



Request For Quote

Reference Manual

**Integrates with
Microsoft Dynamics™ GP v10**

Copyright

Program Copyright © 1996-2009 Integrated Software, Inc.

Portions Copyright © 2005-2008 Microsoft Corporation, Portions Copyright © 1984-2000 FairCom Corporation. All rights reserved.

This work and the computer programs to which it relates are the property of, and embody trade secrets and confidential information proprietary to, Integrated Software, Inc., and may not be reproduced, copied, disclosed, transferred, adapted or modified without the express written approval of Integrated Software, Inc.

This Reference Manual Copyright © 2009 Integrated Software, Inc. Printed in USA All rights reserved. This document may not, in whole or in any part, be copied, photocopied, reproduced, translated, transmitted or reduced to any electronic medium or machine-readable form without prior consent, in writing from Integrated Software, Inc.

Trademarks

ISI is a trademark of Integrated Software, Inc.

Other company or product names mentioned may be trademarks or registered trademarks of their respective holders.

Revision Date: January 9, 2009

Integrated Software, Inc.
2060 Palm Bay Road NE, Suite 4
Palm Bay, Florida 32905
Office: (321) 984-1986
Fax: (321) 951-4291
Email: sales@isiusa.com
support@isiusa.com
website: www.isiusa.com

INTEGRATED SOFTWARE LICENSE TERMS

These license terms are an agreement between Integrated Software Incorporated and you. Please read them. They apply to the software named above, which includes the media on which you received it, if any. The terms also apply to any Integrated Software updates, supplements, Internet-based services, and support services for this software, unless other terms accompany those items. If so, those terms apply. These license terms supersede the license terms embedded in the software. By installing, having installed, or using the software, you accept these terms. If you do not accept them, do not install, have installed or use the software. If you comply with these license terms, you have the rights below.

1. OVERVIEW.

- a. Software. The software includes server software; if any, client software that can be installed on devices and used with the server software, modules that may be separately licensed and any fixes, patches or updates for the software.
- b. License Model. The software is licensed for the number of user licenses for the Microsoft Dynamics GP into which it is integrated.

2. INSTALLATION AND USE RIGHTS.

You may install an unlimited number of copies of the modules you have licensed for your system database. You must obtain a separate license for each Company system database if you wish to install a module for multiple Company system databases.

3. ADDITIONAL LICENSING REQUIREMENTS AND/OR USE RIGHTS.

- a. Multiplexing. Hardware or software you use to pool connections, or reduce the number of devices or users that directly access or use the software (sometimes referred to as "multiplexing" or "pooling"), does not reduce the number of licenses you need.
- b. Additional Functionality. Integrated Software may provide additional functionality for the software. Other license terms and fees may apply.

4. BENCHMARK TESTING.

You must obtain Integrated Software's prior written approval to disclose to a third party the results of any benchmark test of the software.

5. SCOPE OF LICENSE.

The software is licensed, not sold. This agreement only gives you some rights to use the software. Integrated Software reserves all other rights. Unless applicable law or a separate written contract with Integrated Software gives you more rights despite this limitation, you may use the software only as expressly permitted in this agreement. In doing so, you must comply with any technical limitations in the software that only allow you to use it in certain ways. You may only use the software for your internal business purposes. You may not work around any technical limitations in the software; reverse engineer, decompile or disassemble the software, except and only to the extent that applicable law expressly permits, despite this limitation; make more copies of the software than specified in this agreement or allowed by applicable law, despite this limitation; publish the software for others to copy; rent, lease or lend the software; or use the software for commercial software hosting services or operating a service bureau.

Rights to access the software do not give you any right to implement Integrated Software patents or other Integrated Software intellectual property in software or devices.

6. BACKUP COPY.

You may make multiple copies of the software for backup and testing purposes, so long as such copies are not used in production. Your backup copies may be hosted by a third party on your behalf.

7. SOFTWARE TRANSFER.

You may not transfer the software to a third party without Integrated Software's express written consent.

8. DOCUMENTATION.

Any person that has valid access to your computer or internal network may copy and use the documentation for your internal, reference purposes.

9. DOWNGRADE.

Instead of installing the software, you may install and use an earlier version. This agreement applies to your use of the earlier version. If the earlier version includes different components, any terms for those components in the agreement that comes with the earlier version apply to your use of them. Integrated Software is not obligated to supply earlier versions to you. At any time, you may replace an earlier version with this version of the software.

10. EXPORT RESTRICTIONS.

The software is subject to United States export laws and regulations. You must comply with all domestic and international export laws and regulations that apply to the software. These laws include restrictions on destinations, end users and end use.

11. SUPPORT SERVICES.

Integrated Software provides support services for the software as described at <http://www.isiusa.com/>

12. ENTIRE AGREEMENT.

This agreement (including the warranty below), and the terms for supplements, updates, Internet-based services and support services that you use, are the entire agreement for the software and support services.

13. APPLICABLE LAW.

a. United States. If you acquired the software in the United States, Florida state law governs the interpretation of this agreement and applies to claims for breach of it, regardless of conflict of laws principles. The laws of the state where you are located govern all other claims, including claims under state consumer protection laws, unfair competition laws, and in tort.

b. Outside the United States. If you acquired the software in any other country, the laws of that country apply.

14. LEGAL EFFECT.

This agreement describes certain legal rights. You may have other rights under the laws of your state or country. You may also have rights with respect to the party from whom you acquired the software. This agreement does not change your rights under the laws of your state or country if the laws of your state or country do not permit it to do so.

15. INFRINGEMENT AND MISAPPROPRIATION CLAIMS.

If Integrated Software receives information concerning an infringement claim related to the software, Integrated Software may, at its expense and without obligation to do so, either (i) procure for you the right to continue to run the software, or (ii) modify the software or replace it with a functional equivalent, to make it non-infringing, in which case you will stop running the software immediately. If, as a result of an infringement claim, your use of the software is enjoined by a court of competent jurisdiction, Integrated Software will, at its option, either procure the right to continue its use, replace it with a functional equivalent, modify it to make it non-infringing, or refund the amount paid and terminate this license.

If any other type of third party claim is brought against you regarding Integrated Software's intellectual property, you must notify us promptly in writing. Integrated Software may, at its option, choose to treat these claims as being covered by this section. This Section provides your exclusive remedy for third party infringement and trade secret misappropriation claims.

16. LIMITATION ON AND EXCLUSION OF DAMAGES.

You can recover from Integrated Software and its suppliers only direct damages up to the amount you paid for the software. You cannot recover any other damages, including consequential, lost profits, special, indirect or incidental damages.

This limitation applies to anything related to the software, services, content (including code) on third party Internet sites, or third party programs; and claims for breach of contract, breach of warranty, guarantee or condition, strict liability, negligence, or other tort to the extent permitted by applicable law.

It also applies even if repair, replacement or a refund for the software does not fully compensate you for any losses; or Integrated Software knew or should have known about the possibility of the damages.

Some jurisdictions do not allow the exclusion or limitation of incidental or consequential damages, so the above limitation or exclusion may not apply to you.

LIMITED WARRANTY

A. LIMITED WARRANTY.

If you follow the instructions, the software will perform substantially as described in the Integrated Software materials that you receive in or with the software.

B. TERM OF WARRANTY; WARRANTY RECIPIENT; LENGTH OF ANY IMPLIED WARRANTIES.

The limited warranty covers the software for one year after acquired by you. If you receive supplements, updates, or replacement software during that year, they will be covered for the remainder of the warranty or 30 days, whichever is longer.

To the extent permitted by law, any implied warranties, guarantees or conditions last only during the term of the limited warranty. Some jurisdictions do not allow limitations on how long an implied warranty, guarantee or condition lasts, so these limitations may not apply to you.

C. EXCLUSIONS FROM WARRANTY.

This warranty does not cover problems caused by your acts (or failures to act), the acts of others, or events beyond Integrated Software's reasonable control.

D. REMEDY FOR BREACH OF WARRANTY.

Integrated Software will repair or replace the software at no charge. If Integrated Software cannot repair or replace it, Integrated Software will refund the amount shown on your receipt for the software. It will also repair or replace supplements, updates and replacement software at no charge. If Integrated Software cannot repair or replace them, it will refund the amount you paid for them, if any. You must uninstall the software and return any media and other associated materials to Integrated Software with proof of purchase to obtain a refund. These are your only remedies for breach of the limited warranty.

E. CONSUMER RIGHTS NOT AFFECTED.

You may have additional consumer rights under your local laws, which this agreement cannot change.

F. WARRANTY PROCEDURES.

You need proof of purchase for warranty service. For warranty service or information about how to obtain a refund, contact Integrated Software at (321) 984-1986 or send email to support@isiusa.com.

G. NO OTHER WARRANTIES.

The limited warranty is the only direct warranty from Integrated Software. Integrated Software gives no other express warranties, guarantees or conditions. Where allowed by your local laws, Integrated Software excludes implied warranties of merchantability, fitness for a particular purpose and non-infringement. If your local laws give you any implied warranties, guarantees or conditions, despite this exclusion, your remedies are described in the Remedy for Breach of Warranty clause above, to the extent permitted by your local laws.

H. LIMITATION ON AND EXCLUSION OF DAMAGES FOR BREACH OF WARRANTY.

The Limitation on and Exclusion of Damages clause above applies to breaches of this limited warranty. This warranty gives you specific legal rights, and you may also have other rights which vary from state to state or country to country.

COMPLETE AGREEMENT

By installing or using this software, you acknowledge that you have read this license agreement, and that it is the complete and exclusive agreement between you and ISI regarding the software and accompanying documentation. This agreement is governed by the laws of the State of Florida applicable to the contracts made and performed therein.

TABLE OF CONTENTS

Overview	1
Before You Begin.....	2
Installing Request For Quote	3
About Request For Quote Window	5
Create RFQ Tables.....	6
The Request For Quote Setup Window	7
Overview of the Request For Quote Setup	7
Buttons in the Request For Quote Setup Window	7
Fields in the Request For Quote Setup Window	8
The RFQ Addresses Window	10
Buttons in this Window	10
Fields in this Window	11
The Request For Quote Entry Window	12
Overview of the Request For Quote Entry Window	12
Buttons in the Request For Quote Entry Window	13
Fields in the Request For Quote Entry Window	14
The Request For Quote Entry Scrolling Window	17
Overview of the Request For Quote Entry Scrolling Window	17
Buttons in the Request For Quote Entry Scrolling Window	17
Fields in the Request For Quote Entry Scrolling Window	17
Entering Vendor Responses.....	19
The RFQ Vendor Window	20
Overview of the RFQ Vendor Window	20
Buttons in the RFQ Vendor Window	20
Fields in the RFQ Vendor Window	21
Vendor Information for PO:	22
Customer Information for Quote:	23
The Request For Quote Report.....	24
Creating RFQ PDF Documents from RFQ Reports.....	25
Emailing from the RFQ Vendor Window	28
The RFQ Copy Window	31
Buttons in the RFQ Copy Window	31
Fields in the RFQ Copy Window	31
The RFQ Reports Window	33
Buttons in the RFQ Reports Window	33
Fields in the RFQ Reports Window	33
The Request For Quote Documents List.....	34
Exporting and Importing RFQ Lines data to Excel.....	37
Exporting RFQ Lines information from the Information Pane to Excel:	37
Importing data from Excel to the RFQ Lines Table:.....	38

How to Uninstall the Request For Quote Product 40
 The Uninstall Procedure 40
Request For Quote Tables 42

OVERVIEW

Request For Quote (RFQ) is integrated with Microsoft Dynamics™ GP Inventory, Purchase Order and Sales Order Processing modules. As a user, you may choose to integrate with Purchase Order or Sales Order Processing or both according to your needs.

