

Acumens Procure-to-Pay Functionality Document

All versions: MS Dynamics NAV & BC

Prepared & Developed by

SBC Dynamics ERP

Document History

Revision History:

VERSION	DATE	SECTIONS REVISED	DESCRIPTION
1.0	12-23-2025		Document Prepared

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ACUMENS PROCURE-TO-PAY

Acumens Procure-to-Pay app extends standard Business Central Purchasing process by introducing internal Requisition documents, Request for Quotations, Bid Management and Vendor Performance Evaluations.

Features included in this app are below:

- Purchase Requisitions
- Request for Quotations
- Bid Analysis
- Vendor Evaluations
- RFQ Mandatory on Purchase Orders
- Storage Requisitions

1. Purchase Requisitions

This is an internal request document used by company employees to request the purchasing department to buy good or services.

Dynamics 365 Business Central

Enrollment Sandbox/CS

Purchase Requisition

PREQ0004 · 2026 Requisitions

Home | Print | Request Approval | Requisition | Automate | Fewer options

Close Requisition | Release

General

No. PREQ0004

Location Code

Document Date 12/21/2025

Amount 0.00

Requested Receipt Date 12/21/2025

Amount(LCY) 0.00

Employee No. E0010

Description 2026 Requisitions

Employee Name John Doe

Status Open

Department Code ADM

User ID DEVELOPER

Customergroup Code MEDIUM

Assigned User ID

Lines

New Line | Delete Line | Dimensions | Specification Attributes

Requisition Type	Requisition Code	Description	Additional Comments	Has Specif...	Inventory	Quantity	Unit of Measure	Delivery Location Code	Estimated Unit Cost	Total Estimated Cost	Purchase Order No.	Department Code	Custom Code
Item	1029	Note Books	AS Note Books supplied mont...	No	0.00	30	PCS		2.00	60.00		ADM	MEDIU
Item	1030	Diaries	2026 Diaries	No	0.00	30	PCS		10.00	300.00		ADM	MEDIU
Item	1027	Cleaning Services	for 12 Months (Jan to Dec)	No	0.00	20	DAY		50.00	1,000.00		ADM	MEDIU
Item	1028	Internet Subscription	for 12 Months (Jan to Dec)	No	0.00	1	MON		100.00	100.00		ADM	MEDIU

Assigned >

A purchase requisition can be done for Items, Fixed Assets and Services (G/L Accounts mapped to service codes)

Services:

Dynamics 365 Business Central

Enrollment Sandbox/CS

Acumens Procure T

Services

Services: All

Requisition Type ↑

Service

Services

New | Edit List | Delete | More options

Requisition Type	Requisition Code ↑	Type	No.	Name	Description
Service	ENT	G/L Account	72130	Entertainment of personnel	

Once a Purchase Requisition is Released (manual release or through Approval), the document is ready to process an RFQ for it.

Dynamics 365 Business Central

Instrument
SandboxesCS

BD

Purchase Requisition

PREQ0004 · 2026 Requisitions

✓ Saved

Home

Print

Request Approval

Requisition

Automate

Fewer options

General

No. PREQ0004

Location Code CA

Document Date 12/21/2025

Amount 22,460.00

Requested Receipt Date 12/21/2025

Amount(LCY) 22,460.00

Employee No. 10010

Description 2026 Requisitions

Employee Name John Doe

Status Released

Department Code ADM

User ID DEVELOPER

Customergroup Code MEDIUM

Assigned User ID

Lines

Manage

Requisition Type	Requisition Code	Description	Additional Comments	Has Specifi...	Inventory	Quantity	Unit of Measure	Delivery Location Code	Estimated Unit Cost	Total Estimated Cost	Purchase Order No.	Department Code	Custom Code
→ Item	1009	Note Books	AS Note Books supplied mont...	No	0.00	30	PCS	CA	2.00	60.00		ADM	MEDU
Item	1030	Diaries	2026 Diaries	No	0.00	30	PCS	CA	10.00	300.00		ADM	MEDIU
Item	1027	Cleaning Services	for 12 Months (Jan to Dec)	No	0.00	20	DAY	CA	50.00	1,000.00		ADM	MEDIU
Item	1028	Internet Subscription	for 12 Months (Jan to Dec)	No	0.00	1	MON	CA	100.00	100.00		ADM	MEDIU
Service	ENT	Entertainment of personnel	Team Buidling	No	0.00	2	CA	CA	500.00	1,000.00		ADM	MEDIU
Fixed Asset	FA000020	Delivery Truck	YOM 2025	No	0.00	1	CA	CA	20,000.00	20,000.00		ADM	MEDIU

2. Request for Quotations

This is an external facing document used by the purchasing department to request vendors for quotations.

The screenshot shows the 'Request for Quotation' form for RFQ0002. The form is titled 'RFQ0002 · 2026 Requisitions'. The 'General' tab is active, showing fields for No., Document Date, RFQ Date, Issue Date, Closing Date, Closing Date for Inquiry, Submission Email Address, Submission Time, Point of Contact, Type, Amount, Description, Status, RFQ Enquiries Email Address, cc Email Addresses, Additional Email Body, User ID, and RFQ Terms & Conditions. The 'Lines' tab is also visible, showing a table of requisition lines.

Requisition Type	Requisition Code	Description	Unit of Measure Code	Quantity	Location Code	Unit Cost	Total Cost	Department Code	Customer Group Code
Item	1029	Note Books	PCS	30	CA	2.00	60.00	ADM	MEDIUM
Item	1030	Diaries	PCS	30	CA	10.00	300.00	ADM	MEDIUM
Item	1027	Cleaning Services	DAV	20	CA	50.00	1,000.00	ADM	MEDIUM
Item	1028	Internet Subscription	MON	1	CA	100.00	100.00	ADM	MEDIUM
Service	ENT	Entertainment of personnel		2	CA	500.00	1,000.00	ADM	MEDIUM
Fixed Asset	FA000020	Delivery Truck		1	CA	20,000.00	20,000.00	ADM	MEDIUM

RFQ is created for Approved Purchase Requisitions:

The screenshot shows the 'Request for Quotation' form for RFQ0002. The 'General' tab is active, showing fields for No., Document Date, RFQ Date, Issue Date, Closing Date, Closing Date for Inquiry, Submission Email Address, Submission Time, Point of Contact, Type, Amount, Description, Status, RFQ Enquiries Email Address, cc Email Addresses, Additional Email Body, User ID, and RFQ Terms & Conditions. The 'Lines' tab is also visible, showing a table of requisition lines. A red box highlights the 'Get Requisition Lines' button. Below the form, a table titled 'Submitted Requisition Lines' is shown, listing the requisition lines for the RFQ.

