation sheet will have Following field: -  |  |  |  |  | | --- | --- | --- | --- | | **Sr. no** | **Field Name** | **Description** | **Remark** | | 1 | Quote no. | Sales Quote against which the estimation is created | Update the Sales quote number from which the Estimation sheet will be opened | | 2 | Drawing number |  | Will get updated from XML port | | 3 | Item Number |  | Company code from the XMP port will be searched in Company code (No. 2) in item master and Item number will be updated with matched Item card.  Field 1 – In Item Master | | 4 | Item Description |  | Will be updated from the Item number updated above  Field 2 – In Item Master | | 5 | Item Description 2 |  | Will be updated from the Item number updated above  Field 3 – In Item Master | | 6 | Company description |  | Will get updated from XML port | | 7 | Unit of Measure |  | Will be updated from the Item number updated above  Field 8 – In Item Master | | 8 | Quantity |  | Will get updated from XML port | | 9 | Unit Price |  | Will be updated from the Item number updated  Unit cost on item master (Field 22) with Margin % specified on item category (customized field on Item category table 5722)  Margin will be percentage of unit cost. | | 10 | Total Cost |  | Quantity x Unit Price |  * In sales and receivable setup (Table 311) field will be created with the name “Sales A/c”, with look up of Chart of Account. * Cost of All the items specified in Estimation sheet will be clubbed based on Drawing number and will be populated in Sales Quote Lines (Table 37). * In Sales Quote Line (Table 37): -  |  |  |  |  | | --- | --- | --- | --- | | **Sr. no** | **Fields in Sales Quote Line** | **New/Standard** | **Value Link** | | 1 | Type | Standard | G/L Account | | 2 | No. | Standard | Sales Account specified in Sales & receivable setup | | 3 | Description | Standard | Drawing no. from Estimation Sheet based on which all the values are consolidated. | | 4 | Location Code | Standard | Value specified in Sales Quote Header (Table 36) | | 5 | Quantity | Standard | 1 | | 6 | Unit of Measure | Standard | Nos | | 7 | Unit of Price Excl. VAT | Standard | Total of the Value against drawing from Estimation sheet | | 8 | Estimations | New | Boolean field will be created to update as yes for lines imported from Estimation sheet. |   Validate all the fields so the value can be updated in rest of the field of Sales Quote Line.   * On Sales Quote header (Table 36) Margin percentage and Overhead percentage will be created to calculate the Margin and Overhead on total cost value on Values imported from Estimation sheet. * On user Setup (Table 91), Option field be given to Specify the department of the user.   Department options will be: -   1. Front Desk 2. Back office Sales 3. Sales 4. Design 5. Project 6. Production 7. Store 8. Management  * Based on Department specified on user setup. Only Management can make changes in Margin and Overhead percentage. * Sales Quote header (Table 36) will contain following fields: -  |  |  |  |  | | --- | --- | --- | --- | | **Sr. No** | **Field name** | **New/Standard** | **Description** | | 1 | No | Standard |  | | 2 | Customer No. | Standard |  | | 3 | Enquiry no. | New | Rename Opportunity No. field | | 4 | Quote Type | New | Option fields with values: - First and revised | | 5 | Revision No. | New |  | | 6 | Scope of Work | New | Flow from attached opportunity (Table 5092) | | 7 | Product Type | New | Flow from attached opportunity (Table 5092) | | 8 | Location Details | New | Flow from attached opportunity (Table 5092) | | 9 | Quote Validity | New | Days | | 10 | Over Head % | New | Percentage field | | 11 | Margin % | New | Percentage field | | 13 | Warranty | New | Boolean field | | 14 | Insurance | New | Boolean field |  * Terms and Conditions   New field – Type of Terms, option type  Table – 44 Sales Comment Line  Value :-   1. Specification 2. Warranty and Documents 3. Insurance 4. Payment Terms 5. General provision 6. Exclusions and limitations | |
| **Data Validations, Manipulations and Sorting:** | |
| **Test Scenarios:**   * Any change in Price or drawing no. in Estimation sheet will be updated in the Sales Quote. * Values of the fields updating from opportunity is coming perfectly. | |