Request For Quote allows you to create multiple Requests For Quote (RFQs) for multiple vendors from a single Request For Quote Entry window. After the RFQ entry has been completed, you may send the RFQ to one or multiple vendors. Once the response from the Vendor has been received, the user will return to the same entry window to record responses from the Vendor(s). Request For Quote will handle both Inventory and Non-inventory items.

Once a Vendor has been chosen, the user can automatically create a Purchase Order for the chosen Vendor. This is not limited to one vendor. You may choose to create Purchase Orders independently for multiple vendors based on the item(s) you wish to purchase from each Vendor.

If you choose to integrate RFQ with Sales Order Processing and the inventory items are intended for a particular Customer, you may automatically create a Sales Quote for that Customer.

BEFORE YOU BEGIN

The information in this manual is presented with the assumption that you have an understanding of the file, folder or directory structure of the operating system that you are using. If you need more information about the operating system refer to the manuals that came with your operating system software before installing and running this software.

It is also assumed that you have knowledge of the Great Plains operating environment. This manual uses terminology that is associated with Microsoft Business Solutions -Great Plains. If you need further information about the Great Plains environment refer to the Microsoft Business Solutions - Great Plains System Manager User's Guide before installing this software.

To operate the ISI Request For Quote (ISI RFQ) software Great Plains must first be loaded and installed. The following Great Plains setup procedures should be completed before installing the ISI RFQ:

- Company Setup
- Receivables Management Setup & Customer Cards
- Payables Management Setup & Vendor Cards
- Inventory Setup & Item Cards
- Sales Order Processing (if you wish to integrate RFQ with SOP)
- Purchase Order Processing (if you wish to integrate RFQ with POP)

INSTALLING REQUEST FOR QUOTE

This section describes how to install Request For Quote (RFQ). It is assumed that you have a familiarity with the installation of Microsoft Dynamics GP.

These instructions are for a new installation. If you are upgrading from a previous version, you will receive a separate upgrade instruction document.

The initial setup can be done on any workstation where Dynamics GP is installed. Close Dynamics GP on this workstation. It is recommended that all users be logged out of Dynamics GP while installing the initial setup.

The RFQ delivery contains a file with the extension **.CNK** (this is a Dynamics chunk file) and a manual which can be opened by Acrobat Reader. Copy the chunk file to the directory that contains the **DYNAMICS.DIC** file.

At the same time, copy file RFQ v10 help.chm to the same location. This is needed for the help functionality.

If you wish to open the manual from help buttons on the windows, copy the manual (RFQman) into the Documentation directory which is a subdirectory of the Dynamics Directory. If the Documentation directory does not exist, you may create one at this time.

Log on to Dynamics as sa. You should view the following question:

“New code must be includedDo you wish to include new code now?”

Click on “Yes”. If you click on “No” the chunk file will not be opened and installed.

The following is a list of the windows for the RFQ product. These can all be accessed from the menu lists as detailed below.

Create RFQ Tables	Microsoft Dynamics GP >> Tools >> Setup >> Purchasing >> Request for Quote Create Tables Creates the tables and stored procedures for Microsoft SQL systems. Sets SQL permissions for the DYNGROUP.
RFQ Setup	Microsoft Dynamics GP >> Tools >> Setup >> Purchasing >> Request for Quote Setup This item opens the Request For Quote Setup Window.
RFQ Entry	Transactions >> Purchasing >> Request for Quote Entry This item opens the Request For Quote Entry Window.
RFQ Copy	Transactions >> Purchasing >> Request for Quote Entry

RFQ Reports

This item opens the Request For Quote Copy Window.

Reports >> Purchasing >> Request for Quote Reports

This item opens the Request For Quote Reports Window.

ABOUT REQUEST FOR QUOTE WINDOW

The About Request for Quote window can be viewed from the "Additional" button on the About Great Plains window as follows:

From the Help icon on the top right of the Dynamics screen, choose the sub menu "About Microsoft Dynamics GP..."

From the "About Microsoft Dynamics GP" window, click on the menu "Additional" and choose "About Request For Quote".

CREATE RFQ TABLES

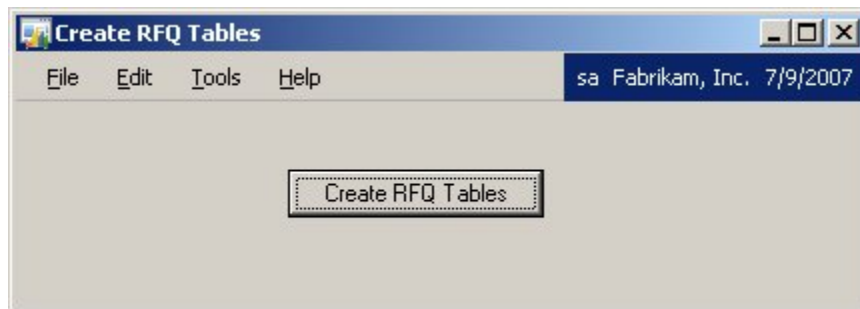
The first step after installing RFQ on the first workstation is to run Create Tables.

Open the Create RFQ Tables window using the following menu navigation:



Microsoft Dynamics GP >> Tools >> Setup >> Purchasing >> Request for Quote Create Tables

Click on the menu item "Request for Quote Create Tables" and open the window as shown below. Click on the button "Create RFQ Tables". This process will create SQL tables and associated stored procedures needed for the RFQ product. After creating tables, the process will also set the necessary permissions for all the RFQ tables and stored procedures. These permissions will be added to the DYNGRP role. As a result, all users in the DYNGRP will have the necessary permissions.



For users who are not part of the DYNGRP, please assign permissions individually to each user. Now you are ready to perform the Request For Quote Setup.

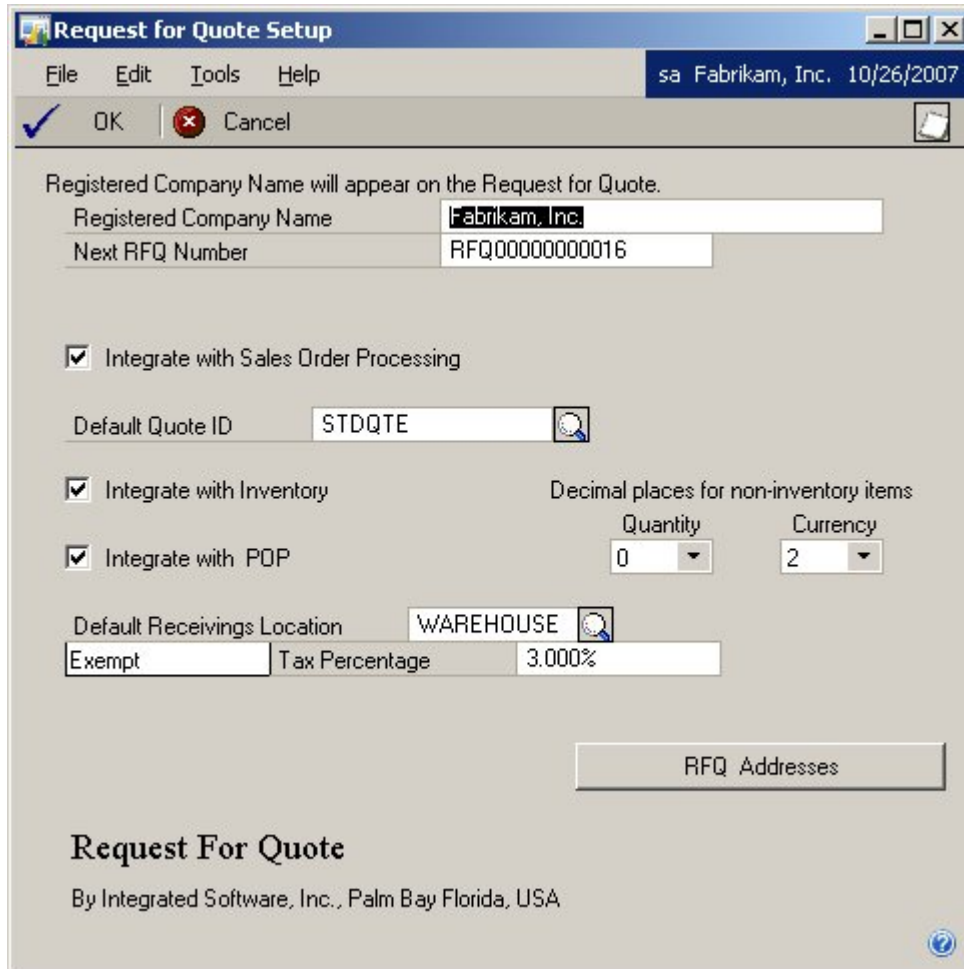
THE REQUEST FOR QUOTE SETUP WINDOW

This section describes the Request For Quote Setup window. You will need to enter all required data before creating any RFQs. The values entered in this window are necessary for the program to post and print properly.


Overview of the Request For Quote Setup


This window is used to enter setup information for the ISI RFQ program. This can be accessed from the menu:

 Microsoft Dynamics GP >> Tools >> Setup >> Purchasing >> Request for Quote Setup



The screenshot shows the 'Request for Quote Setup' dialog box. The title bar includes the text 'Request for Quote Setup' and standard window controls. The menu bar contains 'File', 'Edit', 'Tools', and 'Help'. The status bar shows 'sa Fabrikam, Inc. 10/26/2007'. The main area contains the following fields and options:

- Registered Company Name will appear on the Request for Quote.
- Registered Company Name:
- Next RFQ Number:
- Integrate with Sales Order Processing
- Default Quote ID: 
- Integrate with Inventory
- Decimal places for non-inventory items:

Quantity	Currency
<input type="text" value="0"/>	<input type="text" value="2"/>
- Integrate with POP
- Default Receiving Location: 
- Exempt: Tax Percentage:
-

Request For Quote
By Integrated Software, Inc., Palm Bay Florida, USA

Buttons in the Request For Quote Setup Window

The Request For Quote Setup window contains the following buttons.

- | | |
|---------------|--|
| OK button | Click on this button to save information entered in this window. |
| Cancel button | Click on this button to close the window without saving changes. |

Looking Glass button	<p>A Looking Glass button is provided for the Default Receiving Location. Click on this button to open a lookup window from which to choose a Default Receiving Location.</p> <p>A Looking Glass button is provided for the Default Quote ID for Sales Order Processing. Click on this button to open a lookup window from which to choose a Default Quote ID if you are integrating with SOP.</p>
RFQ Addresses button	Click on this button to open the Request For Quote Addresses Window. RFQ Addresses entered in this window are default addresses to be printed on the Request for Quote report.
About RFQ button	Click on this button to open the "About Request For Quote" window, described earlier in this document.

Fields in the Request For Quote Setup Window

Following is a detailed list of fields in the Request For Quote Setup window and a description of their function and use.

