

CETAS VMP365

No. Series Setup Document

For Microsoft Dynamics 365 Business Central

1. Introduction

A company spends a major part of its revenue to establish a proper supplier-procurement team communication. This communication plays a vital role in improving the efficiency and productivity of a company. The VMP365 focusses on the elimination of spending time over the phone/email for Supplier queries, updates, amendments, status, Statement of Account and Payment reconciliations.

The VMP365 eliminates the need for manual management and updating of purchase documents like Purchase RFQ'S, Purchase quotes, Purchase invoices and GRNs and thus controls data duplications and accuracy issues.

Thus, the VMP365 helps vendors and the procurement department of a company by providing an easy, flexible, seamlessly integrated and highly secure Self-service portal.

2. Purpose of the Document

The scenario documentation of VMP365 module shows the different scenarios an end user will go through. It shows the Prerequisites required for various configurations to ensure the smooth functioning of the app.

3. Creation of Purchase Documents

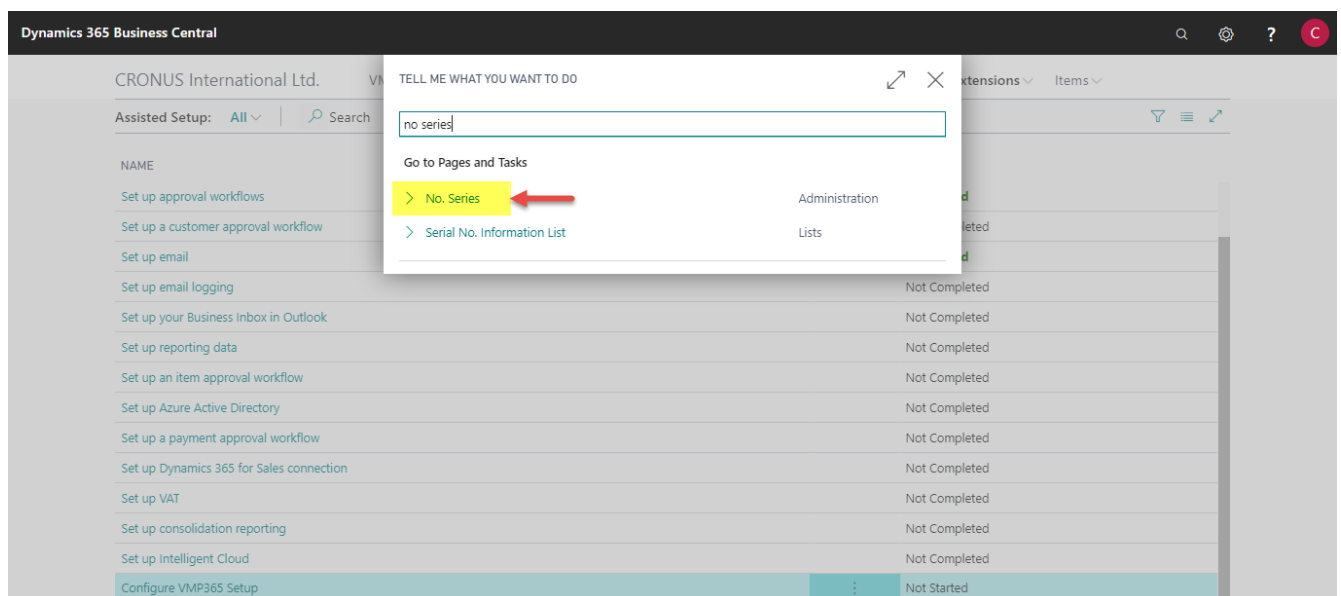
(Creation of purchase indent/purchase RFQ/Purchase quote/ order)