Document No. Y	Document Date	Employee No.	Employee Name	Requisition Type	Requisition Code	Description	Delivery Location Code	Unit of Measure	Quantity	Estimated Unit Cost	Total Estimated Cost	Department Code	Customer Group Code	Request for Quotation No.
→ PREQ0004	12/21/2025	E0010	John Doe	Item	1029	Note Books	CA	PCS	30	2.00	60.00	ADM	MEDIUM	
PREQ0004	12/21/2025	E0010	John Doe	Item	1030	Diaries	CA	PCS	30	10.00	300.00	ADM	MEDIUM	
PREQ0004	12/21/2025	E0010	John Doe	Item	1027	Cleaning Services	CA	DAV	20	50.00	1,000.00	ADM	MEDIUM	
PREQ0004	12/21/2025	E0010	John Doe	Item	1028	Internet Subscription	CA	MON	1	100.00	100.00	ADM	MEDIUM	
PREQ0004	12/21/2025	E0010	John Doe	Service	ENT	Entertainment of personnel	CA		2	500.00	1,000.00	ADM	MEDIUM	
PREQ0004	12/21/2025	E0010	John Doe	Fixed Asset	FA000020	Delivery Truck	CA		1	20,000.00	20,000.00	ADM	MEDIUM	

Dynamics 365 Business Central | Request for Quotation | RFQ0002 · 2026 Requisitions

Home | Prepare | Print/Send | Request Approval | RFQ | Automate | Fewer options

Attachments | Invited Vendor(s) | Requested Purchase Requisition

General

No.	RFQ0002	Amount	22,460.00
Document Date	12/22/2025	Description	2026 Requisitions
RFQ Date	12/22/2025	Status	Open
Issue Date	12/31/2025	RFQ Enquiries Email Address	developer@sbodydynamicserp.com
Closing Date	1/31/2026	cc Email Addresses	betty@sbodydynamicserp.com
Closing Date for Inquiry	1/15/2026	Additional Email Body	Mandatory Documents: Business Registration Tax Registration Certificate
Submission Email Address	developer@sbodydynamicserp.com	User ID	DEVELOPER
Submission Time	10:00:00 AM	RFQ Terms & Conditions	
Point of Contact	Betty Too	RFQ Terms	Yes
Type	RFQ		

Lines

Requisition Type	Requisition Code	Description	Unit of Measure Code	Quantity	Location Code	Unit Cost	Total Cost	Department Code	Customergr... Code
Item	1029	Note Books	PCS	30	CA	2.00	60.00	ADM	MEDIUM
Item	1030	Diaries	PCS	30	CA	10.00	300.00	ADM	MEDIUM
Item	1027	Cleaning Services	DAY	20	CA	50.00	1,000.00	ADM	MEDIUM
Item	1028	Internet Subscription	MON	1	CA	100.00	100.00	ADM	MEDIUM
Service	ENT	Entertainment of personnel		2	CA	500.00	1,000.00	ADM	MEDIUM
→ Fixed Asset	FA000020	Delivery Truck		1	CA	20,000.00	20,000.00	ADM	MEDIUM

Note: You can have multiple Purchase Requisitions in one RFQ.

RFQ Terms are also defined on the RFQ Document

Dynamics 365 Business Central | Request for Quotation | RFQ0002 · 2026 Requisitions

Home | Prepare | Print/Send | Request Approval | RFQ | Automate | Fewer options

Close | Release |

General

No.	RFQ0002	Amount	0.00
Document Date	12/22/2025	Description	2026 Requisitions
RFQ Date	12/22/2025	Status	Open
Issue Date	12/31/2025	RFQ Enquiries Email Address	developer@sbodydynamicserp.com
Closing Date	1/31/2026	cc Email Addresses	betty@sbodydynamicserp.com
Closing Date for Inquiry	1/15/2026	Additional Email Body	Mandatory Documents: Business Registration Tax Registration Certificate
Submission Email Address	developer@sbodydynamicserp.com	User ID	DEVELOPER
Submission Time	10:00:00 AM	RFQ Terms & Conditions	
Point of Contact	Betty Too	RFQ Terms	Yes
Type	RFQ		

Lines

Requisition Type	Requisition Code	Description	Unit of Measure Code	Quantity	Location Code	Unit Cost	Total Cost	Department Code	Customergr... Code
→ Item				0		0.00	0.00		

Required Documents

Document Code 1	Document Description	Mandatory
→		<input type="checkbox"/>

Dynamics 365 Business Central

Request for Quotation: RFQ0002 · 2026 Requisitions

Home | Prepare | Print/Send | Request Approval | RFQ | Automate | Fewer options

Close | Release

General

No.: RFQ0002 | Amount: 0.00
 Document Date: 12/22/2025 | Description: 2026 Requisitions
 RFQ Date: 12/22/2025 | Status: Open
 Issue Date: 12/31/2025 | RFQ Enquiries Email Address: developer@sbcdynamicserp.com
 Closing Date:
 Closing Date for Inquiry:
 Submission Email Address:
 Submission Time:
 Point of Contact:
 Type:

Enter RFQ Terms & Conditions

RFQ Terms: 1. Quotation Validity
 Quotations must remain valid for at least 30 days from the closing

OK | Cancel

Lines | New Line | Delete Line | Dimensions

Requisition Type	Requisition Code	Description	Unit of Measure Code	Quantity	Location Code	Unit Cost	Total Cost	Department Code	Customer Group Code
Item				0		0.00	0.00		

Required Documents | New Line | Delete Line

Document Code	Document Description	Mandatory
		<input type="checkbox"/>

RFQ Vendors are defined on the RFQ Document and an email with RFQ details sent to the defined vendors once the document is released (manual release or through approval).

Dynamics 365 Business Central

Request for Quotation: RFQ0002 · 2026 Requisitions

Home | Prepare | Print/Send | Request Approval | RFQ | Automate | Fewer options

Get Requisition Lines | RFQ Vendors

General

No.: RFQ0002 | Amount: 22,460.00
 Document Date: 12/22/2025 | Description: 2026 Requisitions
 RFQ Date: 12/22/2025 | Status: Closed
 Issue Date: 12/31/2025 | RFQ Enquiries Email Address: developer@sbcdynamicserp.com
 Closing Date: 1/31/2026 | cc Email Addresses: betty@sbcdynamicserp.com
 Closing Date for Inquiry: 1/15/2026 | Additional Email Body: Mandatory Documents: Business Registration Certificate, Tax Registration Certificate, Bank Statement
 Submission Email Address: developer@sbcdynamicserp.com
 Submission Time: 10:00:00 AM
 Point of Contact: Betty Too | User ID: DEVELOPER
 Type: RFQ | RFQ Terms & Conditions: Yes