Registered Company Name	Required Field - Enter the Company Name in this field. The entry in this field must be exactly as the name appears in Dynamics windows for the company. If the entry does not match you will not be permitted to continue.
Next RFQ Number	<p>Required Field - Enter the Next RFQ Number. This number will be used when you create the next Request for Quote in the Request for Quote Entry window.</p> <p>IMPORTANT: Exercise care when choosing the first Request for Quote number. This is an auto-incrementing field in the Request for Quote Entry window. The Request for Quote field is an alphanumeric control field limited to a total of 20 characters. Only 17 of the characters can be entered into the Next RFQ Number entry field. If the RFQ numbering is alphanumeric only the numerical part of the RFQ number will auto-increment when creating the next RFQ number. The alpha characters will not change.</p> <p>Be sure to create enough numeric character spaces so the RFQ number will not recycle back to the beginning before you are ready to remove old RFQ orders.</p> <p>For example: if the Next RFQ Number field is set to RFQ000000001, the numbers in the field will automatically increment by one to RFQ000000002 after a new RFQ is created. The last available RFQ number in this example would be RFQ999999999. When the last RFQ number is reached the system will recycle back to RFQ000000000. This example would allow for 999,999,999 unique RFQs in the RFQ file at one time.</p>
Integrate with	If the checkbox is marked and the Great Plains Sales Order

Sales Order Processing	<p>Processing module has been registered, ISI RFQ will be integrated with the Great Plains Sales Order Processing module.</p> <p>If you are integrated with Sales Order Processing, SOP Quotes may be created upon demand.</p>
Default Quote ID	<p>The Quote ID entered in this field must be a valid SOP Quote ID. The SOP Quote ID entered here will be used as the Quote ID when a Sales Quote is created by RFQ.</p>
Integrate with Inventory	<p>If this checkbox is marked and the Great Plains Inventory Control module has been registered, ISI RFQ will be integrated with the Great Plains Inventory Control module.</p>
Decimal Places for non-inventory items:	<p>Quantity - Select the number of decimal places for the quantities. This will be the number of decimal places that you will be required to enter for non-inventory item quantities.</p> <p>Currency - Select the number of decimal places for the currency. This will be the number of decimal places that you will be required to enter for non-inventory item prices.</p>
Integrate with POP	<p>If this checkbox is marked and the Great Plains Purchase Order Processing module has been registered, ISI RFQ will be integrated with the Great Plains Purchase Order Processing module.</p>
Default Receiving Location	<p>The location entered in this field must be a valid Company site. The location entered here will automatically fill the Receiving location field in other windows. The Receiving location may then be accepted or changed.</p>
Default Tax Visual Switch	<p>This field is a visual switch which appears to the left of the "Tax Percentage" label. The entry in this field will appear as the default in the Request For Quote Entry window. By clicking on this switch the field will alternate from "Taxable" to "Exempt". If "Taxable" is selected the tax amount will be computed from the Tax Percentage setup in this window. If "Exempt" is selected then the tax amount in the Request For Quote Entry window will be zero.</p>
Tax Percentage	<p>Enter the percentage you wish to use to calculate the sales tax.</p>

THE RFQ ADDRESSES WINDOW

This window is opened from a button on the Request For Quote Setup window. The addresses entered here will appear on the Request For Quote which is meant to be sent to Vendors.

Lookups are provided to retrieve addresses that are already set up for your company.

The first address line allows you to enter any slogan or comment you wish. This will appear at the top of the RFQ document.

The screenshot shows a window titled "RFQ Addresses" with a menu bar (File, Edit, Tools, Help) and a status bar (sa Fabrikam, Inc. 7/9/2007). The window contains an "OK" button and three sections of address data:

Registered Company Name: Fabrikam, Inc.
 The following lines will appear at the top of the Request for Quote under the Company Name:

	Company Address ID
Best Value Best Price	Primary
4277 West Oak Parkway	
Chicago, IL 60601-4277 United States	
(312)436-2671 * fax (312)436-2896	

The following will appear in the 'Bill To' location:

	Company Address ID
David Richards	INTERNATIONAL-C
38 Ave South	
Suite 32	
Winnipeg, MB R35 8T4 Canada	

The following will appear in the 'Ship To' location:

	Company Address ID
TWO, Inc. Warehouse	WAREHOUSE
4300 West Elm St.	
Chicago, IL 60601-4300 United States	

Buttons in this Window

The RFQ Addresses window contains the following buttons.

- Looking Glass button A Looking Glass button is provided for each Address ID.
- OK Click on this button to close the window.

Fields in this Window


Default Addresses for the Request For Quote report are provided here

Registered Company Name:	Registered Company Name for the Request For Quote Report is defaulted from Dynamics Company Name
Company Address ID	Enter or select Company Address ID associated with the Request for Quote for the first set of addresses.
Company Address fields	Will be defaulted from the above Address ID. This will print at the top of the RFQ. The first line allows you to enter any slogan or comment you wish. This will appear at the top of the RFQ.
Bill To location Address ID	Enter or select Company Address ID associated with the 'Bill To' location.
Bill To location address fields	Will be defaulted from the above Address ID. This will print in the Bill To Address on the RFQ.
Ship To location Address ID	Enter or select Company Address ID associated with the Ship To location.
Ship To location address fields	Will be defaulted from the above Address ID. This will print in the Ship To location on the RFQ.

THE REQUEST FOR QUOTE ENTRY WINDOW

This section describes the Request For Quote Entry window and its associated scrolling window. Also, within this section are detailed procedure for creating, saving and viewing existing RFQs.

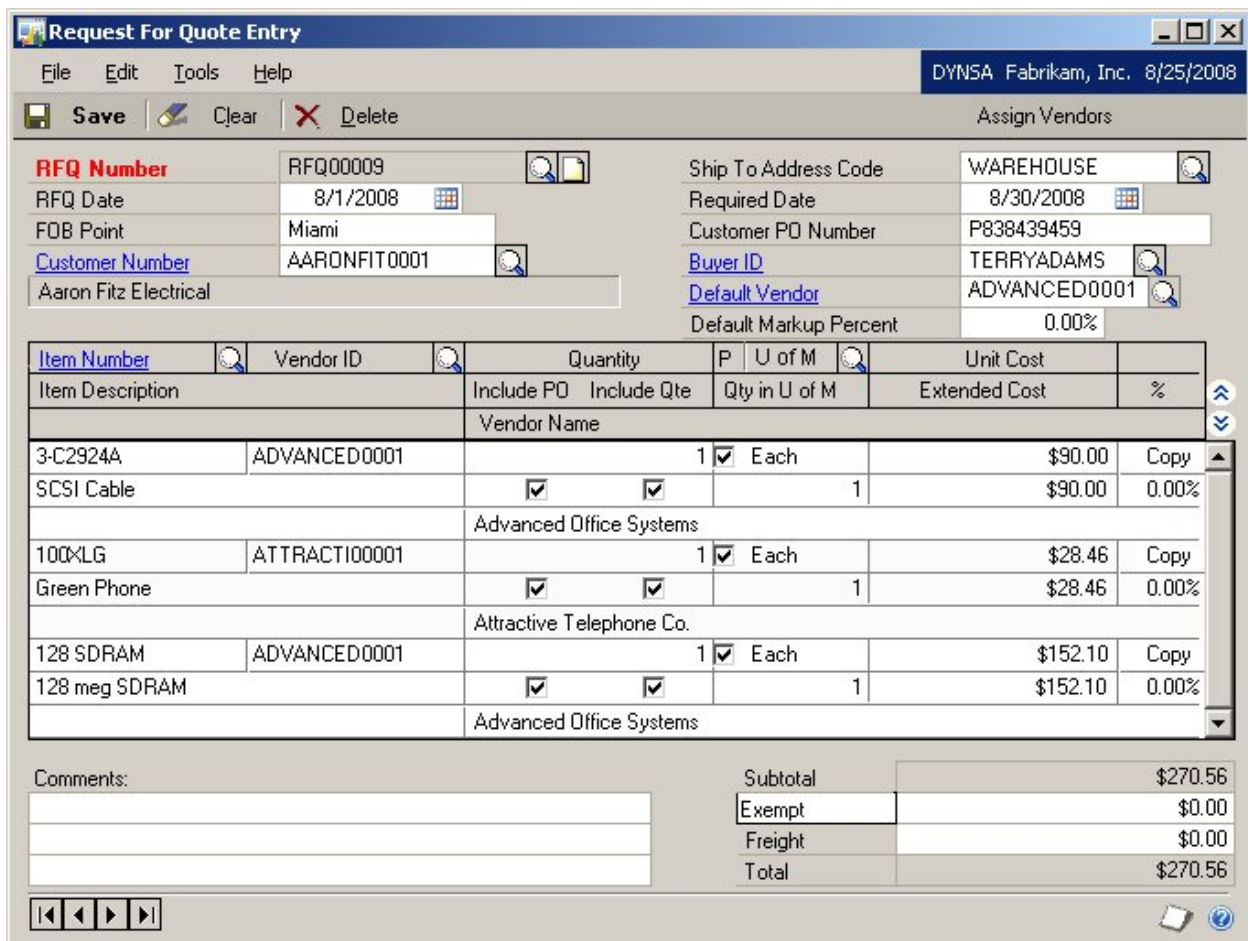
This window can be accessed from the menu navigation:

 Transactions >> Purchasing >> Request for Quote Entry

Overview of the Request For Quote Entry Window

Before you create your first RFQ, be sure to complete Request For Quote Setup described above.

You may view or edit any RFQ in this window.



Request For Quote Entry
 File Edit Tools Help
 DYN5A Fabrikam, Inc. 8/25/2008
 Save Clear Delete Assign Vendors

RFQ Number: RFQ00009
 RFQ Date: 8/1/2008
 FOB Point: Miami
 Customer Number: AARONFIT0001
 Aaron Fitz Electrical

Ship To Address Code: WAREHOUSE
 Required Date: 8/30/2008
 Customer PO Number: P838439459
 Buyer ID: TERRYADAMS
 Default Vendor: ADVANCED0001
 Default Markup Percent: 0.00%

Item Number	Vendor ID	Quantity	P	U of M	Unit Cost	
Item Description	Include PO	Include Qty	Qty in U of M	Extended Cost	%	
Vendor Name						
3-C2924A	ADVANCED0001	1	<input checked="" type="checkbox"/>	Each	\$90.00	Copy
SCSI Cable		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	\$90.00	0.00%
Advanced Office Systems						
100KLG	ATTRACTI00001	1	<input checked="" type="checkbox"/>	Each	\$28.46	Copy
Green Phone		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	\$28.46	0.00%
Attractive Telephone Co.						
128 SDRAM	ADVANCED0001	1	<input checked="" type="checkbox"/>	Each	\$152.10	Copy
128 meg SDRAM		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	\$152.10	0.00%
Advanced Office Systems						

Comments:

Subtotal: \$270.56
 Exempt: \$0.00
 Freight: \$0.00
 Total: \$270.56

When the Request For Quote Entry window opens, the cursor is set to the RFQ Number field. This value is auto-created each time the window is opened. You may access the other fields by tabbing to them or by using the mouse to click on the field.

