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.
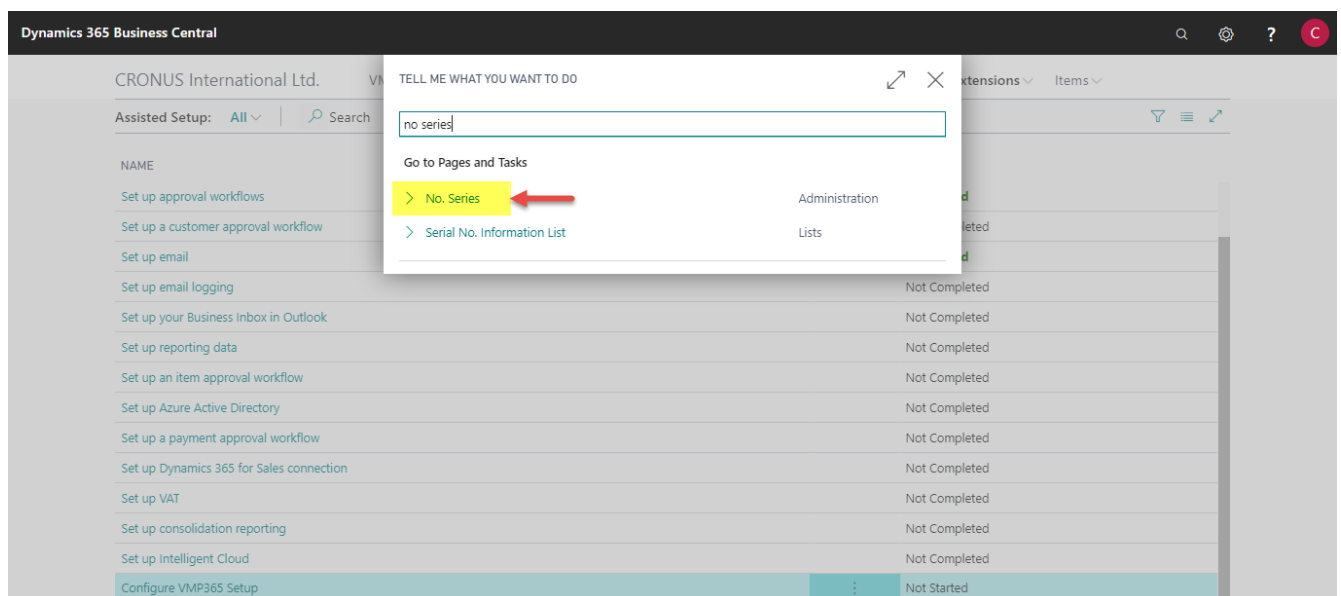
3. Creation of Purchase Documents

(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

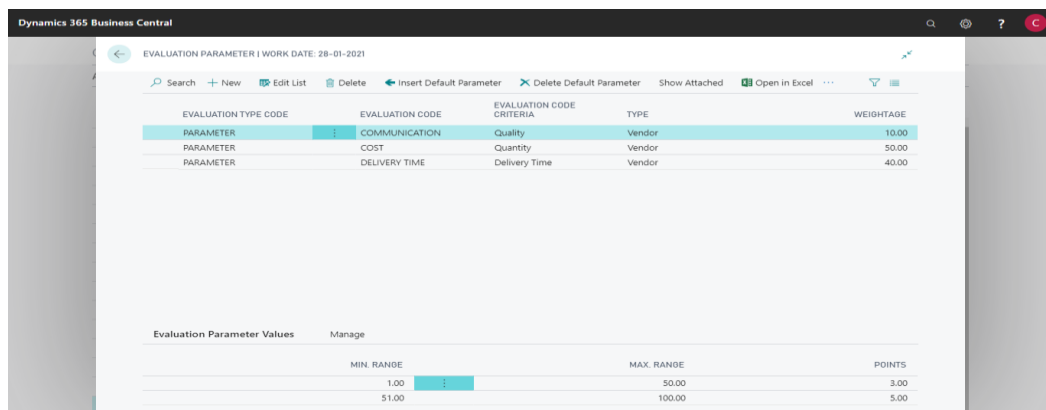- **Step3:** Specify the no. series for the respective document in the purchase & payables setup

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.

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