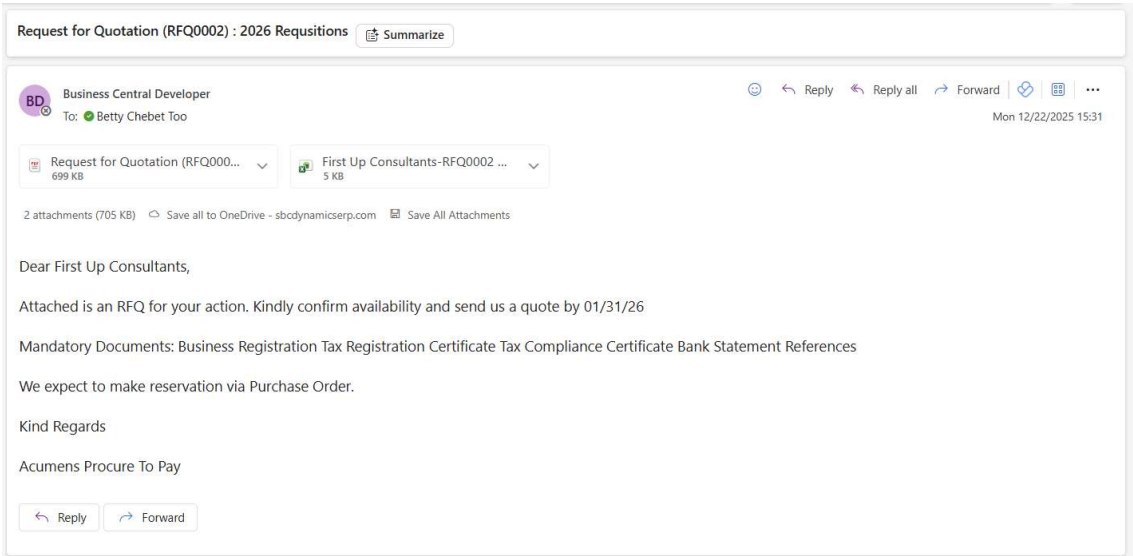
Dynamics 365 Business Central

RFQ Vendors

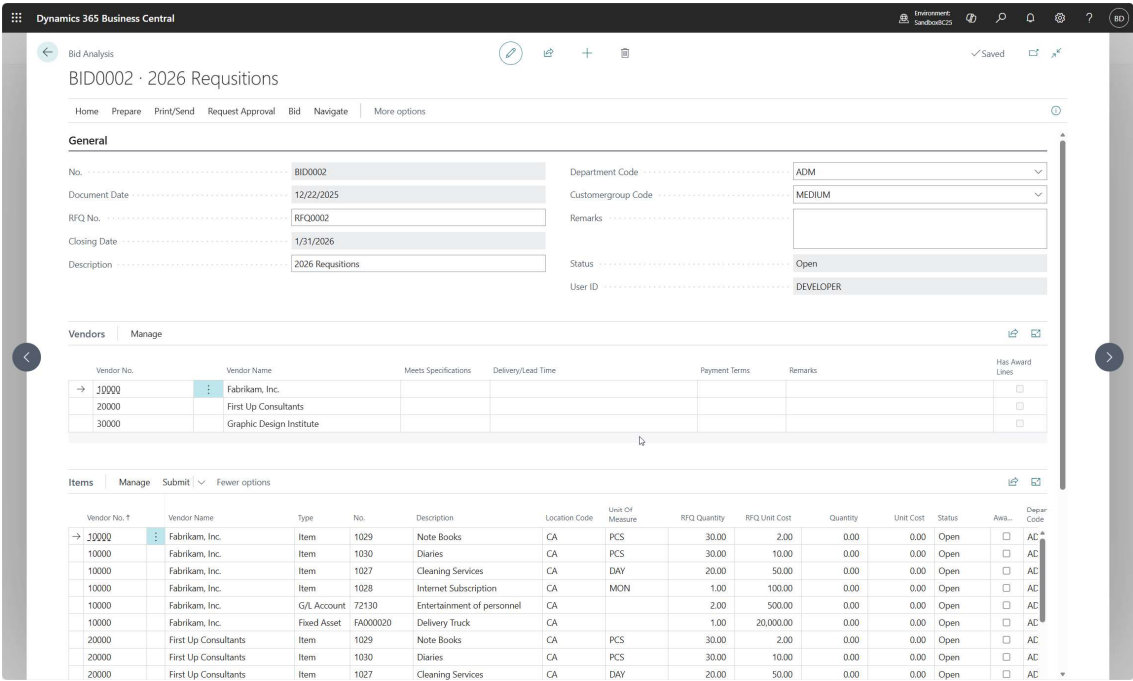
Save | New | Edit List | Delete | Reports | More options

Vendor No.	Vendor Name	Not Listed Vendor	Vendor Email Address
10000	Fabrikam, Inc.		developer@sbcdynamicserp.com
20000	First Up Consultants		betty@sbcdynamicserp.com
30000	Graphic Design Institute		bryce.jasso@contoso.com

Sample Email:



Bid Analysis Document is also auto created when RFQ Emails are sent.



3. Bid Analysis

A Bid Document is auto populated once an RFQ is sent to Vendors. This document has all Vendor and Item details that RFQ email was sent to.

The screenshot shows the 'Bid Analysis' form for 'BID0002 - 2026 Requisitions'. The form is divided into sections: General, Vendors, and Items.

General Section:

- No.: BID0002
- Document Date: 12/22/2025
- RFQ No.: RFQ0002
- Closing Date: 1/31/2026
- Description: 2026 Requisitions
- Department Code: ADM
- Customergroup Code: MEDIUM
- Remarks: (Empty text area)
- Status: Open
- User ID: DEVELOPER

Vendors Section:

Vendor No.	Vendor Name	Meets Specifications	Delivery/Lead Time	Payment Terms	Remarks	Has Award Lines
→ 10000	Fabrikam, Inc.					<input type="checkbox"/>
20000	First Up Consultants					<input type="checkbox"/>
30000	Graphic Design Institute					<input type="checkbox"/>

Items Section:

Vendor No. ↑	Vendor Name	Type	No.	Description	Location Code	Unit Of Measure	RFQ Quantity	RFQ Unit Cost	Quantity	Unit Cost	Status	Avail.	Department Code
→ 10000	Fabrikam, Inc.	Item	1029	Note Books	CA	PCS	30.00	2.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
10000	Fabrikam, Inc.	Item	1030	Diaries	CA	PCS	30.00	10.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
10000	Fabrikam, Inc.	Item	1027	Cleaning Services	CA	DAY	20.00	50.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
10000	Fabrikam, Inc.	Item	1028	Internet Subscription	CA	MON	1.00	100.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
10000	Fabrikam, Inc.	G/L Account	72130	Entertainment of personnel	CA		2.00	500.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
10000	Fabrikam, Inc.	Fixed Asset	FA000020	Delivery Truck	CA		1.00	20,000.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
20000	First Up Consultants	Item	1029	Note Books	CA	PCS	30.00	2.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
20000	First Up Consultants	Item	1030	Diaries	CA	PCS	30.00	10.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
20000	First Up Consultants	Item	1027	Cleaning Services	CA	DAY	20.00	50.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
20000	First Up Consultants	Item	1028	Internet Subscription	CA	MON	1.00	100.00	0.00	0.00	Open	<input type="checkbox"/>	ADM

Vendor Quoted prices can be updated manually on Item Lines or updated through excel upload (the excel document that was part of Vendor RQF email attachments).

Manual Update:

This screenshot shows the same 'Bid Analysis' form, but with manual updates to the 'Quantity' and 'Unit Cost' columns for the first item line. These columns are highlighted with a red box.

Items Section (Manual Updates):

Vendor No. ↑	Vendor Name	Type	No.	Description	Location Code	Unit Of Measure	RFQ Quantity	RFQ Unit Cost	Quantity	Unit Cost	Status	Avail.	Department Code
→ 10000	Fabrikam, Inc.	Item	1029	Note Books	CA	PCS	30.00	2.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
10000	Fabrikam, Inc.	Item	1030	Diaries	CA	PCS	30.00	10.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
10000	Fabrikam, Inc.	Item	1027	Cleaning Services	CA	DAY	20.00	50.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
10000	Fabrikam, Inc.	Item	1028	Internet Subscription	CA	MON	1.00	100.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
10000	Fabrikam, Inc.	G/L Account	72130	Entertainment of personnel	CA		2.00	500.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
10000	Fabrikam, Inc.	Fixed Asset	FA000020	Delivery Truck	CA		1.00	20,000.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
20000	First Up Consultants	Item	1029	Note Books	CA	PCS	30.00	2.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
20000	First Up Consultants	Item	1030	Diaries	CA	PCS	30.00	10.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
20000	First Up Consultants	Item	1027	Cleaning Services	CA	DAY	20.00	50.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
20000	First Up Consultants	Item	1028	Internet Subscription	CA	MON	1.00	100.00	0.00	0.00	Open	<input type="checkbox"/>	ADM

Excel Upload:

Bid Analysis

BID0002 · 2026 Requisitions

Home [Prepare](#) [Print/Send](#) [Request Approval](#) Bid [Navigate](#) | [More options](#)

[Upload RFQ Lines](#) [Bid Analysis Worksheet](#) [Create Purchase Order](#)

General >

Vendors >

Items Manage Submit Fewer options

Vendor No.	Vendor Name	Type	No.	Description	Location Code	Unit Of Measure	RFQ Quantity	RFQ Unit Cost	Quantity	Unit Cost	Status	Awa.	Departments Code
→ 10000	Fabrikam, Inc.	Item	1029	Note Books	CA	PCS	30.00	2.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
10000	Fabrikam, Inc.	Item	1030	Diaries	CA	PCS	30.00	10.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
10000	Fabrikam, Inc.	Item	1027	Cleaning Services	CA	DAY	20.00	50.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
10000	Fabrikam, Inc.	Item	1028	Internet Subscription	CA	MON	1.00	100.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
10000	Fabrikam, Inc.	G/L Account	72130	Entertainment of personnel	CA		2.00	500.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
10000	Fabrikam, Inc.	Fixed Asset	FA000020	Delivery Truck	CA		1.00	20,000.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
20000	First Up Consultants	Item	1029	Note Books	CA	PCS	30.00	2.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
20000	First Up Consultants	Item	1030	Diaries	CA	PCS	30.00	10.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
20000	First Up Consultants	Item	1027	Cleaning Services	CA	DAY	20.00	50.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
20000	First Up Consultants	Item	1028	Internet Subscription	CA	MON	1.00	100.00	0.00	0.00	Open	<input type="checkbox"/>	ADM

Excel Sample:

[illegible]

Bid Analysis Worksheet is available for a bigger working space for lines.

Dynamics 365 Business Central

Bid Analysis

BID0002 · 2026 Requisitions

Home Prepare Print/Send Request Approval Bid Navigate More options

Upload RFQ Lines Bid Analysis Worksheet Create Purchase Order

General

Vendors

Items Manage Submit Fewer options

Vendor No. ↑	Vendor Name	Type	No.	Description	Location Code	Unit Of Measure	RFQ Quantity	RFQ Unit Cost	Quantity	Unit Cost	Status	Ass...	Departm Code
→ 10000	Fabrikam, Inc.	Item	1029	Note Books	CA	PCS	30.00	2.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
10000	Fabrikam, Inc.	Item	1030	Diaries	CA	PCS	30.00	10.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
10000	Fabrikam, Inc.	Item	1027	Cleaning Services	CA	DAY	20.00	50.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
10000	Fabrikam, Inc.	Item	1028	Internet Subscription	CA	MON	1.00	100.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
10000	Fabrikam, Inc.	G/L Account	72130	Entertainment of personnel	CA		2.00	500.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
10000	Fabrikam, Inc.	Fixed Asset	FA000020	Delivery Truck	CA		1.00	20,000.00	0.00	0.00	Open	<input type="checkbox"/>	ADM

Dynamics 365 Business Central

BID0002 - 10000 - 22005

Items

Vendor No. ↑	Vendor Name	Type	No.	Description	Location Code	Unit Of Measure	RFQ Quantity	RFQ Unit Cost	Quantity	Unit Cost	Status	Ass...	Departm Code
→ 10000	Fabrikam, Inc.	Item	1029	Note Books	CA	PCS	30.00	2.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
10000	Fabrikam, Inc.	Item	1030	Diaries	CA	PCS	30.00	10.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
10000	Fabrikam, Inc.	Item	1027	Cleaning Services	CA	DAY	20.00	50.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
10000	Fabrikam, Inc.	Item	1028	Internet Subscription	CA	MON	1.00	100.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
10000	Fabrikam, Inc.	G/L Account	72130	Entertainment of personnel	CA		2.00	500.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
10000	Fabrikam, Inc.	Fixed Asset	FA000020	Delivery Truck	CA		1.00	20,000.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
20000	First Up Consultants	Item	1029	Note Books	CA	PCS	30.00	2.00	30.00	2.50	Open	<input type="checkbox"/>	ADM
20000	First Up Consultants	Item	1030	Diaries	CA	PCS	30.00	10.00	30.00	9.50	Open	<input type="checkbox"/>	ADM
20000	First Up Consultants	Item	1027	Cleaning Services	CA	DAY	20.00	50.00	20.00	0.00	Open	<input type="checkbox"/>	ADM
20000	First Up Consultants	Item	1028	Internet Subscription	CA	MON	1.00	100.00	1.00	50.00	Open	<input type="checkbox"/>	ADM
20000	First Up Consultants	G/L Account	72130	Entertainment of personnel	CA		2.00	500.00	2.00	0.00	Open	<input type="checkbox"/>	ADM
20000	First Up Consultants	Fixed Asset	FA000020	Delivery Truck	CA		1.00	20,000.00	1.00	0.00	Open	<input type="checkbox"/>	ADM
30000	Graphic Design Institute	Item	1029	Note Books	CA	PCS	30.00	2.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
30000	Graphic Design Institute	Item	1030	Diaries	CA	PCS	30.00	10.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
30000	Graphic Design Institute	Item	1027	Cleaning Services	CA	DAY	20.00	50.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
30000	Graphic Design Institute	Item	1028	Internet Subscription	CA	MON	1.00	100.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
30000	Graphic Design Institute	G/L Account	72130	Entertainment of personnel	CA		2.00	500.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
30000	Graphic Design Institute	Fixed Asset	FA000020	Delivery Truck	CA		1.00	20,000.00	0.00	0.00	Open	<input type="checkbox"/>	ADM

Lines ready for processing are submitted. Only submitted lines are considered for Awarding.

Dynamics 365 Business Central

Bid Analysis

BID0002 · 2026 Requisitions

Home Prepare Print/Send Request Approval Bid Navigate More options

Upload RFQ Lines Bid Analysis Worksheet Create Purchase Order

General

Vendors

Items Manage Submit Fewer options

Vendor No. ↑	Vendor Name	Type	No.	Description	Location Code	Unit Of Measure	RFQ Quantity	RFQ Unit Cost	Quantity	Unit Cost	Status	Ass...	Departm Code
<input type="radio"/> 10000	Fabrikam, Inc.	G/L Account	72130	Entertainment of personnel	CA		2.00	500.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
<input type="radio"/> 10000	Fabrikam, Inc.	Fixed Asset	FA000020	Delivery Truck	CA		1.00	20,000.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
<input checked="" type="radio"/> 20000	First Up Consultants	Item	1029	Note Books	CA	PCS	30.00	2.00	30.00	2.50	Open	<input type="checkbox"/>	ADM
<input checked="" type="radio"/> 20000	First Up Consultants	Item	1030	Diaries	CA	PCS	30.00	10.00	30.00	9.50	Open	<input type="checkbox"/>	ADM
<input type="radio"/> 20000	First Up Consultants	Item	1027	Cleaning Services	CA	DAY	20.00	50.00	20.00	0.00	Open	<input type="checkbox"/>	ADM
→ <input checked="" type="radio"/> 20000	First Up Consultants	Item	1028	Internet Subscription	CA	MON	1.00	100.00	1.00	50.00	Open	<input type="checkbox"/>	ADM
<input type="radio"/> 20000	First Up Consultants	G/L Account	72130	Entertainment of personnel	CA		2.00	500.00	2.00	0.00	Open	<input type="checkbox"/>	ADM
<input type="radio"/> 20000	First Up Consultants	Fixed Asset	FA000020	Delivery Truck	CA		1.00	20,000.00	1.00	0.00	Open	<input type="checkbox"/>	ADM
<input type="radio"/> 30000	Graphic Design Institute	Item	1029	Note Books	CA	PCS	30.00	2.00	0.00	0.00	Open	<input type="checkbox"/>	ADM
<input type="radio"/> 30000	Graphic Design Institute	Item	1030	Diaries	CA	PCS	30.00	10.00	0.00	0.00	Open	<input type="checkbox"/>	ADM