Buttons in the Request For Quote Entry Window

Browse buttons at lower left	Click on a browse button to scroll through RFQ records. The sorting methods available in this window are to sort by RFQ Number.
Save button	Click on this button to save window information.
Clear button	Click on this button to clear current window information.
Delete button	Click on this button to delete the current Purchase Order record.
Assign Vendors button	Click on this button to open the RFQ Vendor window.
Show and Hide buttons	The Hide button will show only one line of data in this window and the Show button will show two lines of data.
Looking Glass Pointer	Zoom capabilities are provided for the following fields: Customer Number, Buyer ID, Default Vendor and Item Number.
Looking Glass buttons	Looking Glass buttons are provided next to each of the following fields: RFQ Number, Customer Number, Ship To Address, Buyer ID and Default Vendor ID in the main window; and Item Number, Vendor ID, and U of M in the scrolling window.
RFQ Number Looking Glass button	Click on this button to select an RFQ previously entered via RFQ Entry.
Ship To Address Looking Glass button	Click on this button to choose a Ship To Address Code.
Buyer ID Looking Glass button	Click on this button to choose a Buyer ID.
Default Vendor Looking Glass button	Click on this button to choose a Default Vendor. Once a default vendor is selected, when entering items in the Scrolling window, the Vendor ID field is defaulted to this Vendor.
Vendor ID Looking Glass button	Click on this button to choose a Vendor previously entered in the Vendor Cards.
Item Number Looking Glass button	Click on this button to open a window from which previously entered Inventory Item Number may be selected. The item number will be placed in the Scrolling window. To place an item on a particular line, first click on the line into which you desire the item number to be entered. If an item already

exists on that line, it will be replaced by the item selected.

U of M Looking Glass button Click on this button to open a window from which to select a Unit of Measure for the item on the selected line. Only the Units of Measure which have been previously set up in Inventory for the selected item will be accessible.

Fields in the Request For Quote Entry Window

Following is a detailed list of fields in the RFQ Entry window and a complete description of their function and use.

RFQ Number	<p>Required Field - The RFQ Number is unique for each RFQ. Each time the RFQ Entry window is opened or cleared by an operation, such as clicking on the Save, Delete, or Clear button, the next available RFQ number will appear. The next RFQ number may be reset in the setup window.</p> <p>When entering the next RFQ in the RFQ Entry window you can override the default RFQ by typing another number. When you save that overridden purchase order, the system will default back to the next available number.</p> <p>Example: The starting RFQ for the year is RFQ200001. The next numbers are RFQ200002, RFQ200003, RFQ200009 (overrides default), RFQ200004 (returns to next default number), RFQ200005, etc.</p>
RFQ Date	<p>The RFQ Date field will default to the current system date for Great Plains. The date may be edited. If the date entered is outside a valid range, you will be prompted to reenter the date.</p>
FOB Point	<p>Enter the FOB Point you wish to be printed on the RFQ.</p>

Customer Number	<p>Required Field for SOP integration only. The Customer Number matches the 'Customer ID' field in Customer Maintenance. To retrieve a customer you may type in the customer number in the Customer Number field or click the looking glass button to select a customer from Customers lookup window. By entering a partial customer number and then clicking the looking glass button, the Customer lookup window will open with a customer number selected which is closest to the number that was entered in the Customer Number field.</p> <p>The field directly below the Customer Number field will display the name of the customer.</p> <p>You may enter a new Customer on-the-fly from this window. This may be accomplished by entering a Customer ID. If the Customer does not exist, you will be asked if you wish to add a new Customer record.</p>
Ship To Address Code:	This field is used for the RFQ report.
Required Date	Enter the date that you expect delivery of the items for this RFQ. This is the date that will appear on the RFQ report by the "Required Date" label.
Customer PO Number	The Customer PO Number entered here will be placed on the Quote when it is created from the RFQ Vendor window.
Buyer ID	Enter a valid Buyer ID. The Buyer PO Number entered here will be placed on the Purchase Order when it is created from the RFQ Vendor window.
Default Vendor	Enter a valid Vendor ID or choose from the list by clicking on the Looking Glass. The Default Vendor ID will be placed in the scrolling window each time an Item is entered. This value may be changed in the scrolling window for each item.

Default Markup Percent	<p>This value is used to determine price when a Quote is created. Enter a percentage value here as shown in the window above. The value entered in this field will be used to default the % field when entering line items in the scrolling window. This value may be changed in the scrolling window for each item.</p> <p>If greater than zero, the markup percentage is added to the Item Cost to determine Item price when a Quote is created. For Inventory Items, if markup = 0, Quote price will be determined by SOP pricing structure. For non inventory items, if markup = 0, Quote price will equal Item Cost.</p>
Comments	<p>Comments will appear at the bottom of the RFQ report.</p> <p>When a Purchase Order is auto-generated from this RFQ and there is a comment in any of the Comments lines, a new comment and associated comment ID will be created for the Purchase Order.</p>
Subtotal	<p>Display Only Field - The Subtotal field is the total of the all Extended Costs for each item in the scrolling window.</p>
Taxable/Exempt	<p>Visual Switch - The Tax ID switch will default to the "Default Tax ID" setup in the Purchase Order Setup window. By clicking on the switch the field will alternate from "Taxable" to "Exempt". If "Taxable" is selected the tax amount will be computed automatically using the tax percentage previously entered in the Purchase Order Setup window. If "Exempt" is selected then the field will be zero.</p>
Freight	<p>The Freight field is used to enter any shipping costs associated with the Purchase Order.</p>
Total	<p>Display Only Field - The Total field is the addition of the Subtotal, Taxable/Exempt and Freight fields.</p>

THE REQUEST FOR QUOTE ENTRY SCROLLING WINDOW

This section describes the Scrolling window within the Request For Quote Entry window.

Overview of the Request For Quote Entry Scrolling Window

The Request For Quote Entry Scrolling window is used to enter line items. There are two lines for the Scrolling window. Click on the Show/Hide button to the right of the description lines to display one or both lines for the items.

In the Request For Quote Entry Scrolling window it is easiest to enter items by tabbing from field to field in order to enter the next item. The fastest way to enter items to the scrolling window is to enter items with the Scrolling window in the Hide mode. Should you need to make a change to the Description, you would need to click the Show button to see the Description on the second line.

Buttons in the Request For Quote Entry Scrolling Window

The Copy button in the scrolling window allows you to copy the line item and all its contents to a new line. To use this feature, click on the Copy button in the line you wish to copy. The new line will be added beneath the line to copy.

Fields in the Request For Quote Entry Scrolling Window

The following is a detailed list of fields in the Request For Quote Entry Scrolling window and a complete description of their function and use:

Item Number	The Item Number matches the 'Item Number' field in Inventory Item Maintenance. To retrieve an Inventory item, you may type in the item number in the Item Number field or click the looking glass button to select an item from the Item lookup window. By entering a partial item number and then clicking the looking glass button, the Item lookup window will open with an item number selected which is closest to the number that was entered in the Item Number field. You may also enter Non Inventory items contained in the Inventory files.
Vendor ID	Enter the Vendor ID you wish to be associated with the Item for the RFQ. You may choose multiple Vendors for the same item.
Quantity	When an item is entered the Quantity will default to 1. The Quantity field is editable and the user may

	enter any quantity desired. When the Quantity field is changed the result will cause the Extended Cost, Subtotal, Tax and Total fields to be recomputed.
P	This checkbox is used for Printing. Only Checked items will print on the Request For Quote report. If you do not want the item to be printed on the Quote, uncheck this box.
U of M	When an item is entered, the U of M field will default to the Base Unit of Measure setup for the item in Inventory Item Maintenance. Non-inventory items will default to "Each". If the default U of M is not the desired unit of measure then you may retrieve a different U of M by typing in the alternate U of M or clicking on the looking glass button. Clicking the looking glass button will open the Item Price Details lookup window, from which you may select an alternate U of M.
Unit Cost	When an item is entered the Unit Cost will default to the Current Cost for an inventory item. If the item is a non-inventory item the field will contain a zero amount and you will need to enter a unit cost. If the default cost is not correct for this purchase order you may change it. When the Unit Cost field is changed the result will cause the Extended Cost, Subtotal, Tax and Total fields to be recomputed.

The following fields are only viewable when the window is expanded so the second line shows.

Description	When an item is first entered the Description will default to the description setup for the item in the Inventory Item Maintenance for an inventory item. If the item is a non-inventory item, the field will remain blank until you make an entry to the field. This is an editable field so you may change the description for display purposes on the RFQ. This does not, however, change the Inventory description in the Inventory cards.
Include PO	Defaults to checked. If you want this item included in the PO when generated, check this box , otherwise uncheck this box
Include Quote	Defaults to checked. If you want this item included in the Quote when generated, check this box, otherwise uncheck this box.

Qty in U of M	Display Only Field - The Qty in U of M displays the number of units in the unit of measure displayed above this field. For example: you may have the option of purchasing units by "Each", defined as one unit or by "Case", defined as 10 units. The Qty in U of M would then display a "1" if the U of M chosen was "Each" or it would display "10" if the U of M chosen was "Case".
Extended Cost	Display Only Field - The Extended Cost field is a computed cost of the Quantity field times the Unit Cost field.
%	This is defaulted from the Default Markup Percent which is setup on the main RFQ Entry window. This value is editable for each item.
Vendor Name	This value is retrieved from the Vendor ID.

Entering Vendor Responses

After Vendors have returned their responses, you may return to the Request For Quote Entry window to enter Unit Costs bid by the vendors. Simply click in the Unit Cost field and override the default amount by entering the new amount. The new amount will be used when Purchase Orders are created for the chosen vendors as described in the next section.

THE RFQ VENDOR WINDOW

Overview of the RFQ Vendor Window

This window is opened by clicking on the Assign Vendors button in the Request For Quote Entry window. Vendors entered in the Request For Quote Entry window (from which this window is opened) are automatically assigned. This window is used to print the RFQ and to Transfer to PO or to Quote.

The screenshot shows the 'RFQ Vendor' window with the following data:

Vendor Information for PO		Customer Information for Quote	
Vendor ID	ASSOCIAT0001	RFQ Number	RFQ00000000026
Vendor Name	Associated Insurance Inc.	Batch ID	QUOTES
PO Type	Standard	Customer ID	ALTONMAN0001
Address ID	PRIMARY	Alton Manufacturing	
Contact	Wade Tonnesson	ShipTo Address	PRIMARY
Address	12345 West Pennsylvania Ave.	Ship Method	GROUND
City	Waterville	Customer Requested Date	4/30/2008
State	ME		
ZIP Code	04901-0001		
Country	USA		
Phone 1	(800) 555-0107 Ext. 0000		
Phone 2	(212) 555-0107 Ext. 0000		
Fax	(212) 555-0107 Ext. 0000		
Payment Terms	Net 30		
Ship Method	GROUND		
FOB Point	Miami		
Required Date	12/30/2007		

Buttons in the RFQ Vendor Window

- | | |
|------------------|--|
| Save button | Click on this button to save window information. |
| Delete button | Click on this button to delete the current Purchase Order record. |
| Print RFQ button | Click on this button to print the RFQ for the selected Vendor. Only items with the Print (P) value set to Y in the RFQ Entry window will be shown on the RFQ report. |

Transfer to PO button	Click on this button to produce a Great Plains Purchase Order for the selected Vendor. Only items for the selected Vendor will be entered as line items in the new Purchase Order. Only items for which Vendor Item Numbers have been created will be entered as line items in the new Purchase Order. Only items with the Include PO value set to Y in the RFQ Entry window will be included in the new Purchase Order.
Transfer to Quote button	Click on this button to produce a Great Plains Sales Order Quote for the selected Customer. Only items with the Include Qte value set to Y in the RFQ Entry window will be included in the new Sales Order Quote.
Vendor ID Looking Glass button	Click on this button to choose a Vendor previously entered in the Vendor Cards.
Quote Batch ID Looking Glass button	Click on this button to choose a Batch ID previously entered via Sales Batch Entry.
Address ID Looking Glass button	Click on this button to choose a Vendor Address Code.
Internet Addresses (i) icon	Refer to section "Emailing from the RFQ Vendor Window" for more information.
Payment Terms Looking Glass button	Click on this button to choose Payment Terms previously set up in Great Plains.
Ship Method Looking Glass button	Click on this button to choose a Shipping Method previously set up in Great Plains.

