

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

Table of Contents

ACUMENS PROCURE-TO-PAY	4
1. Purchase Requisitions	5
2. Request for Quotations.....	7
3. Bid Analysis.....	11
4. Purchase Orders.....	17
5. Vendor Evaluation	18
6. RFQ Mandatory	23
7. Storage Requisition:	25

ACUMENS PROCUREMENT-TO-PAY

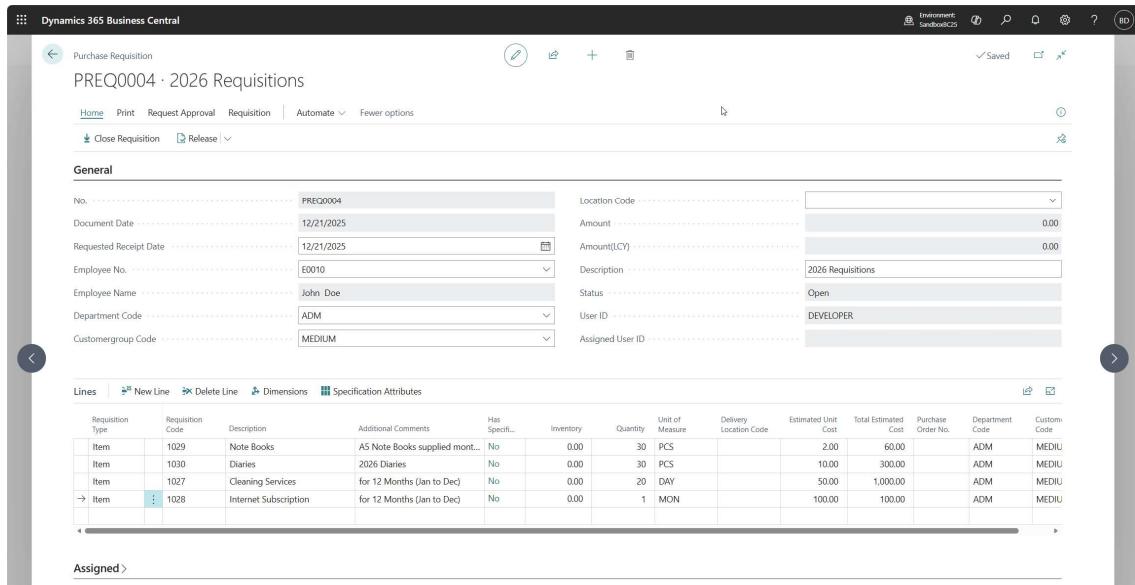
Acumens Procure-to-Pay app extends standard Business Central Purchasing process by introducing internal Requisition documents, Request for Quotations, Bid Management and Vendor Performance Evaluations.

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

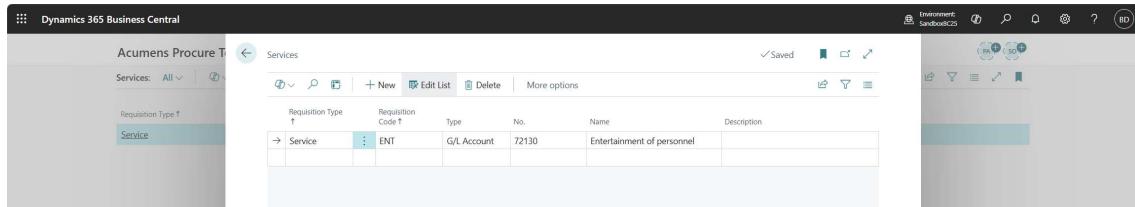
This is an internal request document used by company employees to request the purchasing department to buy good or services.



The screenshot shows the 'Purchase Requisition' screen in Dynamics 365 Business Central. The top navigation bar includes 'Home', 'Print', 'Request Approval', 'Requisition', 'Automate', 'Fewer options', and 'More options'. The main area displays 'PREQ0004 - 2026 Requisitions'. The 'General' section contains fields for 'No.' (PREQ0004), 'Document Date' (12/1/2023), 'Requested Receipt Date' (12/21/2023), 'Employee No.' (E0010), 'Employee Name' (John Doe), 'Department Code' (ADM), 'Customergroup Code' (MEDIUM), 'Location Code', 'Amount' (0.00), 'Amount(LCY)' (0.00), 'Description' (2026 Requisitions), 'Status' (Open), 'User ID' (DEVELOPER), and 'Assigned User ID'. Below this is a table titled 'Lines' with columns: 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, and Custom Code. The table contains four items: Note Books, Diaries, Cleaning Services, and Internet Subscription.

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

Services:



The screenshot shows the 'Services' screen in Dynamics 365 Business Central. The top navigation bar includes 'Home', 'Print', 'Request Approval', 'Requisition', 'Automate', 'Fewer options', and 'More options'. The main area displays 'Acumens Procure T'. The 'Services' section shows a list of services with columns: Requisition Type, Requisition Code, Type, No., Name, and Description. One service is listed: Service (Requisition Type), ENT (Requisition Code), G/L Account (Type), 72130 (No.), Entertainment of personnel (Name), and Entertainment of personnel (Description).

