**Functional Design Document**

Purchase Quote preparation and comparison

Microsoft Dynamics Business Central Implementation

Project Name – MSME

Document Name –Purchase Quote preparation and comparison

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Submission Date –

Prepared by – Ankur Mishra

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** |
| --- | --- | --- | --- |
| Ashish Kathpal | Project Lead | 1.0 |  |

**Distribution List**

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1. Purchase Quote preparation and comparison

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| --- | --- |
| **Requirement** | **Purchase Quote preparation and comparison** |
| **FRD Reference** | PP8.5 |
| **GAP/FIT Reference** |  |
| **Functional Requirement Definition**:   * In response to Enquiry Sent by purchase department vendor will send the Quotes. * The Enquiry Sent will be converted to Quote and details given by Vendor about Item, Specification, Make/Brand, Quantity, Prices, Terms/Conditions etc. will be updated on the Quote * All the quotes created with common requisition number will be compared and best will be converted to Order. * Before conversion Quote will be sent for approvals. | |
| **Assumptions / Challenges:** | |
| **Functional Process and Technical Design:**   * **Enquiry Conversion**   On Enquiry page, Function will be given “Convert to Quote” to make the Quote from the Enquiry.   * **Quote Creation**   In **Purchase Quote Header** user will specify: -   |  |  |  |  |  | | --- | --- | --- | --- | --- | | **Sr. No.** | **Field Value** | **New or Standard** | **Remarks** | **Object Details** | | 1 | No. | Standard | Updated from the no. series |  | | 2 | Enquiry no. | New | Enquiry number Quote created from | In Purchase Header Table - 38 | | 3 | Requisition No. | New | Requisition No. on the Enquiry | In Purchase Header Table – 38 | | 4 | Vendor |  | Vendor No. mention on the Enquiry |  | | 5 | Address |  | Will be updated from vendor |  | | 6 | Address 2 |  | Will be updated from vendor |  | | 7 | Post Code |  | Will be updated from vendor |  | | 8 | City |  | Will be updated from vendor |  | | 9 | Phone No. |  | Will be updated from vendor |  | | 10 | Type of Purchase | New option field | Values Import, General, Raw material, Branded | In Purchase Header Table – 38 | | 11 | Purchaser Code |  | Updated from the Enquiry |  | | 12 | Promised receipt date |  | Date field updated by User |  | | 13 | Job No. | New Code Field | Updated from the Enquiry | In Purchase Header Table – 38 | | 14 | Job Task No. | New Code Field | Updated from the Enquiry | In Purchase Header Table – 38 | | 15 | Document Date |  | Conversion date of Enquiry to Quote |  | | 16 | Ref. No | New text field | Text field to specify Vendor Quote number | In Purchase Header Table – 38 | | 17 | Remarks | New text field | To specify the reason for converting in Order. | In Purchase Header Table – 38 |   On Line user will specify: -   |  |  |  |  |  | | --- | --- | --- | --- | --- | | **Sr. No** | **Field value** | **Description** | **Remark** | **Object ID** | | 1 | Type |  | Will be updated from the Enquiry lines selected |  | | 2 | No. |  | Will be updated from the Enquiry lines selected |  | | 3 | Quantity |  | Will be updated from the Enquiry lines selected and user can change it too. |  | | 4 | Unit of Measure |  | Will be updated from the Enquiry lines selected |  | | 5 | location |  | Will be updated from the Enquiry lines selected |  | |  | Brand | New Text field | User will mention the brand specified in the quote |  | | 6 | Direct unit cost Excl. VAT |  | User will specify the price manually |  | | 7 | Planned receipt date |  | Will be updated from Promised receipt date in header |  | | 8 | Job No. |  | Will be updated from the Enquiry lines selected |  | | 9 | Job task No. |  | Will be updated from the Enquiry lines selected |  | | 10 | Job Planning Line No. |  | Will be updated from the Enquiry lines selected |  |  * **Terms and Conditions**   Purch. Comment line – Table 43  New Option Field: - Type of Condition  Value -   * **Validation**   On Purchase & Payable Setup (Table 312) create field “Minimum No. of Quote.  Based on the number specified here at the time of conversion system will check the count of Quote created against the requisition number mention in Header.   * **Comparison**   Quote Comparison report will be created to Run on Requisition number and will bring the Quote wise data for all the quotes created against the select requisition.   |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | **Company Name** | | | | | | | | | | | | | | **Requisition No.** | REQ00001 | |  | | | | | | | | | | | **Requisition Date** | 24-1-2019 |  | | | | | | | | | | | |  | 1st Quote | | | 2nd Quote | | | 3rd Quote | | | 4th Quote | | | | Item Number | Qty | Price | Total | Qty | Price | Total | Qty | Price | Total | Qty | Price | Total | |  |  |  |  |  |  |  |  |  |  |  |  |  | | IT001 |  |  |  |  |  |  |  |  |  |  |  |  | | IT002 |  |  |  |  |  |  |  |  |  |  |  |  | | IT003 |  |  |  |  |  |  |  |  |  |  |  |  | |  |  |  |  |  |  |  |  |  |  |  |  |  | |  |  |  |  |  |  |  |  |  |  |  |  |  | | Vendor Name |  | | |  | | |  | | |  | | | | Payment Terms |  | | |  | | |  | | |  | | | | Delivery date |  | | |  | | |  | | |  | | | | Shipping terms |  | | |  | | |  | | |  | | | | |
| **Data Validations, Manipulations and Sorting:** | |
| **Test Scenarios:**   * Value specified in the Enquiry are getting update properly in Quote Header and Line. * Create Quotes and on Purchase & Payable setups specify the “Minimum number of Quotes” . | |