Prerequisites

- A No. series in the purchase & payables setup

Guidelines

- **Step 1:** Go to the “no. series” setup



- **Step 2:** Define a no. Series for the respective purchase document

Dynamics 365 Business Central

NO. SERIES | WORK DATE: 28-01-2021

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CODE	DESCRIPTION	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO. USED	DEF. NOS.	MAN. NOS.	DATE ORD...
P-BLK	Blanket Purchase Order	1001	2999	28-01-2021	1019	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
P-CR	Purchase Credit Memo	1001	2999	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
P-CR+	Posted Purchase Credit Memo	109001	1010999	28-01-2021	109003	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PHYS-INV	Physical Inventory Order	PHI000001	PHI099999	-	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PHYS-INV+	Posted Phys. Invent. Order	PPHI00001	PPHI99999	-	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
P-INV	Purchase Invoice	1001	2999	28-01-2021	1030	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
P-INV+	Posted Purchase Invoice	108001	109999	10-09-2019	108067	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
P-ORD	Purchase Order	106001	107999	28-01-2021	106096	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
P-ORD-D	Purchase Order (Dist)	6001	7999	05-01-2021	6005	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
P-ORD-D1	Purchase Order (Dist)	104001	105999	31-01-2021	104012	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
P-QUO	Purchase Quote	1001	2999	28-01-2021	1005	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
P-RCPT	Purchase Receipt	107001	108999	10-09-2019	107070	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PREQ	Purch.Requisition	PRQ001	-	28-01-2021	PRQ040	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
P-RETORD	Purchase Return Order	1001	2999	28-01-2021	1009	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PRODBOM	Production BOMs	P00010	P99990	-	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
P-SHPT	Posted Purchase Shipment	105001	106999	28-01-2021	105003	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
RES	Resource	R0010	R9990	-	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
RFQ	Requisition	RFQ001	-	16-09-2019	RFQ078	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
RFQ001		-	-	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
RJNL-GEN	Resource Journal	R00001	R01000	-	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- **Step3:** Specify the no. series for the respective document in the purchase & payables setup

Dynamics 365 Business Central

NO. SERIES | WORK DATE: 28-01-2021

Purchases & Payables Setup

Vendor Posting Groups Incoming Documents Setup Show Attached

Number Series Show less

Vendor Nos.	VEND	Posted Credit Memo ...	P-CR+
Quote Nos.	P-QUO	Posted Receipt Nos.	P-RCPT
Blanket Order Nos.	P-BLK	Posted Return Shpt. ...	P-SHPT
Order Nos.	P-ORD	Posted Prepmt. Inv. N...	P-INV+
Return Order Nos.	P-RETORD	Posted Prepmt. Cr. M...	P-CR+
Invoice Nos.	P-INV	Purch. Requisition Nos.	PREQ
Posted Invoice Nos.	P-INV+	Purch. RFQ Nos.	RFQ
Credit Memo Nos.	P-CR		

Background Posting >

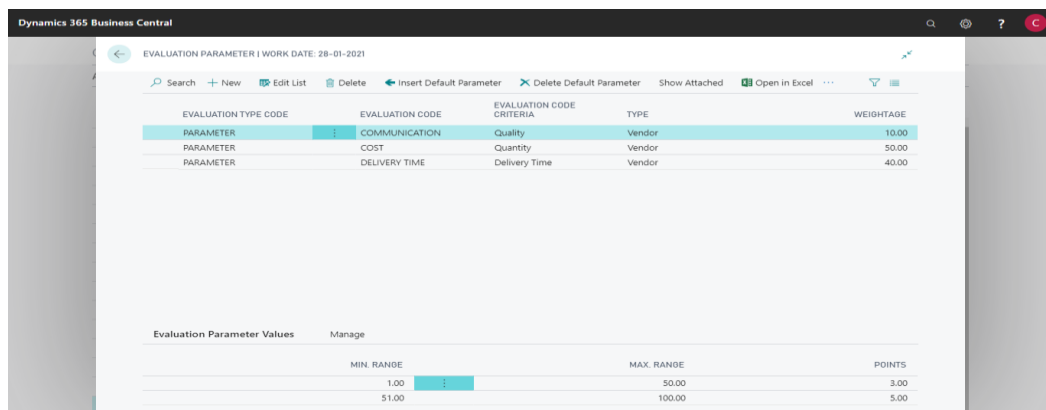
Archiving >

4. Evaluation Parameters

The Evaluation Parameters has to have specific values in order for it to work properly.

Guidelines

- There are three parameters with which the vendor rating calculated. They are i) Quality ii) Quantity iii) Delivery time.
- The delivery time is calculated automatically by the system and hence a default configuration is recommended for defining its range. The following Screenshot shows the recommended ranges.



The screenshot displays the 'EVALUATION PARAMETER' list in Dynamics 365 Business Central. The table below shows the parameters and their recommended ranges.

EVALUATION TYPE CODE	EVALUATION CODE	EVALUATION CODE CRITERIA	TYPE	WEIGHTAGE
PARAMETER	COMMUNICATION	Quality	Vendor	10.00
PARAMETER	COST	Quantity	Vendor	50.00
PARAMETER	DELIVERY TIME	Delivery Time	Vendor	40.00

MIN. RANGE	MAX. RANGE	POINTS
1.00	50.00	3.00
51.00	100.00	5.00

5. Terms and conditions & Comparison Parameters

Prerequisites

- A No. series in the inventory setup

Guidelines

- **Step 1:** Go to the “no. series” setup
- **Step 2:** Define a no. Series for the Terms and condition/Comparison Parameter
- **Step 3:** Specify the created no. series’ in the inventory setup