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

Purchase Requisition

PREQ0004 - 2026 Requisitions

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.	E0010	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...
→ Item	1029	Note Books	A5 Note Books supplied mont...	No	0.00	30	PCS	CA	2.00	60.00	ADM	MEDIUM	
Item	1030	Dairies	2025 Dairies	No	0.00	30	PCS	CA	10.00	300.00	ADM	MEDIUM	
Item	1027	Cleaning Services	for 12 Months (Jan to Dec)	No	0.00	20	DAY	CA	50.00	1,000.00	ADM	MEDIUM	
Item	1028	Internet Subscription	for 12 Months (Jan to Dec)	No	0.00	1	MON	CA	100.00	100.00	ADM	MEDIUM	
Service	ENT	Entertainment of personnel	Team Building	No	0.00	2		CA	500.00	1,000.00	ADM	MEDIUM	
Fixed Asset	FA000020	Delivery Truck	YOM 2025	No	0.00	1		CA	20,000.00	20,000.00	ADM	MEDIUM	

2. Request for Quotations

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

Request for Quotation

RFQ0002 · 2026 Requisitions

General

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

RFQ is created for Approved Purchase Requisitions:

Request for Quotation

RFQ0002 · 2026 Requisitions

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@sbcynamicserp.com
Closing Date	1/31/2026	cc: Email Addresses	betty@sbcynamicserp.com
Closing Date for Inquiry	1/15/2026	Additional Email Body	Mandatory Documents: Business Registration, Tax Registration Certificate
Submission Email Address	developer@sbcynamicserp.com	User ID	DEVELOPER
Submission Time	10:00:00 AM	RFQ Terms & Conditions	Yes
Point of Contact	Betty Too	RFQ Terms	Yes
Type	RFQ		

Submitted Requisition Lines

Document No. T	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	DAY	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

Acumen Request for Quotation

RFQ0002 · 2026 Requisitions

No. 1 RFQ0001 RFQ0002

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@sbcdynamicserp.com
Closing Date	1/31/2026	cc Email Addresses	betty@sbcdynamicserp.com
Closing Date for Inquiry	1/19/2026	Additional Email Body	Mandatory Documents: Business Registration Tax Registration Certificate
Submission Email Address	developer@sbcdynamicserp.com	User ID	DEVELOPER
Submission Time	10:00:00 AM	RFQ Terms & Conditions	RFQ Terms
Point of Contact	Betty Too		Yes
Type	RFQ		

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	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

Acumen Request for Quotation

RFQ0002 · 2026 Requisitions

No. 1 RFQ0001 RFQ0002

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	1/31/2026	cc Email Addresses	betty@sbcdynamicserp.com
Closing Date for Inquiry	1/19/2026	Additional Email Body	Mandatory Documents: Business Registration Tax Registration Certificate
Submission Email Address	developer@sbcdynamicserp.com	User ID	DEVELOPER
Submission Time	10:00:00 AM	RFQ Terms & Conditions	RFQ Terms
Point of Contact	Betty Too		Yes
Type	RFQ		

Lines

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

Document Code 1	Document Description	Mandatory
→		

Dynamics 365 Business Central

Acumen Request for Quotation

RFQ0002 · 2026 Requisitions

No. ↑ RFQ0001 RFQ0002

Home Prepare Print/Send Request Approval RFQ Automate Fewer options

Close Release

General

No. RFQ0002 Document Date 12/22/2025 Amount 0.00

RFQ Date 12/22/2025 Description 2026 Requisitions

Issue Date 12/31/2025 Status Open

RFQ Enquiries Email Address developer@sbcynamicserp.com

Closing Date

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

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

Acumen Request for Quotation

RFQ0002 · 2026 Requisitions

No. ↑ RFQ0001 RFQ0002 RFQ0003

Home Prepare Print/Send Request Approval RFQ Automate Fewer options

Get Requisition Lines RFQ Vendors

General

No. RFQ0002 Document Date 12/22/2025 Amount 22,460.00

RFQ Date 12/22/2025 Description 2026 Requisitions

Issue Date 12/31/2025 Status Closed

RFQ Enquiries Email Address developer@sbcynamicserp.com

c: Email Addresses betty@sbcynamicserp.com

Additional Email Body

Mandatory Documents: Business Registration, Tax Registration Certificate, Tax Compliance Certificate, Bank Statement

Point of Contact Betty Too

User ID DEVELOPER

RFQ Terms & Conditions

RFQ Terms Yes

Dynamics 365 Business Central

Acumen Request for Quotation

RFQ Vendors

No. ↑ RFQ0001 RFQ0002

Home Prepare Print/Send Request Approval RFQ Automate Fewer options

RFQ Vendors

General

Vendor No.	Vendor Name	Not listed Vendor	Vendor Email Address
10000	Fabrikam, Inc.		developer@sbcynamics.com
20000	First Up Consultants		betty@sbcynamicserp.com
→ 30000	Graphic Design Institute		bryce.jason@contoso.com

Sample Email:

Request for Quotation (RFQ0002) : 2026 Requisitions [Summarize](#)

Business Central Developer
To: [Betty Chebet Too](#)

Mon 12/22/2025 15:31

Request for Quotation (RFQ0002) 699 KB [First Up Consultants-RFQ0002 ...](#) 5 KB

2 attachments (705 KB) [Save all to OneDrive - sbcdynamicserp.com](#) [Save All Attachments](#)

Dear First Up Consultants,

Attached is an RFQ for your action. Kindly confirm availability and send us a quote by 01/31/26

Mandatory Documents: Business Registration Tax Registration Certificate Tax Compliance Certificate Bank Statement References

We expect to make reservation via Purchase Order.

