



USER GUIDE



Microsoft Dynamics NAV

LOCAL ITEM PURCHASING



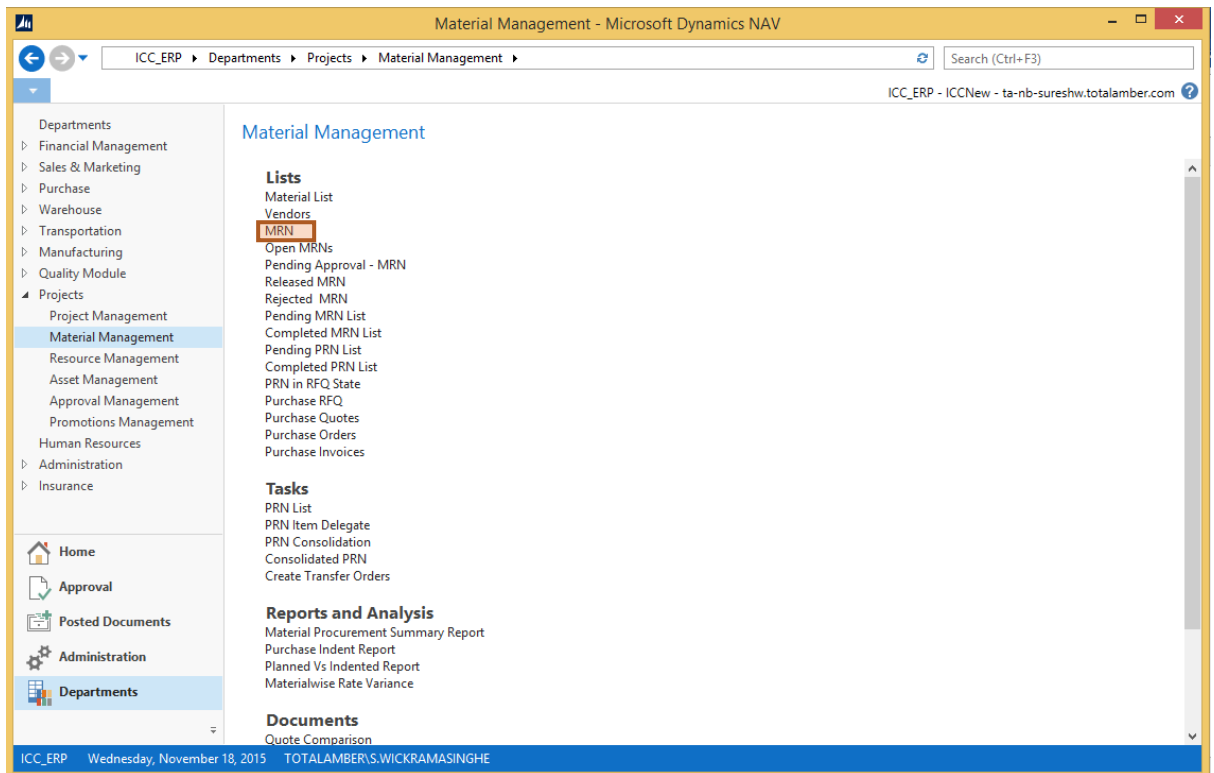
Table of Contents

1.1	MRN Process.....	1
1.2	Create MRN.....	1
1.3	Sending MRN for Approval.....	3
1.4	Approving MRN	4
1.5	Verifying the MRN	6
1.6	Creating Purchase Requisition Note (PRN).....	8
1.7	Suppliers Availability Check	9
1.8	Create Purchase Order from PRN	10
1.9	Opening Created Purchase Order	12
1.10	Sending Purchase Order for Approval	13