Dynamics 365 Business Central

Bid Analysis

BID0002 · 2026 Requisitions

Home Prepare Print/Send Request Approval Bid Navigate More options

Upload RFQ Lines Bid Analysis Worksheet Create Purchase Order

General

Vendors

Items Manage Reopen Fewer options

Vendor No.	Vendor Name	Type	No.	Description	Location Code	Unit Of Measure	RFQ Quantity	RFQ Unit Cost	Quantity	Unit Cost	Status	Assign
10000	Fabrikam, Inc.	G/L Account	72130	Entertainment of personnel	CA		2.00	500.00	0.00	0.00	Open	<input type="checkbox"/>
10000	Fabrikam, Inc.	Fixed Asset	FA000020	Delivery Truck	CA		1.00	20,000.00	0.00	0.00	Open	<input type="checkbox"/>
20000	First Up Consultants	Item	1029	Note Books	CA	PCS	30.00	2.00	30.00	2.50	Submitted	<input type="checkbox"/>
20000	First Up Consultants	Item	1030	Diaries	CA	PCS	30.00	10.00	30.00	9.50	Submitted	<input type="checkbox"/>
20000	First Up Consultants	Item	1027	Cleaning Services	CA	DAY	20.00	50.00	20.00	0.00	Open	<input type="checkbox"/>
20000	First Up Consultants	Item	1028	Internet Subscription	CA	MON	1.00	100.00	1.00	50.00	Submitted	<input type="checkbox"/>
20000	First Up Consultants	G/L Account	72130	Entertainment of personnel	CA		2.00	500.00	2.00	0.00	Open	<input type="checkbox"/>
20000	First Up Consultants	Fixed Asset	FA000020	Delivery Truck	CA		1.00	20,000.00	1.00	0.00	Open	<input type="checkbox"/>
30000	Graphic Design Institute	Item	1029	Note Books	CA	PCS	30.00	2.00	0.00	0.00	Open	<input type="checkbox"/>
30000	Graphic Design Institute	Item	1030	Diaries	CA	PCS	30.00	10.00	0.00	0.00	Open	<input type="checkbox"/>

Awarded lines are listed in the Assignment Tab:

Dynamics 365 Business Central

Bid Analysis

BID0002 · 2026 Requisitions

Home Prepare Print/Send Request Approval Bid Navigate More options

Approval Comments Send Approval Request Cancel Approval Request Approvals

General

Vendors

Items Assignment Manage

No.	Description	Selected Vendor	Vendor Name	Reason for Selection of Vendor	Purchase Order Created	Purchase Order No.
1027	Bid Analysis Assignment	10000	Fabrikam, Inc.		<input type="checkbox"/>	
1028	Bid Analysis Assignment	20000	First Up Consultants		<input type="checkbox"/>	
1029	Bid Analysis Assignment	20000	First Up Consultants		<input type="checkbox"/>	
1030	Bid Analysis Assignment	20000	First Up Consultants		<input type="checkbox"/>	
72130	Bid Analysis Assignment	10000	Fabrikam, Inc.		<input type="checkbox"/>	
FA000020	Bid Analysis Assignment	30000	Graphic Design Institute		<input type="checkbox"/>	

Purchase Orders are created for awarded lines after the Bid document is released (manual release or through approval).

Dynamics 365 Business Central

Bid Analysis

BID0002 · 2026 Requisitions

Home Prepare Print/Send Request Approval Bid Navigate More options

Upload RFQ Lines Bid Analysis Worksheet Create Purchase Order

General

Vendors

Items Assignment Manage

No.	Description	Selected Vendor	Vendor Name	Reason for Selection of Vendor	Purchase Order Created	Purchase Order No.
1027	Bid Analysis Assignment	10000	Fabrikam, Inc.		<input type="checkbox"/>	
1028	Bid Analysis Assignment	20000	First Up Consultants		<input type="checkbox"/>	
1029	Bid Analysis Assignment	20000	First Up Consultants		<input type="checkbox"/>	
1030	Bid Analysis Assignment	20000	First Up Consultants		<input type="checkbox"/>	
72130	Bid Analysis Assignment	10000	Fabrikam, Inc.		<input type="checkbox"/>	
FA000020	Bid Analysis Assignment	30000	Graphic Design Institute		<input type="checkbox"/>	

Dynamics 365 Business Central

Instrument SandboxesCS

?

BD

←

Bid Analysis

→

BID0002 · 2026 Requisitions

Home Prepare Print/Send Request Approval Bid Navigate More options

Upload RFQ Lines Bid Analysis Worksheet Create Purchase Order

General >

Vendors >

Items >

Assignment Manage

No. 1

Description

Selected Vendor

Vendor Name

Reason for Selection of Vendor

Purchase Order Created

Purchase Order No.

→ 1027

Bid Analysis Assignment

10000

Fabrikam, Inc.

☐ 106063

1028

Bid Analysis Assignment

20000

First Up Consultants

☐ 106064

1029

Bid Analysis Assignment

20000

First Up Consultants

☐ 106064

1030

Bid Analysis Assignment

20000

First Up Consultants

☐ 106064

72130

Bid Analysis Assignment

10000

Fabrikam, Inc.

☐ 106063

FA000020

Bid Analysis Assignment

30000

Graphic Design Institute

☐ 106065

Dynamics 365 Business Central

Instrument SandboxesCS

?

BD

←

Bid Analysis

→

BID0002 · 2026 Requisitions

Home Prepare Print/Send Request Approval Bid Navigate Automate Fewer options

Request for Quotation Purchase Orders Vendor Evaluations

General >

Vendors >

Items >

Assignment Manage

No. 1

Description

Selected Vendor

Vendor Name

Reason for Selection of Vendor

Purchase Order Created

Purchase Order No.

→ 1027

Bid Analysis Assignment

10000

Fabrikam, Inc.

☐ 106063

1028

Bid Analysis Assignment

20000

First Up Consultants

☐ 106064

1029

Bid Analysis Assignment

20000

First Up Consultants

☐ 106064

1030

Bid Analysis Assignment

20000

First Up Consultants

☐ 106064

72130

Bid Analysis Assignment

10000

Fabrikam, Inc.

☐ 106063

FA000020

Bid Analysis Assignment

30000

Graphic Design Institute

☐ 106065

Dynamics 365 Business Central

Instrument SandboxesCS

?

BD

←

Bid Analysis

→

BID0002 · 2026 Requisitions

Home Prepare Print/Send Request Approval Bid Navigate Automate Fewer options

Request for Quotation Purchase Orders Vendor Evaluations

General >

Vendors >

Items >

Purchase Orders

Purchase Orders: All

+ New Manage Process Release Posting Print/Send

No. 1

Buy-from Vendor No.

Buy-from Vendor Name

Vendor Authorizati... No.

Location Code

Construction Project Code

Purchaser Code

Department Code

Customer/ergo... Code

Doc Date

106063

10000

Fabrikam, Inc.

ADM

MEDIUM

12/

106064

20000

First Up Consultants

ADM

MEDIUM

12/

106065

30000

Graphic Design Insti...