Kind Regards

Acumens Procure To Pay

[Reply](#) [Forward](#)

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

BID0002 · 2026 Requisitions

General

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

Vendors

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

Vendor No.	Vendor Name	Type	No.	Description	Location Code	Unit Of Measure	RFQ Quantity	RFQ Unit Cost	Quantity	Unit Cost	Status	Awa...	Depar...
10000	Fabrikam, Inc.	Item	1029	Note Books	CA	PCS	30.00	2.00	0.00	0.00	Open	<input type="checkbox"/>	AC*
10000	Fabrikam, Inc.	Item	1030	Diaries	CA	PCS	30.00	10.00	0.00	0.00	Open	<input type="checkbox"/>	AC
10000	Fabrikam, Inc.	Item	1027	Cleaning Services	CA	DAY	20.00	50.00	0.00	0.00	Open	<input type="checkbox"/>	AC
10000	Fabrikam, Inc.	Item	1028	Internet Subscription	CA	MON	1.00	100.00	0.00	0.00	Open	<input type="checkbox"/>	AC
10000	Fabrikam, Inc.	G/L Account	72130	Entertainment of personnel	CA		2.00	500.00	0.00	0.00	Open	<input type="checkbox"/>	AC
10000	Fabrikam, Inc.	Fixed Asset	FA0000020	Delivery Truck	CA		1.00	20,000.00	0.00	0.00	Open	<input type="checkbox"/>	AC
20000	First Up Consultants	Item	1029	Note Books	CA	PCS	30.00	2.00	0.00	0.00	Open	<input type="checkbox"/>	AC
20000	First Up Consultants	Item	1030	Diaries	CA	PCS	30.00	10.00	0.00	0.00	Open	<input type="checkbox"/>	AC
20000	First Up Consultants	Item	1027	Cleaning Services	CA	DAY	20.00	50.00	0.00	0.00	Open	<input type="checkbox"/>	AC

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.

General

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

Vendors

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

Vendor No. †	Vendor Name	Type	No.	Description	Location Code	Unit Of Measure	RFQ Quantity	RFQ Unit Cost	Quantity	Unit Cost	Status	Awa...	Depar...
→ 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	FA0000020	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

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

Manual Update:

General

Vendors

Items

Vendor No. †	Vendor Name	Type	No.	Description	Location Code	Unit Of Measure	RFQ Quantity	RFQ Unit Cost	Quantity	Unit Cost	Status	Awa...	Depar...
→ 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	FA0000020	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:

Dynamics 365 Business Central

Environment: Sandbox 25 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 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...	Depart...
→ 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	FA0000020	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:

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

The screenshot shows two pages from Dynamics 365 Business Central:

- Bid Analysis Worksheet:** The top page displays a list of requisitions (BID0002 - 2026 Requisitions) with a "Bid Analysis Worksheet" button highlighted. The table lists items from various vendors like Fabrikam, Inc. and First Up Consultants, with columns for Vendor No., Vendor Name, Type, No., Description, Location Code, Unit Of Measure, RFQ Quantity, RFQ Unit Cost, Quantity, Unit Cost, Status, and Department Code.
- Items:** The bottom page shows a detailed list of items for vendor 10000 (Fabrikam, Inc.) with a "Submit" button highlighted. The table includes columns for Vendor No., Vendor Name, Type, No., Description, Location Code, Unit Of Measure, RFQ Quantity, RFQ Unit Cost, Quantity, Unit Cost, Status, and Department Code.

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

The screenshot shows the Bid Analysis Worksheet page with the "Submit" button highlighted. The table lists items from various vendors, with the "Submitted" status indicated by a green dot next to the vendor names. The table includes columns for Vendor No., Vendor Name, Type, No., Description, Location Code, Unit Of Measure, RFQ Quantity, RFQ Unit Cost, Quantity, Unit Cost, Status, and Department Code.

The screenshot shows the 'Bid Analysis' screen for 'BID0002 - 2026 Requisitions'. The 'Assignment' tab is selected. Two lines are highlighted with red boxes: 'First Up Consultants' (Item 1028) and 'Graphic Design Institute' (Item 1030), both marked as 'Submitted' in the 'Status' column. The table includes columns for No. (Vendor No. ↑), Description, Type, No., Description, Location Code, Unit Of Measure, RFQ Quantity, RFQ Unit Cost, Quantity, Unit Cost, Status, and Awarded.