1.1 MRN Process

1.2 Create MRN

1. Navigate to Departments -> Projects -> Material Management -> MRN.



2. Click "New"

The screenshot shows a web application window titled "New - Material Requisition Note - Purchase Indent". The interface includes a navigation bar with tabs for HOME, ACTIONS, and NAVIGATE. Below the navigation bar is a toolbar with icons for actions like Verified, View, New, Delete, Get From MPS, Create PRN, MRN Drill Down, OneNote, Notes, Links, Refresh, Clear Filter, and Page navigation. The main content area is titled "Purchase Indent" and contains a "General" section with the following fields:

- Requisition No. (text input)
- Manual MRN No. (text input)
- Project No. (dropdown)
- Project Name (text input)
- Request By (text input)
- Requisition Date (text input)
- Requisition Time (text input)
- Status (dropdown, set to "Open")
- Sbu Code (dropdown)
- Projects Code (dropdown)
- Project Code Name (text input)
- Expected Date (dropdown)
- Request Location Code (dropdown)
- Requested Location Name (text input)
- Supply Location (dropdown)
- Supply Location Name (text input)
- Remark (text input)
- Delivery Location (dropdown)
- Delivery Location Name (text input)
- Approved User (text input)
- MRN Approved Date and Time (text input)
- Verification Status (dropdown, set to "Open")
- Priority (dropdown, set to "Low")

Below the General section is an "Upload Image" section with a note: "Right-click the image for options." and a "Show more fields" button. To the right of the General section is an "Indented Qty Fact Box" with the following data:

No:	
Budgeted Qty:	0
Approved Qty:	100,678.5
UnApproved Qty:	224,705.5
Balance Qty:	0.00
Ordered Qty:	0
Received Qty:	1
Transfer Details	
Transfer In:	0
Transfer Out:	0
Stock On Hand:	0

Below the Indented Qty Fact Box is a "Notes" section with a link: "Click here to create a new note." At the bottom right of the form is an "OK" button.

- Select the Following Fields (Mandatory Fields in the MRN)
 1. Request Location Code
 2. Supply Location: (*Requesting Site when locally purchase*)
 3. Delivery Location
 4. Item No
 5. Quantity
 6. Unit of Measure
 7. Remarks

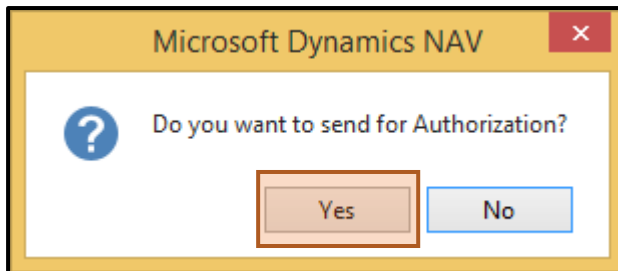
1.3 Sending MRN for Approval

1. After inserting the item description line, the document should be sent for approval. Click “Authorization” in Actions ribbon bar.

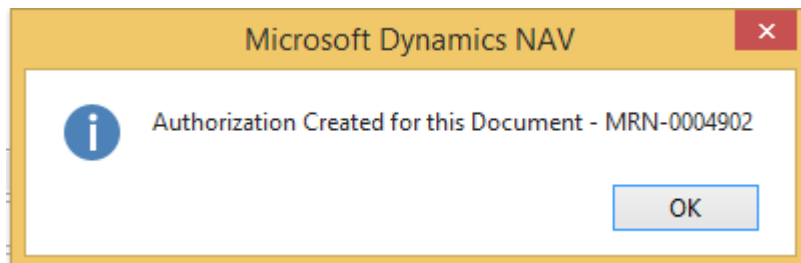
The screenshot shows the 'New - Material Requisition Note - Purchase Indent' form in Microsoft Dynamics NAV. The ribbon bar at the top has 'HOME', 'ACTIONS', and 'NAVIGATE' tabs. Under the 'ACTIONS' tab, the 'Authorization' button is highlighted with a red box. The form contains various fields for requisition details, including 'Requisition No.', 'Project No.', 'Requested Location Name', and 'Supply Location Name'. Below the fields is a table with the following data:

Type	No	Description	Quantity	Unit of Mea...	Project Tas...	PO Quantity	Budget Qu...
Item	75951	7 Wire Supper Grade Strand 12.9mm	20	MT		0	

2. Click “Yes” in the confirmation message.



3. A Confirmation message will be displayed after creating the approval entries.



- Status of the document will be changed to “Pending Approval”.