Fields in the RFQ Vendor Window

The following is a detailed list of fields in the RFQ Vendor window and a complete description of their function and use RFQ Number.

The RFQ Number is brought forward from the RFQ Entry window.

Vendor Information for PO:

RFQ Number	The RFQ Number is brought forward from the RFQ Entry window.
Vendor ID	<p>Vendors assigned to the RFQ shown in the RFQ Number field to the right.</p> <p>Multiple vendors may be assigned. After choosing a Vendor, click on the Save button the assign the vendor to the RFQ.</p> <p>The browse buttons to the right of the Vendor ID field may be used to view which vendors have been assigned to the RFQ.</p>
Vendor Name	Defaulted from Vendor ID.
PO Type	<p>PO Type will default to Standard when the window opens.</p> <p>You may choose Standard or Drop-Ship from the drop-down list.</p>
Address ID	Enter the code for the Vendor Address you wish to be printed on the RFQ. The Display Only address information fields below and to the right of the Address ID are filled from the Vendor Address Code information in Great Plains.
Contact	This value is defaulted from Vendor Address ID chosen above.
Address	This value is defaulted from Vendor Address ID chosen above.
City	This value is defaulted from Vendor Address ID chosen above.
State	This value is defaulted from Vendor Address ID chosen above.
Zip Code	This value is defaulted from Vendor Address ID chosen above.
Country	This value is defaulted from Vendor Address ID chosen above.
Phone 1	This value is defaulted from Vendor Address ID chosen above.
Phone 2	This value is defaulted from Vendor Address ID chosen above.
Fax	This value is defaulted from Vendor Address ID chosen above.
Payment Terms	The default value is brought forward from the

	RFQ Entry window. It may be changed here. This value is used for the RFQ report.
Ship Method	The default value is brought forward from the RFQ Entry window. It may be changed here. This value is used for the RFQ report.
FOB Point	The default value is brought forward from the RFQ Entry window. It may be changed here. This value is used for the RFQ report.
Required Date	This value is brought forward from the RFQ Entry window. It may be changed here. This value is used for the RFQ report.

Customer Information for Quote:

Batch ID	Enter a Sales Batch ID. New SOP Quotes created from this window will be assigned to this Sales Batch ID.
Customer ID	This value is brought forward from the RFQ Entry window if a default customer ID was entered.
Customer Name	Defaults from Customer ID.
Ship To Address	Defaults to Customer's Primary Ship To Address Code. This value may be changed here.
Ship Method	Defaults from Customer's Shipping Method based on Ship To Address. This value may be changed here.
Customer Requested Date	Enter date requested by the customer.

THE REQUEST FOR QUOTE REPORT

Below is a sample RFQ. This report may be printed by clicking on the Print RFQ Button in the RFQ Vendor window. This report may be modified to suit your needs.

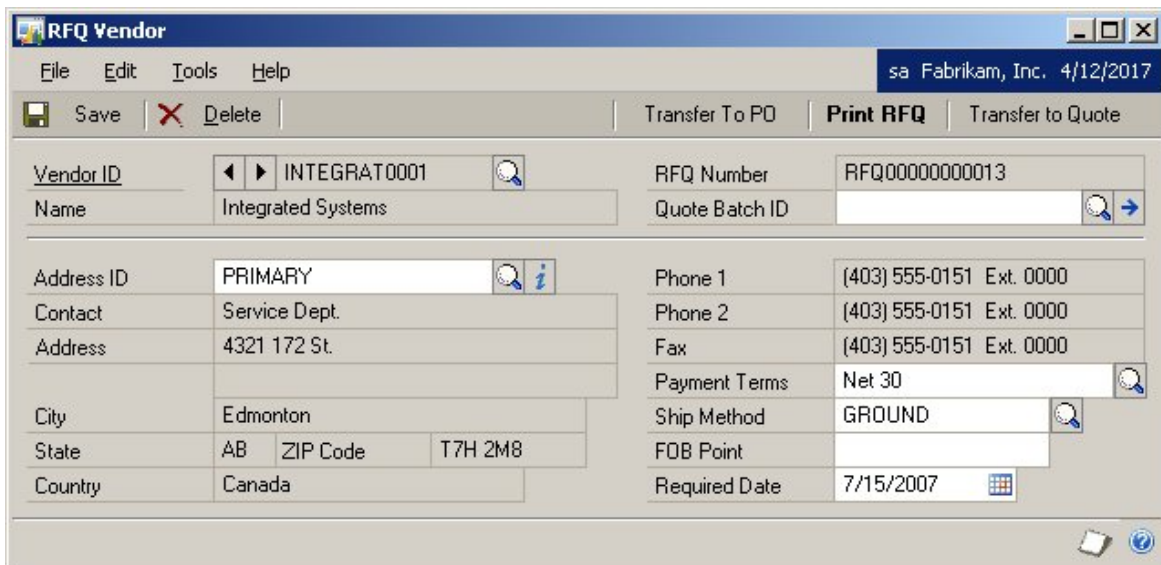
The World Online, Inc. 4277 West Oak Parkway Suite 32 Chicago, IL 60601-4277 United States (312)436-2671 * fax (312)436-2896		Price Request		Page 1
Bill To: The World Online, Inc. 4277 West Oak Parkway Suite 32 Chicago, IL 60601-4277 United States		Request No. RFQ00001 Request Date 0/0/00 Requested By lessonuser2 FOB		
Vendor: Integrated Systems 4049 172 St. Edmonton, AB T7H 2M8		Ship To: TWO, Inc. Warehouse 4300 West Elm St. Chicago, IL 60601-4300 United States		
		Vendor Contact Service Dept. Phone (403) 483-9187 Ext. 0000 FAX (403) 483-4887 Ext. 0000 Terms Net 30 Ship Method UPS GROUND		
Qty 2.00	Vendor Item Number INTEGRAT0001	Unit Each	Unit Cost	Extended Cost
	Description Control Panel			

CREATING RFQ PDF DOCUMENTS FROM RFQ REPORTS

This section describes the steps to be followed in order to export an RFQ report to a PDF Document. This document describes an example of the report that is printed from the RFQ Vendor window. However, this procedure can be used for exporting any report in Dynamics to a PDF Document.

Note: Before you perform this procedure you must have Adobe Acrobat PDFWriter print driver or Acrobat Distiller installed, which allows creating PDF Documents.

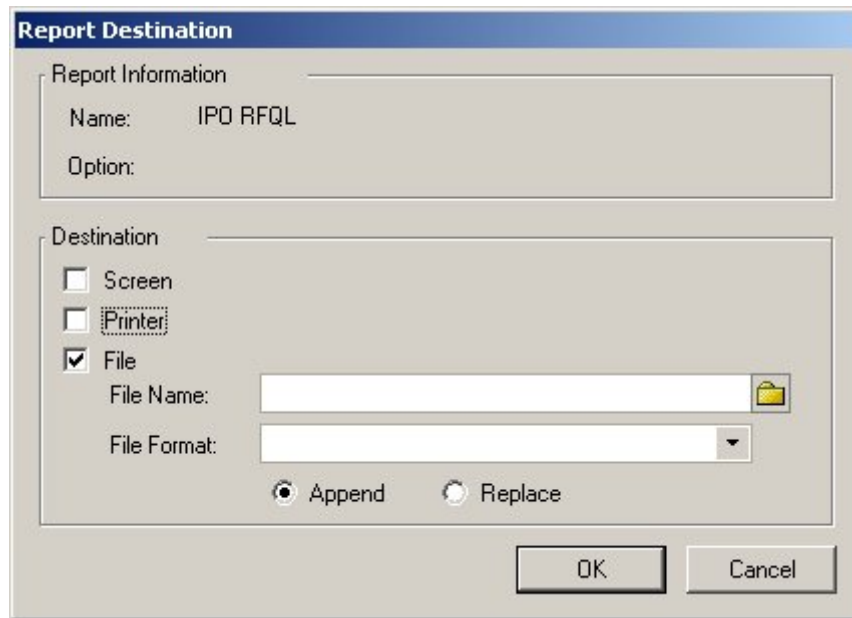
1. Select the required RFQ in the RFQ Entry window. Click on Assign Vendors to open the RFQ Vendor window. This window has a "Print RFQ" button as shown in the picture below.



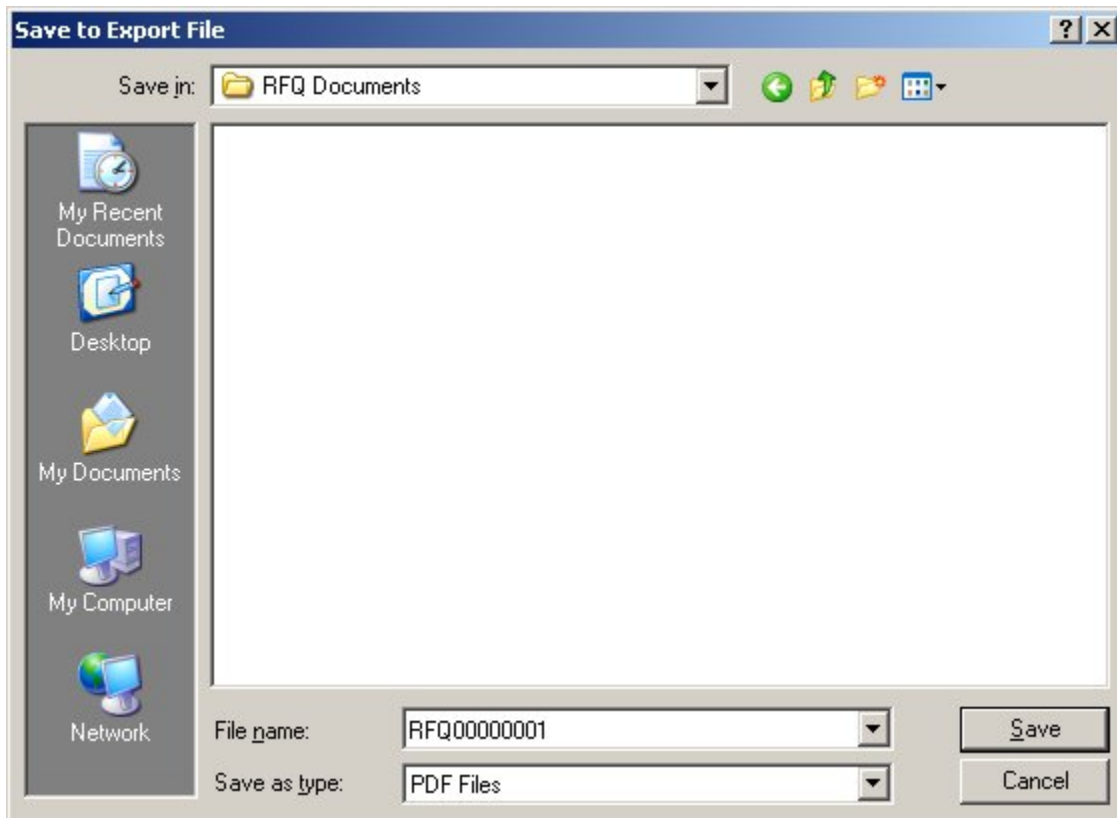
The screenshot shows the 'RFQ Vendor' window with the following data:

Field	Value
Vendor ID	INTEGRAT0001
Name	Integrated Systems
RFQ Number	RFQ00000000013
Quote Batch ID	
Address ID	PRIMARY
Contact	Service Dept.
Address	4321 172 St.
City	Edmonton
State	AB
ZIP Code	T7H 2M8
Country	Canada
Phone 1	(403) 555-0151 Ext. 0000
Phone 2	(403) 555-0151 Ext. 0000
Fax	(403) 555-0151 Ext. 0000
Payment Terms	Net 30
Ship Method	GROUND
FDB Point	
Required Date	7/15/2007

2. Click on the Print RFQ button. This will open the Report Destination window. Check the "File" checkbox.

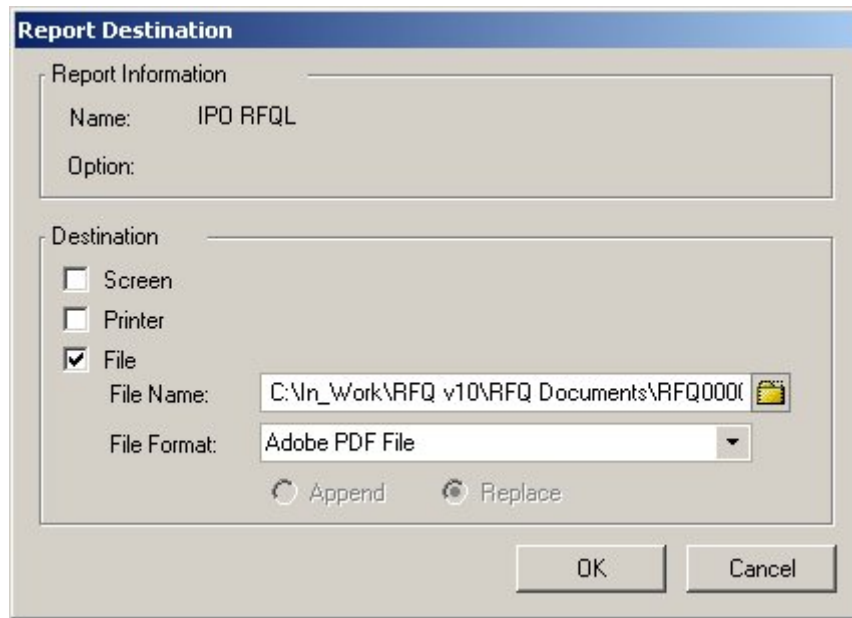


3. Then click on the folder icon to browse to the location where you wish to save the PDF document.



4. After choosing the desired location, make sure you select "PDF Files" in the "Save as type:" drop down list. Give a suitable name for the PDF Document and click on Save as shown in the picture above.

- This will return you to the Report Destination window. In this window, you can see the File Format field has already been updated with the "Adobe PDF File" as shown below:



- Before you click OK, make sure the File Format has the selection "Adobe PDF File" and the File Name has an extension of .pdf. Click OK. A PDF file will be created at the selected location.

EMAILING FROM THE RFQ VENDOR WINDOW

This section describes the email functionality which can be used to email the RFQ Documents to the desired vendor, salesperson etc. This is done from the RFQ Vendor window.

Initial Setup:

Enter email addresses for all desired vendors in the Internet Information window. This window can be opened from the Vendor Maintenance window. To do this, click the Internet Addresses (i) icon next to the Address ID field on the Vendor Maintenance window (Cards->Purchasing->Vendor). In the Internet Information window, enter the string [MAILTO:](mailto:) and then append the email address for the E-mail field. Click Save to save your changes. Fill in the email addresses as explained above for all desired vendors.

The workstation from which you wish to send emails must locally have an email system with MAPI (Microsoft Application Program Interface) enabled.

The screenshot shows the 'RFQ Vendor' window for 'sa Fabrikam, Inc. 7/9/2007'. The window contains the following fields:

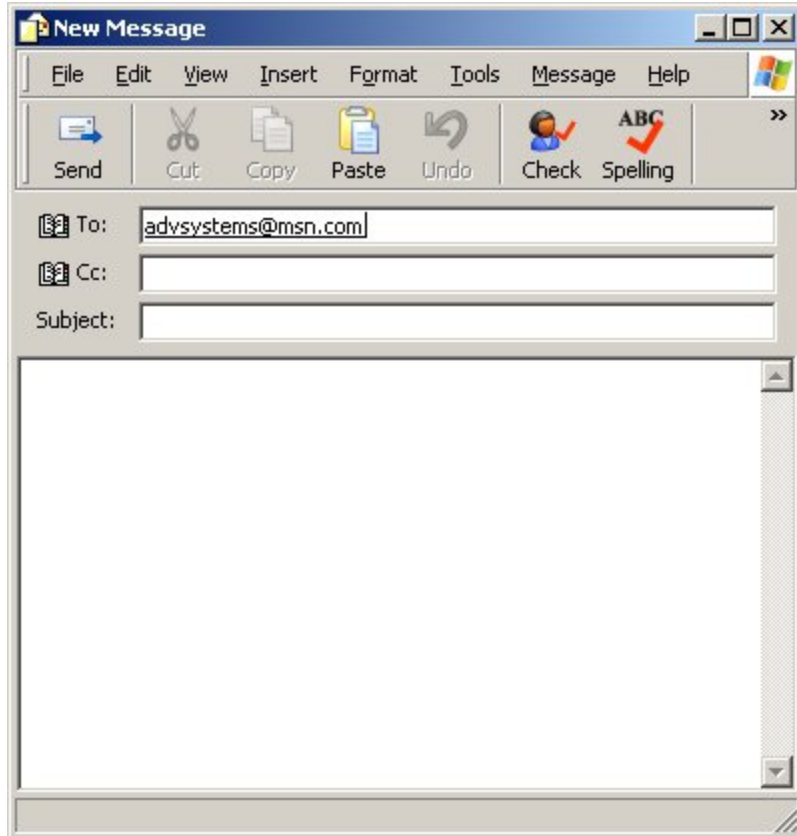
Vendor ID	INTEGRAT0001	RFQ Number	RFQ000000000013
Name	Integrated Systems	Quote Batch ID	
Address ID	PRIMARY	Phone 1	(403) 555-0151 Ext. 0000
Contact	Service Dept.	Phone 2	(403) 555-0151 Ext. 0000
Address	4321 172 St.	Fax	(403) 555-0151 Ext. 0000
City	Edmonton	Payment Terms	Net 30
State	AB	Ship Method	GROUND
ZIP Code	T7H 2M8	FOB Point	
Country	Canada	Required Date	7/15/2007

Click on the Internet Addresses icon (i), which is next to the "Address ID" field on the RFQ Vendor window. This will open the Internet Information window with the Vendor ID and the Address ID defaulted to be the same as what is displayed on the RFQ Vendor window, as shown below:

The screenshot shows the 'Internet Information' dialog box in Microsoft Access. The window title is 'Internet Information' and the status bar shows 'sa Fabrikam, Inc. 4/12/2017'. The menu bar includes File, Edit, Tools, and Help. The toolbar has Save, Clear, and Delete buttons. A dropdown menu 'Select Information for:' is set to 'Vendors'. Below this, there are two rows of fields: 'Vendor ID' with the value 'INTEGRAT0001' and a search icon, and 'Address ID' with the value 'PRIMARY' and a search icon. The main area is titled 'Internet Information' and contains several fields: 'E-mail' with the value 'MAILTO:integrated@aol.com', 'Home Page' with a vertical bar, 'FTP Site', 'Image', 'Login', 'Password', 'User Defined 1', and 'User Defined 2'. At the bottom, there is an 'Additional Information' section with a large empty text area and a scroll bar. The bottom status bar has navigation arrows and a help icon.

If you have already setup email addresses for all the vendors, this window will already show the email address. You can change the email address, but make sure that the string "[MAILTO:](#)" is present in front of the email address. You can choose different categories such as customers, sales persons, etc. in the "Select Information for" drop down list. You can also choose different Address IDs and set up email addresses for each one.

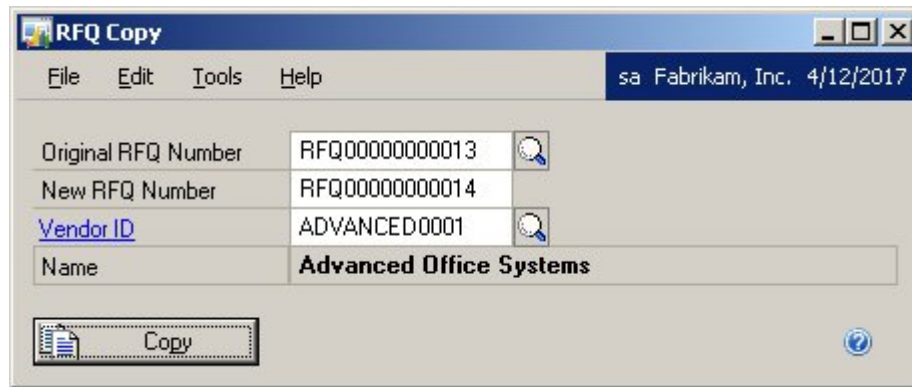
Click on the E-mail hyperlink. If any MAPI enabled email client is present on the workstation, an email window will open as shown below.



You can fill the subject and the body of the email and also attach the RFQ PDF Documents, which can be created as explained in the previous section [Creating RFQ PDF Documents from RFQ Reports]. When you are ready, you can click on the Send button to send the email.

THE RFQ COPY WINDOW

This window is used to automatically create a new RFQ by copying RFQ information from an existing RFQ. The new RFQ can then be edited or viewed in the Request For Quote Entry window.



Buttons in the RFQ Copy Window

This can be accessed from the menu:



Transactions >> Purchasing >> Request for Quote Copy

The Request For Quote Copy window contains the following buttons:

Original RFQ Number Looking Glass	Click on the button to choose the RFQ from which you wish to copy information to the new RFQ.
Vendor ID Looking Glass	Click on this button to choose a Vendor previously entered in the Vendor Cards.

Fields in the RFQ Copy Window

The following is a detailed list of fields in the RFQ Vendor window and a complete description of their function and use:

Original RFQ Number	This represents the RFQ from which you wish to copy information to the new RFQ.
New RFQ Number	This number is automatically created after you tab off the Original RFQ Number. If you do not wish to use this number, you may replace it.

Vendor ID


Vendor ID to be assigned to the new RFQ.

This Vendor will be assigned to all items in the new RFQ.

If this field is left blank, the Vendor ID field will be left blank in the new RFQ. Vendors may then be assigned to the new RFQ after it has been created.