Awarded lines are listed in the Assignment Tab:

The screenshot shows the 'Bid Analysis' screen for 'BID0002 - 2026 Requisitions'. The 'Assignment' tab is selected. The table includes columns for No. ↑, Description, Selected Vendor, Vendor Name, Reason for Selection of Vendor, Purchase Order Created, and Purchase Order No. The 'Purchase Order Created' column for the awarded lines (1028 and 1030) contains checkboxes that are checked.

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

The screenshot shows the 'Bid Analysis' screen for 'BID0002 - 2026 Requisitions'. The 'Assignment' tab is selected. The table includes columns for No. ↑, Description, Selected Vendor, Vendor Name, Reason for Selection of Vendor, Purchase Order Created, and Purchase Order No. The 'Purchase Order Created' column for the awarded lines (1028 and 1030) contains checkboxes that are checked. A red box highlights the 'Create Purchase Order' button in the ribbon bar.

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"/>	106063
1028	Bid Analysis Assignment	20000	First Up Consultants		<input type="checkbox"/>	106064
1029	Bid Analysis Assignment	20000	First Up Consultants		<input type="checkbox"/>	106064
1030	Bid Analysis Assignment	20000	First Up Consultants		<input type="checkbox"/>	106064
72130	Bid Analysis Assignment	10000	Fabrikam, Inc.		<input type="checkbox"/>	106063
FA0000020	Bid Analysis Assignment	30000	Graphic Design Institute		<input 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

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"/>	106063
1028	Bid Analysis Assignment	20000	First Up Consultants		<input type="checkbox"/>	106064
1029	Bid Analysis Assignment	20000	First Up Consultants		<input type="checkbox"/>	106064
1030	Bid Analysis Assignment	20000	First Up Consultants		<input type="checkbox"/>	106064
72130	Bid Analysis Assignment	10000	Fabrikam, Inc.		<input type="checkbox"/>	106063
FA0000020	Bid Analysis Assignment	30000	Graphic Design Institute		<input type="checkbox"/>	106065

Dynamics 365 Business Central

Bid Analysis

BID0002 · 2026 Requisitions

Home Prepare Print/Send Request Approval Bid Navigate | More options

Request for Quotation Purchase Orders Vendor Evaluations

General >

Vendors >

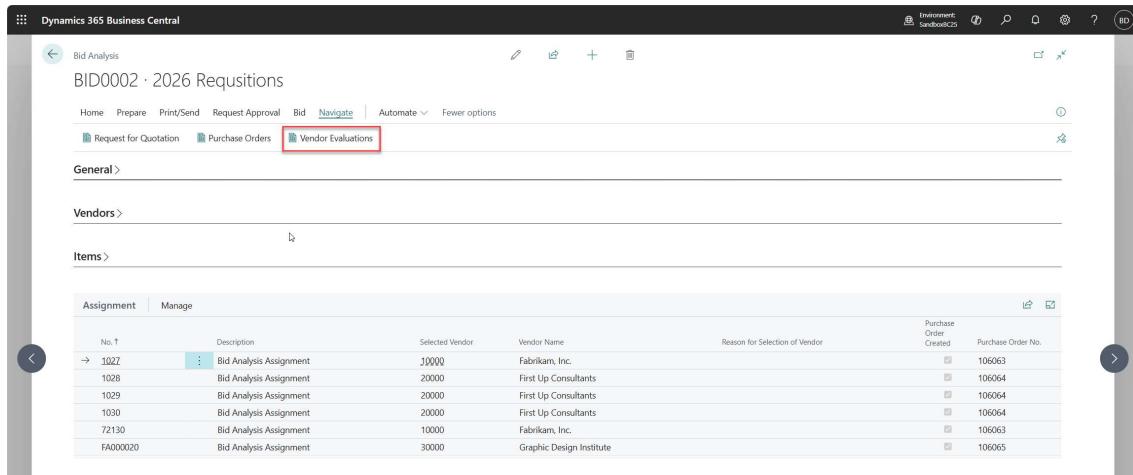
Items >

Purchase Orders

Purchase Orders: All

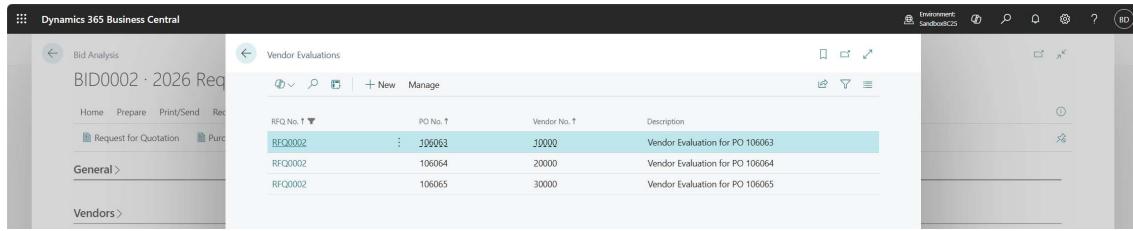
No. ↑	Buy-from Vendor No.	Buy-from Vendor Name	Vendor Authorizat. No.	Location Code	Construction Project Code	Purchaser Code	Department Code	Customergr. Code	Doc. Date
106063	10000	Fabrikam, Inc.				ADM	MEDIUM	12/	
106064	20000	First Up Consultants				ADM	MEDIUM	12/	
106065	30000	Graphic Design Inst...				ADM	MEDIUM	12/	