Purchase Indent - MRN-0004902

Requisition No: MRN-0004902
 Manual MRN No.:
 Project No: PROJ-0000016
 Project Name: ITUM Project
 Request By: TOTALAMBER\S.WICKRAMASINGHE
 Requisition Date: 18/11/2015
 Requisition Time: 10:00:50 AM
 Status: Pending Approval
 Sbu Code: 1.0 BUILDING
 Projects Code: 3-01100
 Project Code Name: ITUM Diyagama

Expected Date:
 Request Location Code: 3-01100
 Requested Location Name: ITUM Diyagama
 Supply Location: 3-01100
 Supply Location Name: ITUM Diyagama
 Remark:
 Delivery Location: 3-01100
 Delivery Location Name: ITUM Diyagama
 Approved User:
 MRN Approved Date and Time:
 Verification Status: Open
 Priority: Low

Indented Qt...
 No: 75951
 Budgete... 0
 Approv... 0
 UnAppr... 0
 Balance ... 0.00
 Ordered... 0
 Receive... 0
Transfer Details
 Transfe... 0
 Transfe... 0
 Stock ... 0

Notes
[Click here to create a n...](#)

Upload Image which is less than '1 MB':

Purchase Indent Subform

Type	No	Description	Quantity	Unit of Mea...	Project Tas...	PO Quantity	Budget Qui...
Item	75951	7 Wire Supper Grade Strand 12.9mm	20	MT		0	

1.4 Approving MRN

- Navigate to Departments -> Projects -> Approval Management -> User tasks to view the approval request entry. Only the entries open for the logged in user will be displayed.

Approval Management - Microsoft Dynamics NAV

ICCP_ERP > Departments > Projects > Approval Management > Search (Ctrl+F3)

Departments
 Financial Management
 Sales & Marketing
 Purchase
 Warehouse
 Home
 Projects
 Material Management
 Resource Management
 Approval
 Departments