THE RFQ REPORTS WINDOW

This can be accessed from the menu:

 Reports >> Purchasing >> Request for Quote Reports



Buttons in the RFQ Reports Window

RFQ Links by Date	Click on this button to print the report for the selected data range. This report provides a list of Sales Quotes by SOP Number and Purchase Orders by PO Number which have been auto-created by the RFQ program.
Vendor Compare by Item Number	Click on this button to print the report for the selected data range and item number. This report provides a list of Vendors by Item Number to show amount bid by each Vendor.

Fields in the RFQ Reports Window

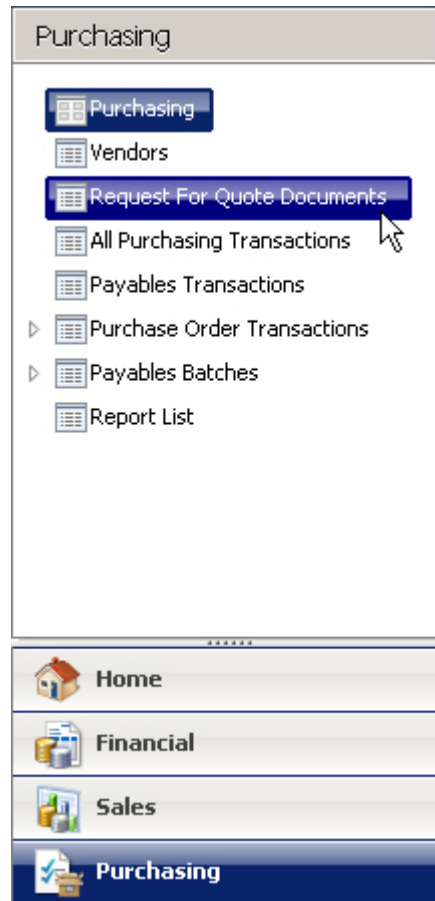
Enter Start Date	Enter start of date range. You can use the calendar button to select a date.
End Date	Enter end of date range. You can use the calendar button to select a date.
Enter Item Number	Enter Item Number for compare list.

THE REQUEST FOR QUOTE DOCUMENTS LIST

Lists allow you to view a list of similar records, select one or more records and then perform actions against all of the records that you selected at the same time.

To learn more about the Lists feature and its usage refer to the Microsoft Dynamics GP Help Document >> Chapter "Using the system" >> "The Basics" >> "Lists".

This list "Request for Quote Documents" can be accessed by clicking on the Purchasing category in the navigation pane as shown below.



Click on the "Request for Quote Documents" list to open the list view. See the picture of the list below. Use the "Restrictions" pane to select a date criteria for filtering the data. To view all the RFQ Documents choose Custom Date selection and check the boxes "No Start Date" and "No End Date". This will list all the RFQ Documents in the system. You can also choose any other selection in the Restrictions Category. In the picture below, the Custom Date was used to display the data.

Request for Quote Documents (read only) ▾ → Hide Options ⌵

Show results

+ Add Filter ▾

<input type="checkbox"/>	RFQ Number ▲	RFQ Date	Customer Number	Required Date	Customer PO Number	Total Amount
<input checked="" type="checkbox"/>	RFQ000000000001	7/13/2007	AARONFIT0001	6/1/2007	PO8745545	\$3,375.00
<input type="checkbox"/>	RFQ000000000010	7/13/2007	ADAMPARK0001	7/21/2007	PO786466578	\$926.90
<input type="checkbox"/>	RFQ000000000013	7/9/2007	ADVANCED0001	7/15/2007	PO977676767	\$5,950.00

1 of 3 records selected.

[RFQ000000000001 : 7/13/2007](#)

RFQ Number : RFQ000000000001 Buyer ID : TERRYADAMS Tax Amount : 0.00000
 Ship to Address Code : WAREHOUSE Subtotal : 3375.00000 Freight : 0.00000

Line Seq Number	Item Number	Item Description	Vendor ID	Quantity	U Of M	Unit Cost	Extended Cost
16,384.00	1-A3261A	Multi-Core Processor	AMERICAN0001	10	Each	\$450.00	\$4,500.00
32,768.00	1-A3483A	SIMM EDO 72	AMERICAN0001	5	Each	\$200.00	\$1,000.00

All the standard features of lists have been implemented in this list as shown above. They are:

- a) Displaying data based on Date Restrictions: Every time you change the Restrictions to a new date criteria refresh the list view for updates information by clicking on Refresh menu item in the "Request for Quote Documents (Read only)" drop down list as shown below:

Request for Quote Documents (read only) ▾ → More Options ⌵

- Save As... Ctrl+Shift+S
- Show/Hide ▸
- Add to Navigation Pane as Shortcut
- Add to Home Page
- Remove Personalizations
- Refresh Ctrl+R

Customer Number	Required Date	Customer PO Number	Total Amount
AARONFIT0001	6/1/2007	PO8745545	\$3,375.00
ADAMPARK0001	7/21/2007	PO786466578	\$926.90
ADVANCED0001	7/15/2007	PO977676767	\$5,950.00

- b) Filtering data: To use this feature click on the More Options selection to the far right and then click on the Add Filter addition symbol to add a filter for the data, as shown below:

Request for Quote Documents (read only) ▾ → Hide Options ⌵

Show results

+ Add Filter ▾

- c) Reports Pane: Use the "Print this list" feature to print a report.
- d) Go To Pane: Use the "Send to Excel" feature to export data to an Excel document.
- e) Actions Pane: This pane contains the items "Update RFQ" and "Import from Excel".

"Update RFQ": When a single row is selected in the list, this option is enabled. By clicking on this item, the "Request for Quote Entry" window opens with the selected RFQ document already opened in the window for viewing or editing.

"Import from Excel": When a single row is selected in the list, this option is enabled. This action enables the user to import data from an Excel document to the RFQ Lines tables.

IMPORTANT: You can import only from documents which have been previously exported using the List as explained in section "Exporting and Importing RFQ Lines data to Excel".

f) Information Pane: This pane displays additional details and the line items for the selected RFQ Document, as shown below:

<input type="checkbox"/>	RFQ Number ▲	RFQ Date	Customer Number	Required Date	Customer PO Number	Total Amount
<input checked="" type="checkbox"/>	RFQ000000000001	7/13/2007	AARONFIT0001	6/1/2007	PO8745545	\$3,375.00
<input type="checkbox"/>	RFQ000000000010	7/13/2007	ADAMPARK0001	7/21/2007	PO786466578	\$926.90
<input type="checkbox"/>	RFQ000000000013	7/9/2007	ADVANCED0001	7/15/2007	PO977676767	\$5,950.00

1 of 3 records selected.

[RFQ000000000001 : 7/13/2007](#)

RFQ Number :	RFQ000000000001	Buyer ID :	TERRYADAMS	Tax Amount :	0.00000
Ship to Address Code :	WAREHOUSE	Subtotal :	3375.00000	Freight :	0.00000

Line Seq Number	Item Number	Item Description	Vendor ID	Quantity	U Of M	Unit Cost	Extended Cost
16,384.00	1-A3261A	Multi-Core Processor	AMERICAN0001	10	Each	\$450.00	\$4,500.00
32,768.00	1-A3483A	SIMM EDO 72	AMERICAN0001	5	Each	\$200.00	\$1,000.00

EXPORTING AND IMPORTING RFQ LINES DATA TO EXCEL

Using the list feature, the user can export RFQ Lines information to an Excel document. After updates are made to the Excel document, the data can be imported back from the Excel file to the RFQ Lines table.

Exporting RFQ Lines information from the Information Pane to Excel:

Line Seq Number	Item Number	Vendor ID	Quantity	U Of M	Unit Cost	Extended Cost
16,384.00	1-A3261A	AMERICAN0001	10	Each	\$7.00	\$70.00
32,768.00	1-A3261A	AMERICAN0001	10	Each	\$7.00	\$70.00
49,152.00	NON-IV	AMERICAN0001	1	Each	\$20.00	\$20.00
49,664.00	NON-IV	AMERICAN0001	1	Each	\$20.00	\$20.00

RFQ Number :	RFQ000000000001	Buyer ID :	TERRYADAMS	Tax Amount :	107.55000
Ship to Address Code :	WAREHOUSE	Subtotal :	3585.00000	Freight :	0.00000

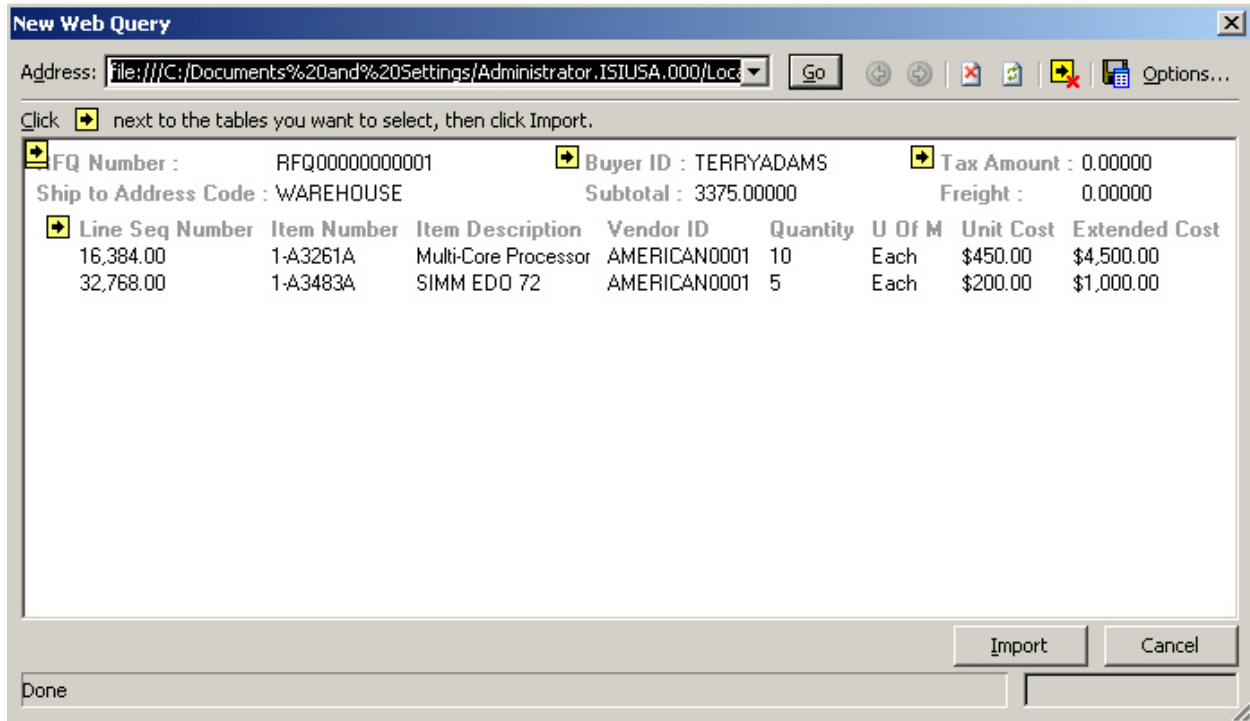
Vendor ID	Quantity	U Of M	Unit Cost	Extended Cost
AMERICAN0001	10	Each	\$7.00	\$70.00
AMERICAN0001	10	Each	\$7.00	\$70.00
AMERICAN0001	1	Each	\$20.00	\$20.00
AMERICAN0001	1	Each	\$20.00	\$20.00

Paste
Create Shortcut
Add to Favorites...
View Source
Encoding ▶
Print
Refresh
Export to Microsoft Excel
Properties

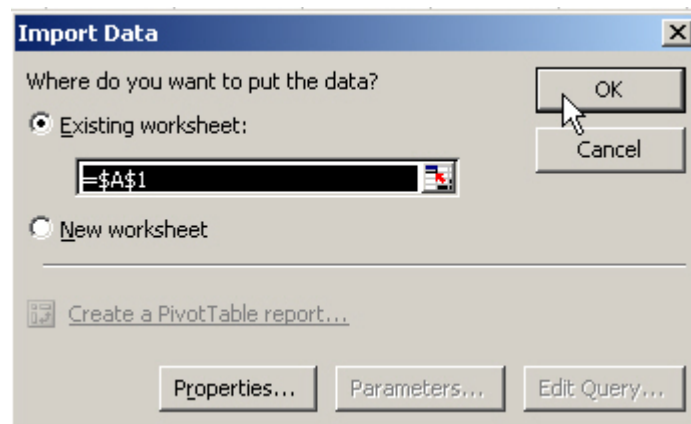
The Information pane is the area which is present below the main list. This contains the information about the lines for the RFQ document selected in the main list. To export this line information to an excel file, place the mouse cursor anywhere below all the data displayed in the Information pane, and right click to display the menu.