ADM

MEDIUM

12/

Map E-Document Lines

Vendor Evaluations are also created in the process of creating purchase orders.

Dynamics 365 Business Central

Bid Analysis

BID0002 · 2026 Requisitions

Home Prepare Print/Send Request Approval Bid **Navigate** Automate Fewer options

Request for Quotation Purchase Orders **Vendor Evaluations**

General

Vendors

Items

Assignment Manage

No. 1	Description	Selected Vendor	Vendor Name	Reason for Selection of Vendor	Purchase Order Created	Purchase Order No.
→ 1027	Bid Analysis Assignment	10000	Fabrikam, Inc.		<input checked="" type="checkbox"/>	106063
1028	Bid Analysis Assignment	20000	First Up Consultants		<input checked="" type="checkbox"/>	106064
1029	Bid Analysis Assignment	20000	First Up Consultants		<input checked="" type="checkbox"/>	106064
1030	Bid Analysis Assignment	20000	First Up Consultants		<input checked="" type="checkbox"/>	106064
72130	Bid Analysis Assignment	10000	Fabrikam, Inc.		<input checked="" type="checkbox"/>	106063
FA000020	Bid Analysis Assignment	30000	Graphic Design Institute		<input checked="" type="checkbox"/>	106065

Dynamics 365 Business Central

Bid Analysis

BID0002 · 2026 Requisitions

Home Prepare Print/Send Request Approval Bid Navigate Automate Fewer options

Request for Quotation Purchase Orders Vendor Evaluations

Vendor Evaluations

RFQ No. 1 PO No. 1 Vendor No. 1 Description

RFQ00002	106063	10000	Vendor Evaluation for PO 106063
RFQ00002	106064	20000	Vendor Evaluation for PO 106064
RFQ00002	106065	30000	Vendor Evaluation for PO 106065

4. Purchase Orders

A standard Business Central Purchase Order is created and Procure-to-Pay related fields updated as below:

Dynamics 365 Business Central

Purchase Order
106063 · Fabrikam, Inc.

Process Posting Release Prepare Print/Send Request Approval Order Acumens eMailing Acumens Procure to Pay More options

✓ Saved Map E-Document Lines

Fabrikam, Inc. 12/18/2025 Open

*** General >**

Acumens Procure to Pay

Purchase Req. No. PREQ0004 Bid No. BID0002

RFQ No. RFQ0002

Shipping and Payment >

Lines Manage Line Functions Order Show Lines with Issues Fewer options

Type	No.	Item Reference No.	Description	Remarks	Location Code	Bin Code	Quantity	Reserved Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Tax Gr
→ Item	1027		Cleaning Services		CA		20		DAY	48.00		*
G/L Account	72130		Entertainment of personnel		CA		2			500.00		NON

Subtotal Excl. Tax (USD) 1,960.00 Total Excl. Tax (USD) 1,960.00

Inv. Discount Amount (USD) 0.00 Total Tax (USD) 0.00

Invoice Discount % 0 Total Incl. Tax (USD) 1,960.00

Standard Business Central Purchase process takes over after the order is created.

5. Vendor Evaluation

A vendor Evaluation Entry is created for each Purchase Order created from a Bid:

The screenshot displays the 'Vendor Evaluation' form for PO 106063. The 'General' tab is active, showing fields for RFQ No. (RFQ0002), PO No. (106063), Vendor No. (10000), Vendor Name (Fabrikam, Inc.), Description (Vendor Evaluation for PO 106063), and Average Rate (0). Below the form is a table with columns: No., Description, RFQ Unit Cost, PO Unit Cost, Invoiced Unit Cost, RFQ Quantity, PO Quantity, Received Quantity, Invoiced Quantity, Returned Quantity, Expected Receipt Date, Actual Receipt Date, and Comments. The table contains two rows: 1027 (Cleaning Services) and 72130 (Entertainment of personnel).

No.	Description	RFQ Unit Cost	PO Unit Cost	Invoiced Unit Cost	RFQ Quantity	PO Quantity	Received Quantity	Invoiced Quantity	Returned Quantity	Expected Receipt Date	Actual Receipt Date	Comments
1027	Cleaning Services	50.00	48.00	0.00	20	20	0	0	0	12/19/2025		
72130	Entertainment of personnel	500.00	500.00	0.00	2	2	0	0	0	12/18/2025		

Related Purchase Order:

The screenshot displays the 'Purchase Order' form for PO 106063, Vendor: Fabrikam, Inc. The 'General' tab is active, showing fields for Process, Posting, Release, Prepare, Print/Send, Request Approval, Order, Acumens eMailing, Acumens Procure to Pay, and More options. Below the form is a table with columns: Type, No., Item Reference No., Description, Remarks, Location Code, Bin Code, Quantity, Reserved Quantity, Unit of Measure Code, Direct Unit Cost Excl. Tax, Tax Area Code, and Tax Gr. The table contains two rows: 1027 (Cleaning Services) and 72130 (Entertainment of personnel). Below the table is a summary section with fields for Subtotal Excl. Tax (USD), Inv. Discount Amount (USD), Invoice Discount %, Total Excl. Tax (USD), Total Tax (USD), and Total Incl. Tax (USD).

Type	No.	Item Reference No.	Description	Remarks	Location Code	Bin Code	Quantity	Reserved Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Tax Gr.
Item	1027		Cleaning Services		CA		20		DAY	48.00		*
G/L Account	72130		Entertainment of personnel		CA		2			500.00		NCH

Subtotal Excl. Tax (USD) 1,960.00 Total Excl. Tax (USD) 1,960.00
Inv. Discount Amount (USD) 0.00 Total Tax (USD) 0.00
Invoice Discount % 0 Total Incl. Tax (USD) 1,960.00

On Receipt of a Purchase Line Item, the Vendor Evaluation Line Receipt Quantity, Actual Receipt Date and Purchase Receipt No is updated.

The screenshot displays the 'Vendor Evaluation' form for PO 106063, Vendor: Fabrikam, Inc. The 'General' tab is active, showing fields for RFQ No. (RFQ0002), PO No. (106063), Vendor No. (10000), Vendor Name (Fabrikam, Inc.), Description (Vendor Evaluation for PO 106063), and Average Rate (0). Below the form is a table with columns: No., Description, RFQ Unit Cost, PO Unit Cost, Invoiced Unit Cost, RFQ Quantity, PO Quantity, Received Quantity, Invoiced Quantity, Returned Quantity, Expected Receipt Date, Actual Receipt Date, and Comments. The table contains two rows: 1027 (Cleaning Services) and 72130 (Entertainment of personnel). The 'Received Quantity' for line 1027 is updated to 10, and the 'Actual Receipt Date' for line 72130 is updated to 12/22/2025.

No.	Description	RFQ Unit Cost	PO Unit Cost	Invoiced Unit Cost	RFQ Quantity	PO Quantity	Received Quantity	Invoiced Quantity	Returned Quantity	Expected Receipt Date	Actual Receipt Date	Comments
1027	Cleaning Services	50.00	48.00	0.00	20	20	10	0	0	12/19/2025	12/22/2025	
72130	Entertainment of personnel	500.00	500.00	0.00	2	2	2	0	0	12/18/2025	12/22/2025	

For the remaining quantity, on partial receipt, a new line is created on Vendor Evaluation Line once it's received:

Dynamics 365 Business Central

Vendor Evaluation

10000 · Vendor Evaluation for PO 106063

General

RFQ No. RFQ0002 Vendor Name Fabrikam, Inc.