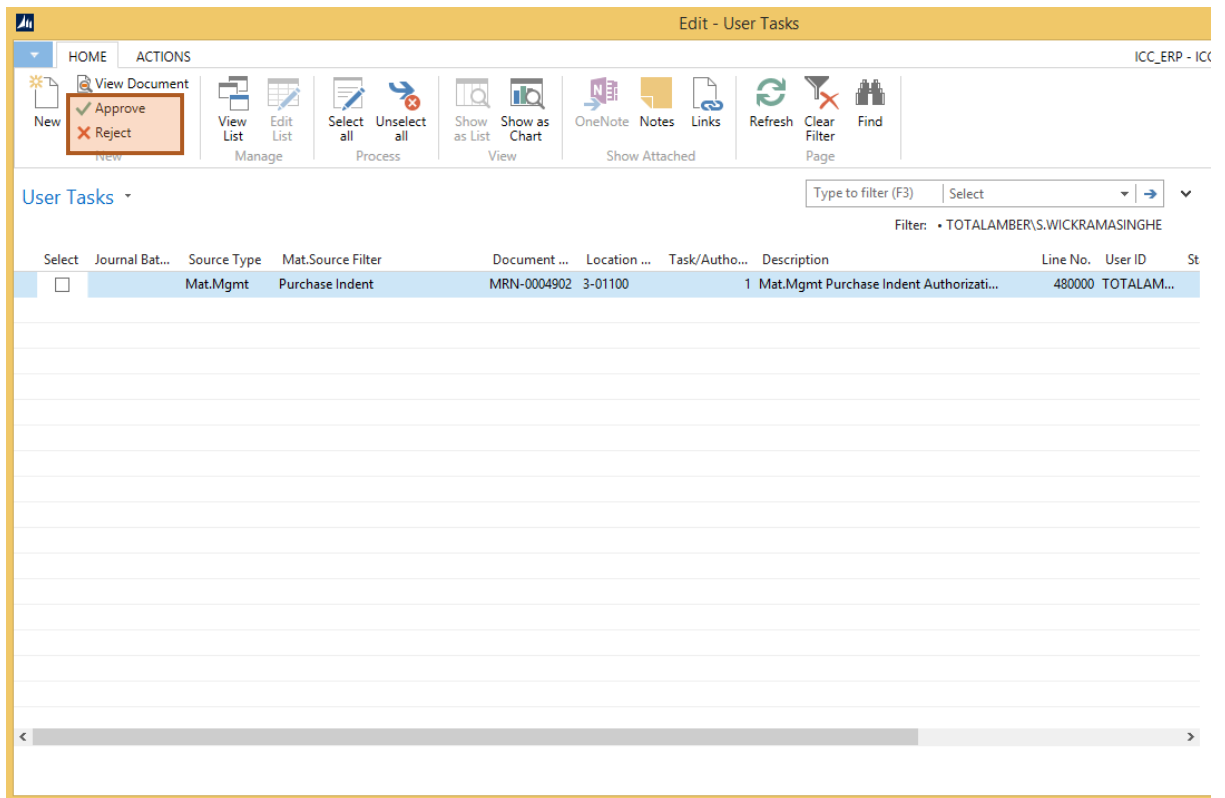
Approval Management

Lists
 Alternative Users List
 Authorization Header List
 Authorization Template
 Journal Setup List
 Authorization Register

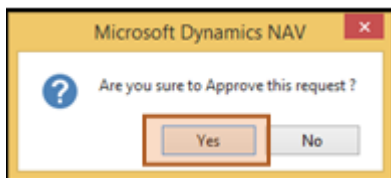
Tasks
 User Tasks

ICCP_ERP Wednesday, September 16, 2015 TOTALAMBER\T.PERERA

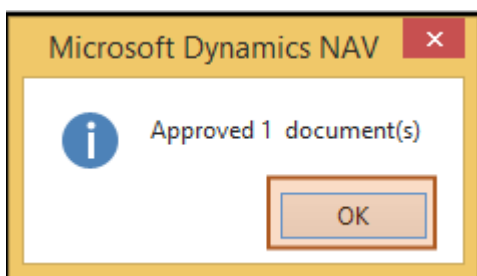
2. Authorized users can “Approve” or “Reject” the orders.



3. Click “Yes” for confirmation message.



4. Confirmation of the approval will be displayed. Click “Ok”.



5. The status of the MRN will be changed to “Released”.

Purchase Indent · MRN-0004902

Requisition No: MRN-0004902
 Manual MRN No.:
 Project No: PROJ-0000016
 Project Name: ITUM Project
 Request By: TOTALAMBER\S.WICKRAMASINGHE
 Requisition Date: 18/11/2015
 Requisition Time: 10:00:50 AM
 Status: Released
 Sbu Code: 1.0 BUILDING
 Projects Code: 3-01100
 Project Code Name: ITUM Diyagama

Expected Date:
 Request Location Code: 3-01100
 Requested Location Name: ITUM Diyagama
 Supply Location: 3-01100
 Supply Location Name: ITUM Diyagama
 Remark:
 Delivery Location: 3-01100
 Delivery Location Name: ITUM Diyagama
 Approved User: TOTALAMBER\S.WICKRAMASINGHE
 MRN Approved Date and Time: 18/11/2015 10:46 AM
 Verification Status: Open
 Priority: Low

Upload Image which is less than '1 MB'.