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



The screenshot shows the Dynamics 365 Business Central interface for Bid Analysis. The main title is "BID0002 · 2026 Requisitions". The ribbon bar includes "Home", "Prepare", "Print/Send", "Request Approval", "Bid", "Navigate", "Automate", and "Fewer options". The "Bid" tab is selected. A red box highlights the "Vendor Evaluations" button in the ribbon. Below the ribbon, there are sections for "General", "Vendors", and "Items". The "Assignment" section is expanded, showing a table of vendor assignments:

No. †	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	

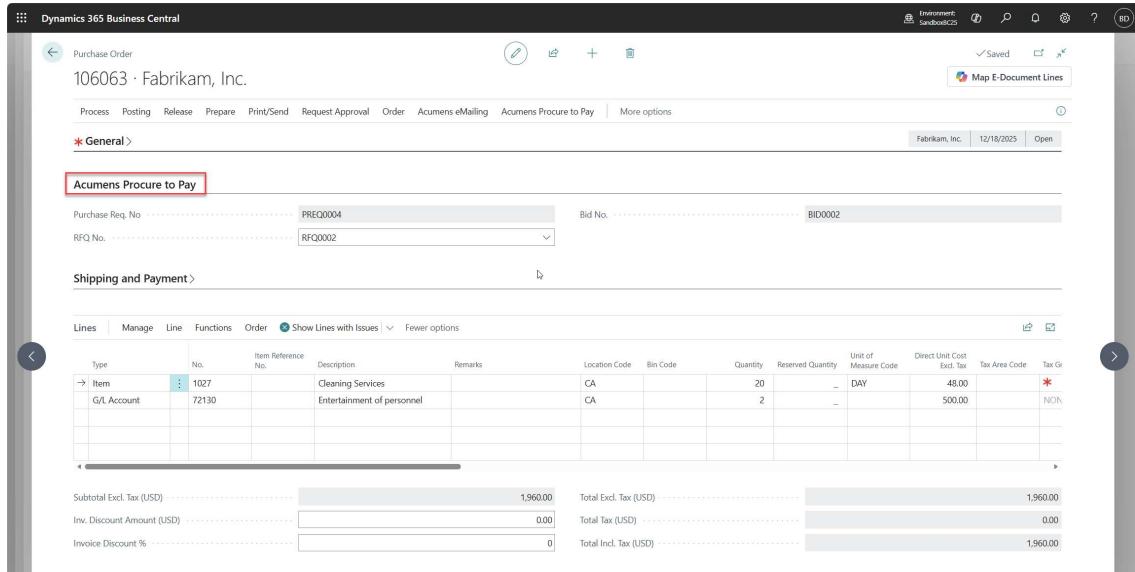


The screenshot shows the Dynamics 365 Business Central interface for Vendor Evaluations. The main title is "BID0002 · 2026 Requisitions". The ribbon bar includes "Home", "Prepare", "Print/Send", "Request Approval", "Bid", "Vendor Evaluations", "Manage", and "Fewer options". The "Vendor Evaluations" tab is selected. The table shows vendor evaluations:

RFQ No. †	PO No. †	Vendor No. †	Description
RFQ0002	106063	10000	Vendor Evaluation for PO 106063
RFQ0002	106064	20000	Vendor Evaluation for PO 106064
RFQ0002	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:



The screenshot shows the Dynamics 365 Business Central Purchase Order screen for a company named 'Fabrikam, Inc.' (Order No. 106063). The 'Acumens Procure to Pay' section is highlighted with a red box. The purchase request number is PREQ0004, and the bid number is BID0002. The RFQ number is RFQ0002. The 'Shipping and Payment' section shows a single line item for 'Clearing Services' (Item No. 1027) with a quantity of 20. The unit of measure is 'DAY', and the direct unit cost is 48.00. The tax area code is marked with a red asterisk. The total amount is 1,960.00. The bottom of the screen shows the standard Business Central Purchase process details.

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		Clearing 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:

Related Purchase Order:

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

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

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	
1027	Cleaning Services	50.00	48.00	48.00	20	20	10	0	0	12/19/2025	12/31/2025	
72130	Entertainment of personnel	500.00	500.00	500.00	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.