PO No. 106063 Description Vendor Evaluation for PO 106063

Vendor No. 10000 Average Rate 0

No.	Description	RFQ Unit Cost	PO Unit Cost	Invoiced Unit Cost	RFQ Quantity	PO Quantity	Received Quantity	Invoiced Quantity	Returned Quantity	Expected Receipt Date	Actual Receipt Date	Comments
→ 1027	Cleaning Services	50.00	48.00	0.00	20	20	10	0	0	12/19/2025	12/22/2025	
1027	Cleaning Services	50.00	48.00	0.00	20	20	10	0	0	12/19/2025	12/31/2025	
72130	Entertainment of personnel	500.00	500.00	0.00	2	2	2	0	0	12/18/2025	12/22/2025	

On Invoice the Purchase Order, Invoiced Cost and Invoiced Quantity is updated. Also Posted Purchase Invoice No is updated.

Dynamics 365 Business Central

Vendor Evaluation

10000 · Vendor Evaluation for PO 106063

General

RFQ No. RFQ0002 Vendor Name Fabrikam, Inc.

PO No. 106063 Description Vendor Evaluation for PO 106063

Vendor No. 10000 Average Rate 0

No.	Description	RFQ Unit Cost	PO Unit Cost	Invoiced Unit Cost	RFQ Quantity	PO Quantity	Received Quantity	Invoiced Quantity	Returned Quantity	Expected Receipt Date	Actual Receipt Date	Comments
→ 1027	Cleaning Services	50.00	48.00	48.00	20	20	10	10	0	12/19/2025	12/22/2025	
72130	Entertainment of personnel	500.00	500.00	500.00	2	2	2	2	0	12/18/2025	12/22/2025	
1027	Cleaning Services	50.00	48.00	48.00	20	20	10	10	0	12/19/2025	12/31/2025	

Each vendor evaluation line item is rated using defined metrics. Some Metrics are auto calculated, e.g. Cost rating, others are user defined like Quality:

Open Rate Card from the Rate field (drilldown field)

Dynamics 365 Business Central

Vendor Evaluation

10000 · Vendor Evaluation for PO 106063

General

RFQ No. RFQ0002 Vendor Name Fabrikam, Inc.

PO No. 106063 Description Vendor Evaluation for PO 106063

Vendor No. 10000 Average Rate 0

No.	PO Unit Cost	Invoiced Unit Cost	RFQ Quantity	PO Quantity	Received Quantity	Invoiced Quantity	Returned Quantity	Expected Receipt Date	Actual Receipt Date	Comments	Performance Code	Rate	Posted Purch. Inv. No.	P
→ 1027	48.00	48.00	20	20	10	10	0	12/19/2025	12/22/2025			0	108248	P
72130	500.00	500.00	2	2	2	2	0	12/18/2025	12/22/2025			0	108248	R
1027	48.00	48.00	20	20	10	10	0	12/19/2025	12/31/2025			0	108248	

Rating - RAT0006 · Cleaning Services



Manage Page

General

code RAT0006 Rate 7.00

Description Cleaning Services

Lines Manage



	Metric ↑		Value	Rate
	CST		Cost Advantage	10
	DEFR		Conforming	10
	DELR		Delayed	0
	FR		Partial Fill	5
→	QR	:	Premium	10

The Rate on the Header is the average performance of the line item:

Rating - RAT0006 · Cleaning Services



Manage Page

General

code RAT0006 Rate 7.00

Description Cleaning Services

Lines Manage



	Metric ↑		Value	Rate
	CST		Cost Advantage	10
	DEFR		Conforming	10
	DELR		Delayed	0
	FR		Partial Fill	5
→	QR	:	Premium	10

Based on each line performance, we have a performance rate for the Purchase Order on the Vendor Evaluation:

Dynamics 365 Business Central

Vendor Evaluation
10000 · Vendor Evaluation for PO 106063

General

RFQ No. RFQ0002 Vendor Name Fabrikam, Inc.
PO No. 106063 Description Vendor Evaluation for PO 106063
Vendor No. 10000 Average Rate 6.66667

Lines Manage

No.	PO Unit Cost	Invoiced Unit Cost	RFQ Quantity	PO Quantity	Received Quantity	Invoiced Quantity	Returned Quantity	Expected Receipt Date	Actual Receipt Date	Comments	Performance Code	Rate	Posted Purch. Inv. No.	P
→ 1027	48.00	48.00	20	20	10	10	0	12/19/2025	12/22/2025			7	108248	
1027	48.00	48.00	20	20	10	10	0	12/19/2025	12/31/2025			6	108248	1
72130	500.00	500.00	2	2	2	2	0	12/18/2025	12/22/2025			7	108248	

When a line item is returned, Vendor Evaluation line Returned Quantity is updated

Dynamics 365 Business Central

Vendor Evaluation
10000 · Vendor Evaluation for PO 106063

General

RFQ No. RFQ0002 Vendor Name Fabrikam, Inc.
PO No. 106063 Description Vendor Evaluation for PO 106063
Vendor No. 10000 Average Rate 6.66667

Lines Manage

No.	Description	RFQ Unit Cost	PO Unit Cost	Invoiced Unit Cost	RFQ Quantity	PO Quantity	Received Quantity	Invoiced Quantity	Returned Quantity	Expected Receipt Date	Actual Receipt Date	Comments
→ 1027	Cleaning Services	50.00	48.00	48.00	20	20	10	10	3	12/19/2025	12/22/2025	
1027	Cleaning Services	50.00	48.00	48.00	20	20	10	10	0	12/19/2025	12/31/2025	
72130	Entertainment of personnel	500.00	500.00	500.00	2	2	2	2	0	12/18/2025	12/22/2025	

Old Line Rating:

Dynamics 365 Business Central

Vendor Evaluation
10000 · Vendor Evaluation for PO 106063

General

RFQ No. RFQ0002 Vendor Name Fabrikam, Inc.
PO No. 106063 Description Vendor Evaluation for PO 106063
Vendor No. 10000 Average Rate 6.66667

Lines Manage

No.	PO Unit Cost	Invoiced Unit Cost	RFQ Quantity	PO Quantity	Received Quantity	Invoiced Quantity	Returned Quantity	Expected Receipt Date	Actual Receipt Date	Comments	Performance Code	Rate	Posted Purch. Inv. No.	P
→ 1027	48.00	48.00	20	20	10	10	0	12/19/2025	12/22/2025			7	108248	
1027	48.00	48.00	20	20	10	10	0	12/19/2025	12/31/2025			6	108248	1
72130	500.00	500.00	2	2	2	2	0	12/18/2025	12/22/2025			7	108248	

New Rating for the line and Purchase Order:

Rating - RAT0006 · Cleaning Services

Manage Page

General

code RAT0006 Rate 6.40

Description Cleaning Services

Lines Manage

Metric ↑	Value	Rate
→ CST	Cost Advantage	10
DEFR	Non-conforming	3
DELR	Delayed	0
FR	Partial Fill	5
QR	Premium	10

Dynamics 365 Business Central Environment: Sandbox/CCU

Vendor Evaluation

10000 · Vendor Evaluation for PO 106063

General

RFQ No. RFQ0002 Vendor Name Fabrikam, Inc.