Purchase Indent Subform

Home | Item Creation -Temp | Cancel Line | Update Item Description | Find | Filter | Clear Filter

Type	No	Description	Net Quantity	Qty. Base On S...	PRN Quantity	Select	Outstanding
Item	75951	7 Wire Supper Grade Strand 12.9mm	0	0	0	<input type="checkbox"/>	

1.5 Verifying the MRN

Click “Verified” in the Actions Tab of the ribbon bar.

Purchase Indent · MRN-0004902

Requisition No: MRN-0004902
 Manual MRN No.:
 Project No: PROJ-0000016
 Project Name: ITUM Project
 Request By: TOTALAMBER\S.WICKRAMASINGHE
 Requisition Date: 18/11/2015
 Requisition Time: 10:00:50 AM
 Status: Released
 Sbu Code: 1.0 BUILDING
 Projects Code: 3-01100
 Project Code Name: ITUM Diyagama

Expected Date:
 Request Location Code: 3-01100
 Requested Location Name: ITUM Diyagama
 Supply Location: 3-01100
 Supply Location Name: ITUM Diyagama
 Remark:
 Delivery Location: 3-01100
 Delivery Location Name: ITUM Diyagama
 Approved User: TOTALAMBER\S.WICKRAMASINGHE
 MRN Approved Date and Time: 18/11/2015 10:46 AM
 Verification Status: Open
 Priority: Low

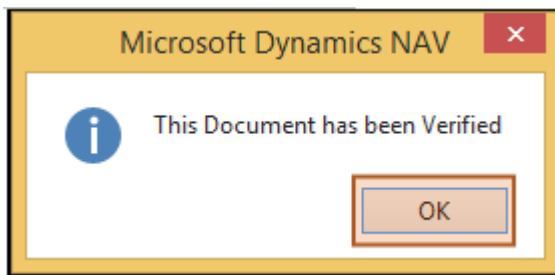
Upload Image which is less than '1 MB'.

Purchase Indent Subform

Home | Item Creation -Temp | Cancel Line | Update Item Description | Find | Filter | Clear Filter

Type	No	Description	Net Quantity	Qty. Base On S...	PRN Quantity	Select	Outstanding
Item	75951	7 Wire Supper Grade Strand 12.9mm	0	0	0	<input type="checkbox"/>	

6. The Document will be verified.



7. Verification status will be changed to “Released” from “Open”.

A screenshot of the Microsoft Dynamics NAV interface for editing a "Material Requisition Note - Purchase Indent" with ID "MRN-0004902". The interface includes a top navigation bar with "HOME", "ACTIONS", and "NAVIGATE" tabs. Below this is a ribbon with icons for "Verified Reopen", "Authorization Approval", and "Print Report". The main area displays the "Purchase Indent" form with a "General" tab selected. The form contains various fields for requisition details. The "Verification Status" field is highlighted with a red border and shows "Released".

Requisition No:	MRN-0004902	Expected Date:	
Manual MRN No.:		Request Location Code:	3-01100
Project No:	PROJ-0000016	Requested Location Name:	ITUM Diyagama
Project Name:	ITUM Project	Supply Location:	3-01100
Request By:	TOTALAMBER\S.WICKRAMASINGHE	Supply Location Name:	ITUM Diyagama
Requisition Date:	18/11/2015	Remark:	
Requisition Time:	10:00:50 AM	Delivery Location:	3-01100
Status:	Released	Delivery Location Name:	ITUM Diyagama
Sbu Code:	1.0 BUILDING	Approved User:	TOTALAMBER\S.WICKRAMASINGHE
Projects Code:	3-01100	MRN Approved Date and Time:	18/11/2015 10:46 AM
Project Code Name:	ITUM Diyagama	Verification Status:	Released
		Priority:	Low

1.6 Creating Purchase Requisition Note (PRN)

1. Type the Qty Needed to Create a “PRN”
2. Select the lines that should be transferred to “PRN”.

Upload Image which is less than '1 MB':

Type	No	Description	Item Quantity	Qty. Base On S...	PRN Quantity	Select	Outstanding
Item	75951	7 Wire Supper Grade Strand 12.9mm	0	0	0	<input checked="" type="checkbox"/>	