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)

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	Purch. Inv. No.	P. R.
→ 1027	48.00	48.00	20	20	10	10	0	12/19/2025	12/22/2025			0	108248	
72130	500.00	500.00	2	2	2	2	0	12/18/2025	12/22/2025			0	108248	
1027	48.00	48.00	20	20	10	10	0	12/19/2025	12/31/2025			0	108248	1

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:

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	Performance Code	Rate	Posted Purch. Inv. No.
→ 1027	Cleaning Services	50.00	48.00	48.00	20	20	10	10	0	12/19/2025	12/22/2025			7	108248
1027	Cleaning Services	50.00	48.00	48.00	20	20	10	10	0	12/19/2025	12/31/2025			6	108248
72130	Entertainment of personnel	500.00	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

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	Performance Code	Rate	Posted Purch. Inv. No.
→ 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:

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	Performance Code	Rate	Posted Purch. Inv. No.
→ 1027	Cleaning Services	50.00	48.00	48.00	20	20	10	10	0	12/19/2025	12/22/2025			7	108248
1027	Cleaning Services	50.00	48.00	48.00	20	20	10	10	0	12/19/2025	12/31/2025			6	108248
72130	Entertainment of personnel	500.00	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

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	6.46667

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	Posted Purch. Inv. No.	Rate	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:

The image contains three screenshots of the Dynamics 365 Business Central interface, illustrating the setup and execution of RFQ Mandatory.

Screenshot 1: Vendor Card (Acumens Procure To Pay)

This screenshot shows the Vendor Card for "10000 · Fabrikam, Inc.". The "RFQ Mandatory" toggle switch is highlighted with a red box. The vendor card also displays financial information like balance and due amounts.

Screenshot 2: Purchase Order (106054 · Fabrikam, Inc.)

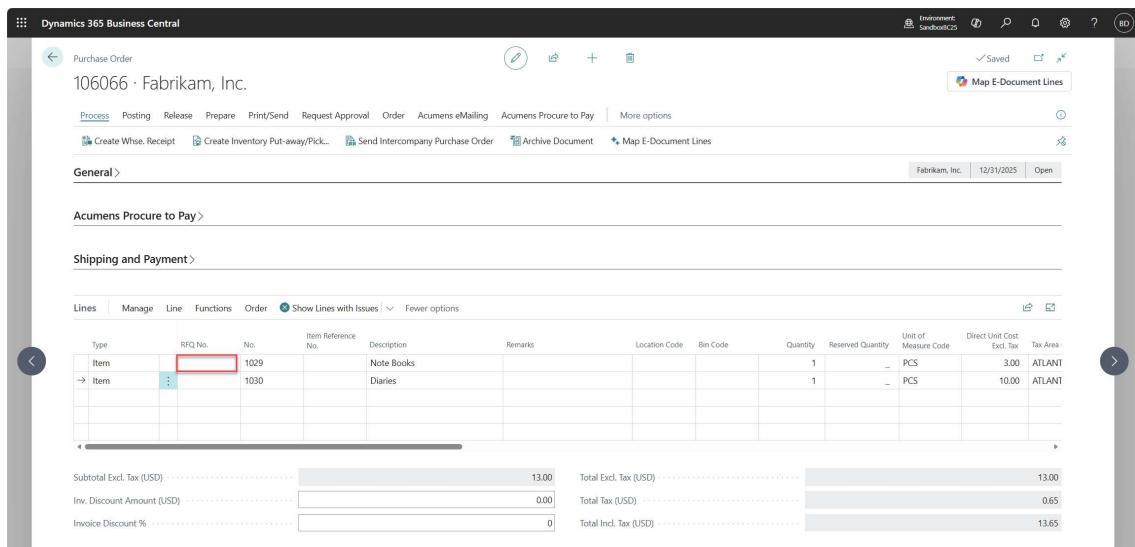
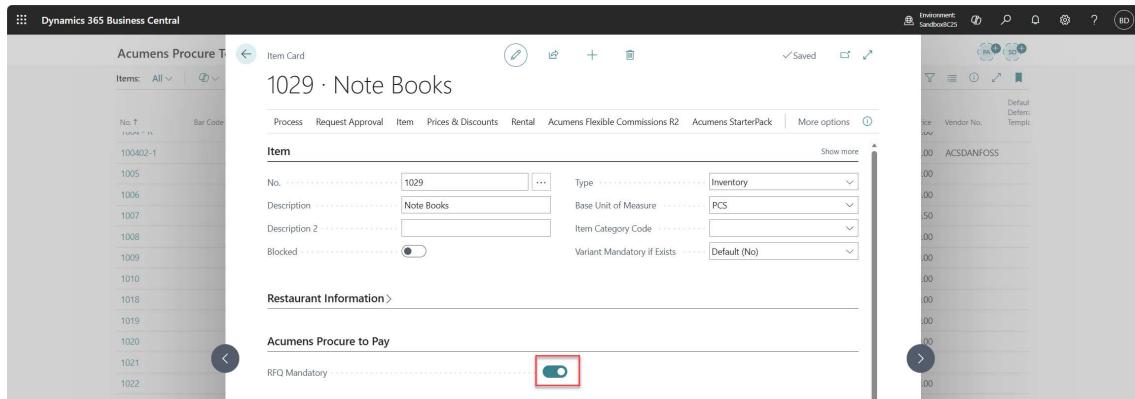
This screenshot shows a Purchase Order for "106054 · Fabrikam, Inc.". The "RFQ No." field is highlighted with a red box. The purchase order details include items, quantities, and total costs.

Screenshot 3: Error Messages

This screenshot shows an error message in the Error Messages list: "RFQ No. must have a value in Purchase Header: Document Type=Order, No.=106054. It cannot be zero or empty." The error message is highlighted with a red box.

