



B2B Tendering Module on Navision

Overview:

Organizations that rely on Institution business or businesses where tenders or notifications are floated require to capture information about such opportunities. Typically organizations that participate in tendering, which includes technical and commercial bids, need to record all the transactions & preparing check list of all the documents. The business involving tenders necessitates meeting deadlines and analysis at various hierarchies for approvals.

Commercials form an important part of tendering where all the transactions related to tender document amount, EMD, Security deposit and the Bank Guarantee or Fixed Deposits details have to be recorded and followed up.

B2B Tendering Module helps organizations to capture the details about new tenders, prepare check list, and document the commercial transactions.

Key Features of the module:

1. Creation Of Tender Document

The screenshot displays the Microsoft Dynamics NAV Tendering module interface. The left-hand navigation pane shows a tree structure with 'Tenders' expanded, containing 'Tender', 'Bank Guarantee', and 'Tender Competitor's Details'. Below this, a list of modules is visible: Tendering (highlighted with a star), Subcontracting, Administration, Shortcuts, Quality Control, Reports, Plant Maintenance, Projects - RFES, Projects - ESD, Projects - Shelters, Logistics & Dispatch, and Sales Projects.

The main window is titled 'Tendering' and contains a 'General' tab. The 'General' tab is divided into two sections. The top section contains fields for Tender No. (TEND0001), Tender Description (Airtel tender for 100 towers), Customer No. (20000), Customer Name (Selangorian Ltd.), Customer Tender No. (1002), Tender Source (News Paper), Tender Source Name (Times of India), Tender Source Date (08/04/08), Tender Dated (08/30/08), Tender Application No. (41578258741), Tender Application Am... (0.00), Tender doc Issue From (08/30/08), Tender doc Issue To (09/15/08), and Supporting Tender (unchecked).

The bottom section is a table with the following columns: No., Description, UOM, Quantity, Unit Cost, Production Bom No., Total Amount, Estimated Unit Cost, and Estimated Total Cost. The first row contains the following data: No. (TEST TOWER), Description (Test Tower), UOM (NOS), Quantity (100.00), Unit Cost (50,000.00), Production Bom No. (TEST-2), Total Amount (5,000,000.00), Estimated Unit Cost (0.00), and Estimated Total Cost (0.00).

At the bottom of the window, there are buttons for 'Tender', 'Line', 'Make To', 'Functions', and 'Help'.

Key Features of the module:

2. Tracking of tender application amount

The screenshot displays the 'Tendering' module interface. The left sidebar contains a tree view with 'Tenders' expanded, showing 'Tender', 'Bank Guarantee', and 'Tender Competitor's Details'. The main window has tabs for 'General', 'Customer', 'Bid Details', 'EMD', 'Security Deposit', and 'Details'. The 'EMD' tab is active, showing fields for EMD Amount (500,000.00), EMD Payment Date, EMD Received Date (12/30/08), EMD Requested Date (12/15/08), EMD Required Date (01/12/09), EMD Paid Amount (0.00), EMD Received Amount (0.00), and EMD Adjusted Amount (0.00). Below these fields is a table with columns: Type, No., Description, UOM, Quantity, Unit Cost, Production Bom No., Total Amount, Estimated Unit Cost, and Estimated * Cost. The first row shows 'Item TEST TOWER Test Tower NOS 100.00 50,000.00 TEST-2 5,000,000.00 0.00'. At the bottom, there are dropdown menus for 'Tender', 'Line', 'Make To', 'Functions', and 'Help'.

3. Tracking of competitor details

This screenshot is identical to the previous one, but with a context menu open over the 'Tender Competitor's Details' option in the left sidebar. The context menu includes options: List, Comments, Ledger Entries, Tender Posting Lines, Check List, Design Check List, and 'Tender Competitor's Details' (which is highlighted). The rest of the interface remains the same.

Key Features of the module:

4. Check list for submission of tender documents.
5. Provision to design a check list for item (product) specifications.
6. Conversion of tenders to sales orders
7. Tender scheduling.
8. Updating of tender bid details.
9. Integration of tender document with the related expenses documents on tendering.
10. Tracking of EMD details
 - Paid
 - Received
 - Adjusted
11. EMD recovery accounting and management
 - Adjustment from EMD
 - Adjustment from running bills
 - Security deposit paid and received
12. EMD recovery accounting and management
 - Bank guarantee purchase
 - Bank guarantee receipt
 - Bank guarantee closing
13. Security deposit accounting and management
14. Security deposit accounting and management
 - FDR purchase
 - FDR receipt
 - FDR closing

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