PO No. 106063 Description Vendor Evaluation for PO 106063

Vendor No. 10000 Average Rate 6.45667

Lines Manage

No.	PO Unit Cost	Involved Unit Cost	RFQ Quantity	PO Quantity	Received Quantity	Involved Quantity	Returned Quantity	Expected Receipt Date	Actual Receipt Date	Comments	Performance Code	Rate	Posted Patch, Inc. No.	P	P	R
→ 1027	48.00	48.00	20	20	10	10	3	12/19/2025	12/22/2025			6.4	108248			
1027	48.00	48.00	20	20	10	10	0	12/19/2025	12/31/2025			6	108248			1
72130	500.00	500.00	2	2	2	2	0	12/18/2025	12/22/2025			7	108248			

6. RFQ Mandatory

This is setup done on Vendor or Item level to make RFQ Document No for purchases related to Vendor or Item.

RFQ Mandatory on vendor ensures that all Purchase Orders related to the Vendor have an RFQ Document related to it before posting:

Dynamics 365 Business Central Vendor Card for 10000 - Fabrikam, Inc. The 'Acumens Procure to Pay' section shows the 'RFQ Mandatory' toggle switch turned on.

Dynamics 365 Business Central Purchase Order 106054 - Fabrikam, Inc. The 'Acumens Procure to Pay' section shows the 'RFQ No.' field highlighted with a red box.

Dynamics 365 Business Central Error Messages. The error message states: "RFQ No. must have a value in Purchase Header: Document Type=Order, No.=106054. It cannot be zero or empty."

When Item is set to RFQ Mandatory, RFQ is required for the specific line item before posting.

Dynamics 365 Business Central

Acumens Procure To Pay

Item Card

1029 · Note Books

Process Request Approval Item Prices & Discounts Rental Acumens Flexible Commissions R2 Acumens StarterPack More options

Item

No. 1029 Type Inventory

Description Note Books Base Unit of Measure PCS

Description 2 Item Category Code

Blocked Variant Mandatory if Exists Default (No)

Restaurant Information >

Acumens Procure to Pay

RFQ Mandatory ☒

Dynamics 365 Business Central

Purchase Order

106066 · Fabrikam, Inc.

Process Posting Release Prepare Print/Send Request Approval Order Acumens eMailing Acumens Procure to Pay More options

Create Wise Receipt Create Inventory Put-away/Pick... Send Intercompany Purchase Order Archive Document Map E-Document Lines

General > Fabrikam, Inc. 12/31/2025 Open

Acumens Procure to Pay >

Shipping and Payment >

Lines Manage Line Functions Order Show Lines with Issues Fewer options

Type	RFQ No.	No.	Item Reference No.	Description	Remarks	Location Code	Bin Code	Quantity	Revised Quantity	Unit of Measure Code	Direct Unit Cost	Exc. Tax	Tax Area
Item		1029		Note Books				1	-	PCS	3.00		ATLANT
Item		1030		Diaries				1	-	PCS	10.00		ATLANT

Subtotal Excl. Tax (USD) 13.00 Total Excl. Tax (USD) 13.00

Inv. Discount Amount (USD) 0.00 Total Tax (USD) 0.65

Invoice Discount % 0 Total Incl. Tax (USD) 13.65

Dynamics 365 Business Central

Error Messages

Process Open related record

Record ID	Context Record ID	Description	Recommend
Purchase H.		RFQ No. must have a value in Purchase Line: Document Type=Order, Document No.=106066, Line No.=10000. It cannot be zero or empty.	-

Details

Context Purchase Header: Order, 106066

Record Field Name

Error Location

7. Storage Requisition:

This is an internal document used to disburse Items to the Employees after they have been purchased.

Dynamics 365 Business Central

Enrollment Sandbook/CS

Acumen

Storage Requisition

SREQ0003 · Admin Department Notebooks and Diaries

Home

Print

Request Approval

Requisition

More options

Post

Release

General

No.

SREQ0003

Amount

72.50

Document Date

12/22/2025

Description

Admin Department Notebooks and Diaries

Posting Date

12/22/2025

Department Code

ADM

Required Date

12/22/2025

Customergroup Code

MEDIUM

Employee No.

E0010

Status

Open

Employee Name

John Doe

User ID

DEVELOPER

Requester ID

DEVELOPER

Lines

Manage

Item No.	Description	Location Code	Inventory	Quantity	Unit of Measure Code	Unit Cost	Line Amount	Quantity to Issue	Quantity Iss.
1029	Note Books	CA	30.00	10.00	PCS	2.50	25.00	10.00	0
1030	Diaries	CA	30.00	5.00	PCS	9.50	47.50	5.00	0

To post disbursement, the document must be released. This can be released manually or through approvals

Dynamics 365 Business Central

Enrollment Sandbook/CS

Acumen

Storage Requisition

SREQ0003 · Admin Department Notebooks and Diaries

Home

Print

Request Approval

Requisition

More options

Post

Reopen

General

No.

SREQ0003

Amount

72.50

Document Date

12/22/2025

Description

Admin Department Notebooks and Diaries

Posting Date

12/22/2025

Department Code

ADM

Required Date

12/22/2025

Customergroup Code

MEDIUM

Employee No.

E0010

Status

Released

Employee Name

John Doe

User ID

DEVELOPER

Requester ID

DEVELOPER

Lines

Manage

Item No.	Description	Location Code	Inventory	Quantity	Unit of Measure Code	Unit Cost	Line Amount	Quantity to Issue	Quantity Iss.
1029	Note Books	CA	30.00	10.00	PCS	2.50	25.00	10.00	0
1030	Diaries	CA	30.00	5.00	PCS	9.50	47.50	5.00	0

Posting Storage Requisition posts an item journal negative adjustment for disbursed Items using the Template and Batch defined on Procure-to-Pay Setup:

Dynamics 365 Business Central

Storage Requisition

SREQ0003 · Admin Department Notebooks and Diaries

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Post | Reopen

General

No.	SREQ0003	Amount	72.50
Document Date	12/22/2025	Description	Admin Department Notebooks and Diaries
Posting Date	12/22/2025	Department Code	ADM
Required Date	12/22/2025	Customergroup Code	MEDIUM
Employee No.	10010	Status	Released
Employee Name	John Doe	User ID	DEVELOPER
Requester ID	DEVELOPER		

Lines | Manage

Item No.	Description	Location Code	Inventory	Quantity	Unit of Measure Code	Unit Cost	Line Amount	Quantity to Issue	Quantity Iss.
10029	Note Books	CA	30.00	10.00	PCS	2.50	25.00	10.00	0
1030	Diaries	CA	30.00	5.00	PCS	9.50	47.50	5.00	0

Posted Entries:

Dynamics 365 Business Central

Item Ledger Entries

Process | Entry | More options

Posting Date	Entry Type	Document Type	Document No.	Item No.	Location Code	Quantity	Invoiced Quantity	Cost Amount (Actual)	Department Code	Description	Customergroup Code	Remaining Quantity	Se
12/22/2025	Negative Adjmt.		SREQ0003	10029	CA	-10	-10	-25.00	ADM	Admin Department Notebooks...	MEDIUM	0	
12/22/2025	Purchase	Purchase Receipt	107265	1029	CA	30	30	75.00	ADM		MEDIUM	20	

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Item Ledger Entries

Process | Entry | More options

Posting Date	Entry Type	Document Type	Document No.	Item No.	Location Code	Quantity	Invoiced Quantity	Cost Amount (Actual)	Department Code	Description	Customergroup Code	Remaining Quantity	Se
12/22/2025	Negative Adjmt.		SREQ0003	1030	CA	-5	-5	-47.50	ADM	Admin Department Notebooks...	MEDIUM	0	
12/22/2025	Purchase	Purchase Receipt	107265	1030	CA	30	30	285.00	ADM		MEDIUM	25	