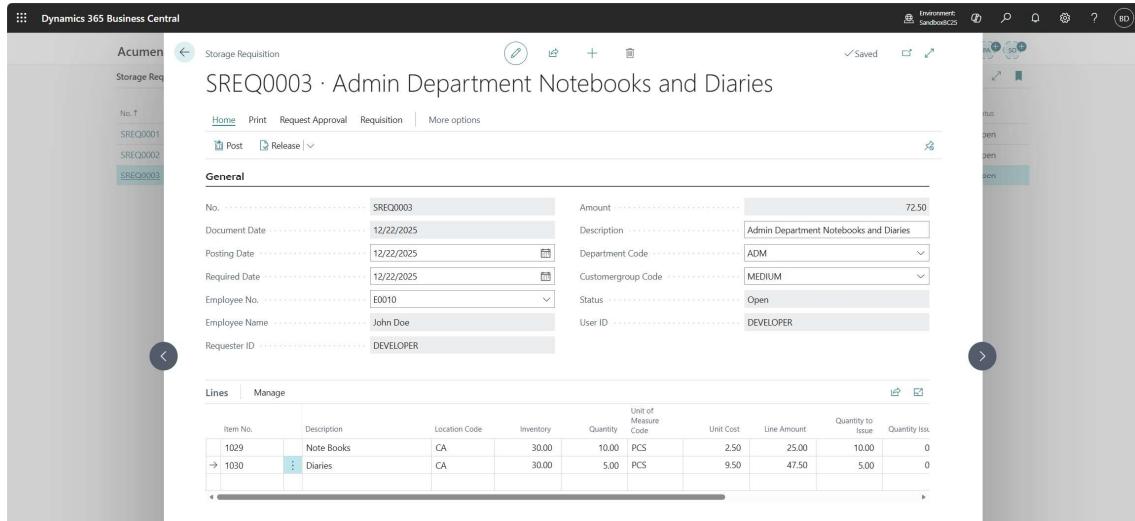
This screenshot shows an error message in the Error Messages list: "RFQ No. must have a value in Purchase Header: Document Type=Order, No.=106054. It cannot be zero or empty." The error message is highlighted with a red box.