Important Note: Please place the mouse cursor well below all the lines information and then right click as shown in the picture above.

Select the item "Export to Microsoft Excel" from the menu which appears. This opens Excel and displays a "New Web Query" window as shown below. If you do not see the "New Web Query" window, then please repeat the above steps by right clicking below the data in the Information Pane and selecting "Export to Microsoft Excel" from the pop-up menu.



Click on Import and another message appears asking where the data needs to be imported. You can select the default selection or choose a new worksheet to import the data and click on OK.

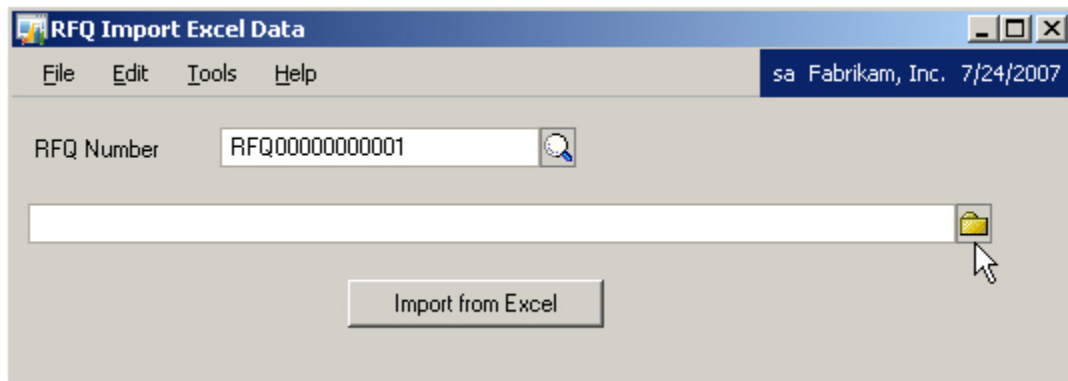


All the data from the Information pane is imported to an Excel file. The users can now modify the data in the Excel file. Only changes made to the following fields are saved back when importing data (explained in the next section) back to the RFQ Lines table: "Unit Cost" and Extended Cost".

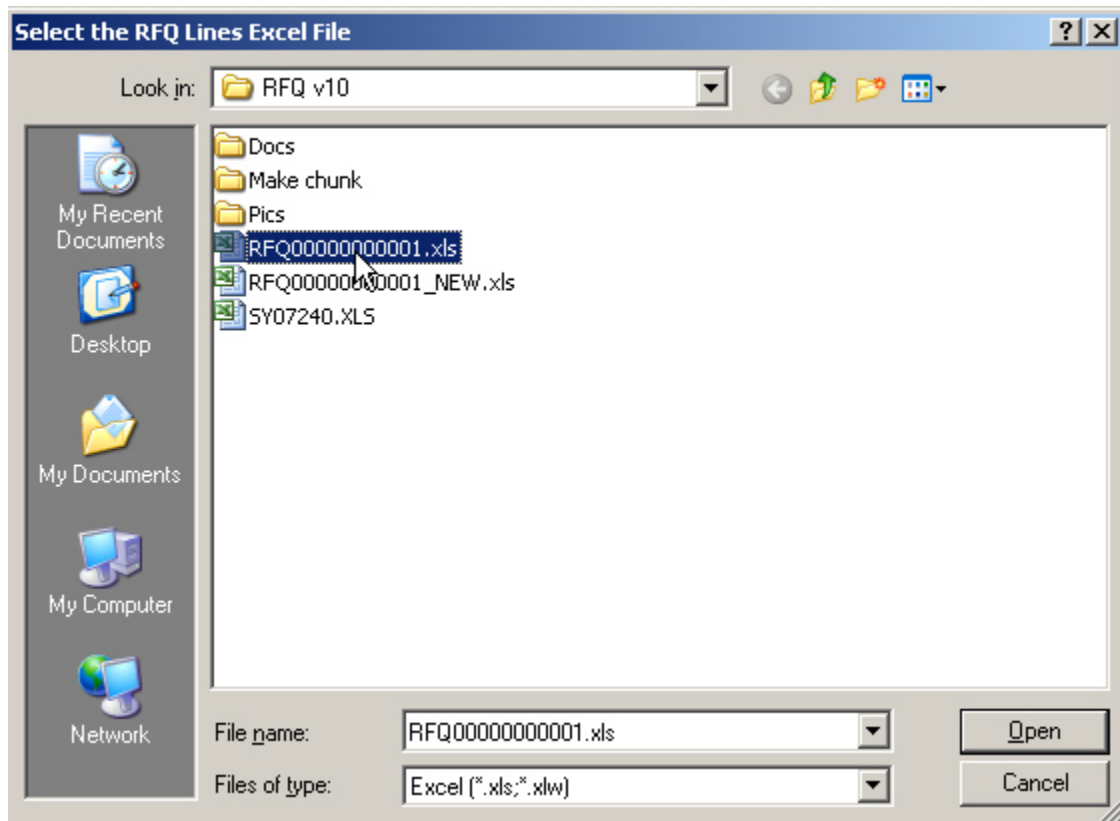
Importing data from Excel to the RFQ Lines Table:

When you wish to import data back from the Excel file to the RFQ lines table, use the button "Import from Excel" in the Actions Pane.

First select an RFQ Document from the list and click on "Import from Excel" button in the Actions Pane.



This opens the “RFQ Import Excel Data” window as shown above, with the RFQ Number field filled in, corresponding to the document selected in the list. Click on the browse icon to select the Excel document that corresponds to the RFQ Number and click on Open.



The complete path and the name of the Excel document appears in the path field on the window. Click on the “Import from Excel” button. This imports the data from the selected Excel document and updates the RFQ Lines table with the information. Note that only changes made to the fields “Unit Cost” and “Extended Cost” are brought into the Lines table during import.

To view the updated data in the Information Pane, refresh the list view by selecting the Refresh option from the drop down list next to “Request for Quote Documents” title or by clicking the key combination: Ctrl + R.

HOW TO UNINSTALL THE REQUEST FOR QUOTE PRODUCT

To uninstall the product, you must remove the product from Dynamics.set. The Dynamics.set file can be found in the Dynamics directory. Below is a sample of a typical Dynamics.set file. Products in this file depend on which products you have installed with Great Plains.

```
File Edit Format View Help
8
0
Great Plains
3104
Advanced Security
1632
Cash Flow Management
1045
Revenue Expense Deferrals
1493
SmartList
3278
Report Scheduler
1878
Excel-Based Budgeting
1960
Request For Quote
Windows
:C:\Dynamics\Dynamics.dic
:C:\Dynamics\Forms.dic
:C:\Dynamics\Reports.dic
:C:\Dynamics\ADVSECUR.DIC
:C:\Dynamics\ADVS_FRM.DIC
:C:\Dynamics\ADVS_RPT.DIC
:C:\Dynamics\CFM.DIC
:C:\Dynamics\CFMFORM.DIC
:C:\Dynamics\CFMRPTS.DIC
:C:\Dynamics\D1045.DIC
:C:\Dynamics\F1045.DIC
:C:\Dynamics\R1045.DIC
:C:\Dynamics\EXP1493.DIC
:C:\Dynamics\EXP1493F.DIC
:C:\Dynamics\EXP1493R.DIC
:C:\Dynamics\RPTSCHED.DIC
:C:\Dynamics\F3278.DIC
:C:\Dynamics\R3278.DIC
:C:\Dynamics\XLBUDGET.DIC
:C:\Dynamics\XL1878F.DIC
:C:\Dynamics\XL1878R.DIC
:C:\Dynamics\RFQ.DIC
:C:\Dynamics\RFQFORMS.DIC
:C:\Dynamics\RFQREPTS.DIC
```

The Uninstall Procedure

1. Make a backup copy of Dynamics.set which can be copied back in case you make a mistake.
2. Open Dynamics.set with Notepad.

3. The first line of the file is the number of products installed. Change this to one less than the current total. In this case you would change 8 to 7.
 4. Each product installed has two lines consisting of the Product ID followed by the name of the product. The Product ID of Request For Quote is 1960. Find Product ID 1960 and remove the lines containing 1960 and Request For Quote.
 5. The next section following "Windows" contains sets of 3 lines for each product which contain the paths to the products dictionaries. The RFQ product dictionaries are RFQ.DIC, RFQFORMS.DIC AND RFQREPTS.DIC. Find set of lines and remove them from the file.
 6. Save Dynamics.set.
 7. Next, find the RFQ dictionary (RFQ.DIC) in your Dynamics folder and remove it.
 8. The final step to remove all traces of RFQ would be to remove the RFQ tables and associated stored procedures from your SQL database.
- Steps 7 and 8 are not necessary. If you want to remove RFQ temporarily, you should skip steps 7 and 8 and save your old copy of Dynamics.set.

REQUEST FOR QUOTE TABLES

DescriptionTable	Names
RFQ Setup	SQL Server\yourcompany)\Tables\IP40000 SQL Server \yourcompany)\Stored Procedures\ zDP_IP40000*(dbo)
RFQ Setup Addresses	SQL Server \yourcompany)\Tables\IP40100 SQL Server \yourcompany)\Stored Procedures\ zDP_IP40100*(dbo)
RFQ Entry Header RFQ Entry Lines	SQL Server \yourcompany)\Tables\ IPQ20101 SQL Server \yourcompany)\Stored Procedures\ zDP_IPQ20101*(dbo) AND SQL Server \yourcompany)\Tables\ IPQ20102 SQL Server \yourcompany)\Stored Procedures\ zDP_IPQ20102*(dbo)
RFQ Vendors	SQL Server \yourcompany)\Tables\ IPQ20103 SQL Server \yourcompany)\Stored Procedures\ zDP_IPQ20103*(dbo)
RFQ Reports	SQL Server \yourcompany)\Tables\ IPQLinks SQL Server \yourcompany)\Stored Procedures\ zDP_IPQLinks*(dbo)

* All Stored Procedures begin with "zDP_" followed by the Table physical name followed by an additional identifier for each stored procedure.