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

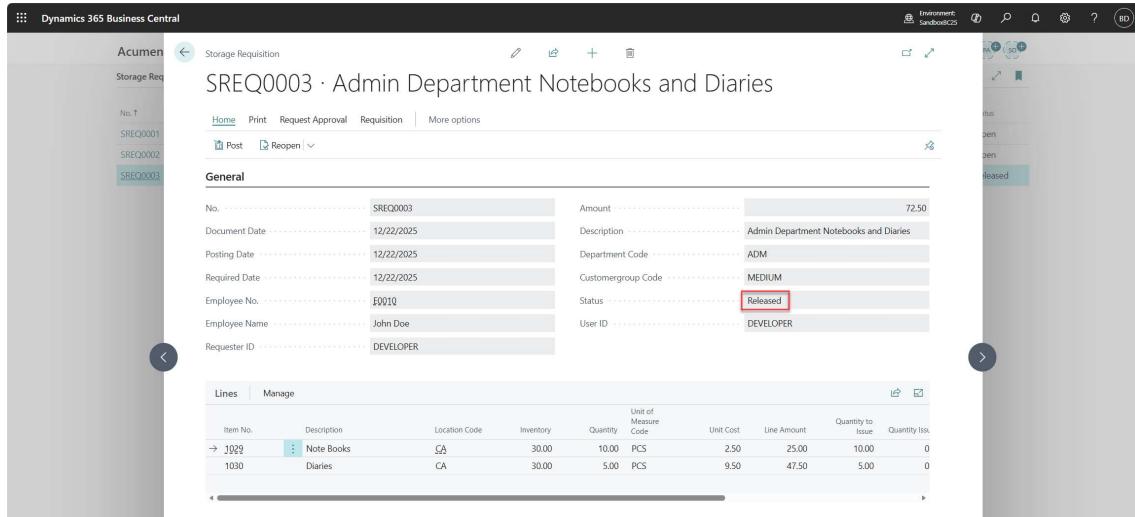


7. Storage Requisition:

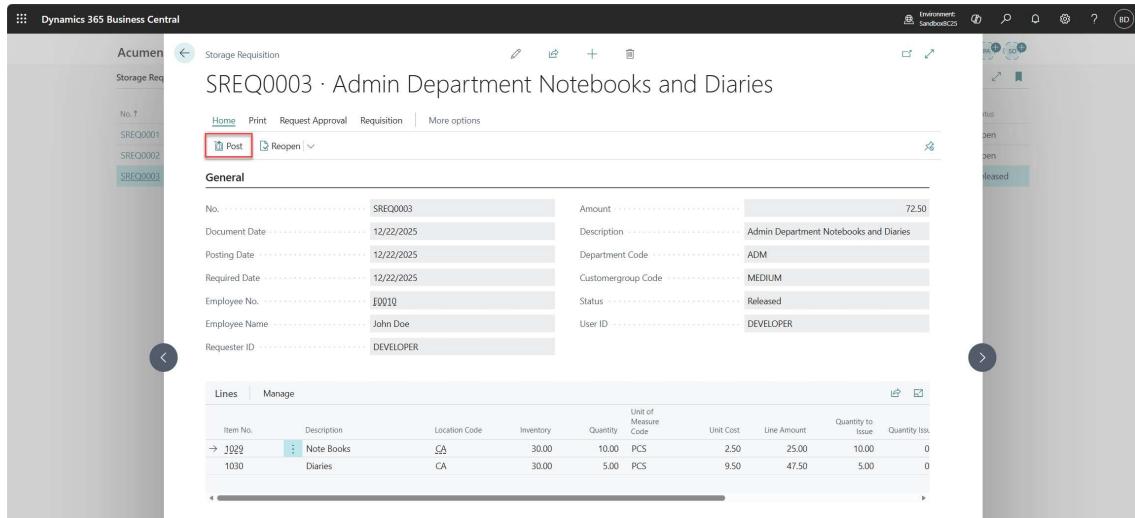
This is an internal document used to disburse items to the Employees after they have been purchased.



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



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



SREQ0003 · Admin Department Notebooks and Diaries

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** Customer Group Code **MEDIUM**

Employee No. **E0010** Status **Released**

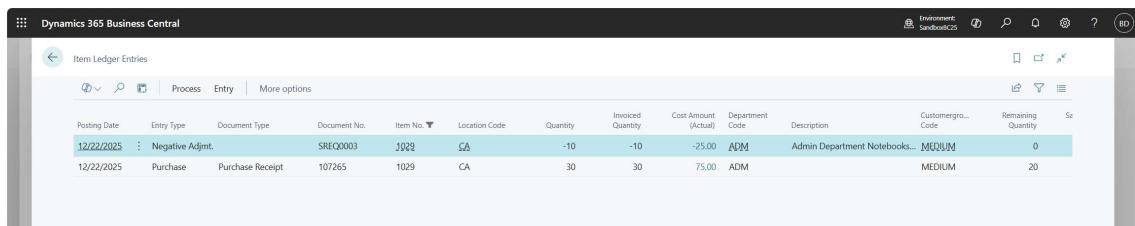
Employee Name **John Doe** User ID **DEVELOPER**

Requester ID **DEVELOPER**

Lines Manage

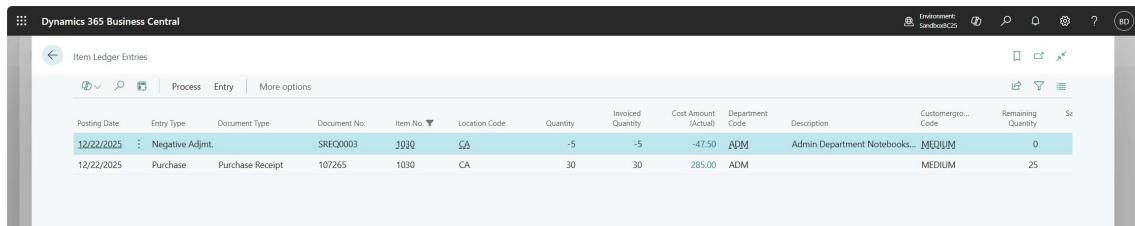
Item No.	Description	Location Code	Inventory	Quantity	Unit of Measure Code	Unit Cost	Line Amount	Quantity to Issue	Quantity Issued
→ 1029	Note Books	CA	30.00	10.00	PCS	2.50	25.00	10.00	0
1030	Diaries	CA	30.00	5.00	PCS	9.50	47.50	5.00	0

Posted Entries:



Posting Date **12/22/2025** Entry Type **Negative Adjmt.** Document Type **Storage Requisition** Document No. **SREQ0003** Item No. **1029** Location Code **CA** Quantity **-10** Invoiced Quantity **-10** Cost Amount (Actual) **-25.00** Department Code **ADM** Description **Admin Department Notebooks and Diaries** Customer Group Code **MEDIUM** Remaining Quantity **0**

12/22/2025 Purchase Purchase Receipt Document No. 107265 Item No. 1029 Location Code CA Quantity 30 Invoiced Quantity 30 Cost Amount (Actual) 75.00 Department Code ADM Description Admin Department Notebooks and Diaries Customer Group Code MEDIUM Remaining Quantity 20



Posting Date **12/22/2025** Entry Type **Negative Adjmt.** Document Type **Storage Requisition** Document No. **SREQ0003** Item No. **1029** Location Code **CA** Quantity **-5** Invoiced Quantity **-5** Cost Amount (Actual) **-47.50** Department Code **ADM** Description **Admin Department Notebooks and Diaries** Customer Group Code **MEDIUM** Remaining Quantity **0**

12/22/2025 Purchase Purchase Receipt Document No. 107265 Item No. 1030 Location Code CA Quantity 30 Invoiced Quantity 30 Cost Amount (Actual) 285.00 Department Code ADM Description Admin Department Notebooks and Diaries Customer Group Code MEDIUM Remaining Quantity 25