3. Click “Create PRN” in the Ribbon Bar.

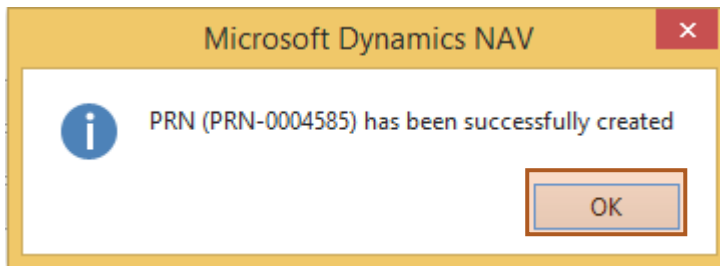
4. Confirmation message will be displayed.

Microsoft Dynamics NAV

Do you want to create a PRN?

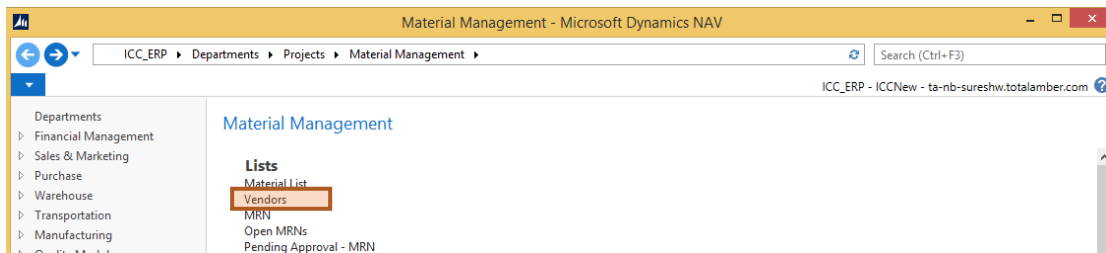
Yes No

5. Verification message after creating the PRN will be displayed.



1.7 Suppliers Availability Check

1. Navigate to Departments -> Projects -> Material Management-> Vendors



From the vendors list check whether you required vendor was available, you can create PO's for vendor No. begin with "V" Ex: V01254

1.8 Create Purchase Order from PRN

1. Navigate to Departments -> Projects -> Material Management -> PRN List

After opening PRN list, you can find relevant PRN number by typing PRN number on search as below “1” then press enter key then you will see search PRN, you need to select it as “2” and click Edit link on menu bar as “3”.

ICC_ERP > Departments > Projects > Material Management >

Material Management

Lists
 Material List
 Vendors
 MRN
 Open MRNs
 Pending Approval - MRN

View - Consolidated Indent List

HOME

New Edit View Delete Show as List Show as Chart Notes Links Refresh Clear Filter Find

Consolidated Indent List - PRN-0013949 Consolidated Indent No.

Consolid... No.	Initiated By	Status	Total No. of RFQ	Manual MRN No.	PRN Lines Out...	MRN No.	Requested Location	Requested Location Name	Supply Location
PRN-0013949	ICCSRV\DUMINDA	Open	0		Yes	MRN-00168...	3-01100	ITUM Diyagama	6-00600

2. After opening PRN you will see it as below;

You need to enter below highlighted fields.

PRN-0013949

General

Consolidated Indent No: PRN-0013949
 Manual MRN No.:
 Requisition Date: 8/18/2016
 Project No: PROJ-0000016
 Project Name: ITUM Project
 Expected Date: 8/21/2016
 Priority: High
 Request Location Code: 3-01100

Requested Location Name: ITUM Diyagama
 Supply Location: 6-00600
 Supply Location Name: Main Stores Madapatha
 Delivery Location: 3-01100
 Delivery Location Name: ITUM Diyagama
 Requested By: ICCSRV\DUMINDA
 PRN Completed Date and Time:
 MRN-0016884

PO/RFQ Creation

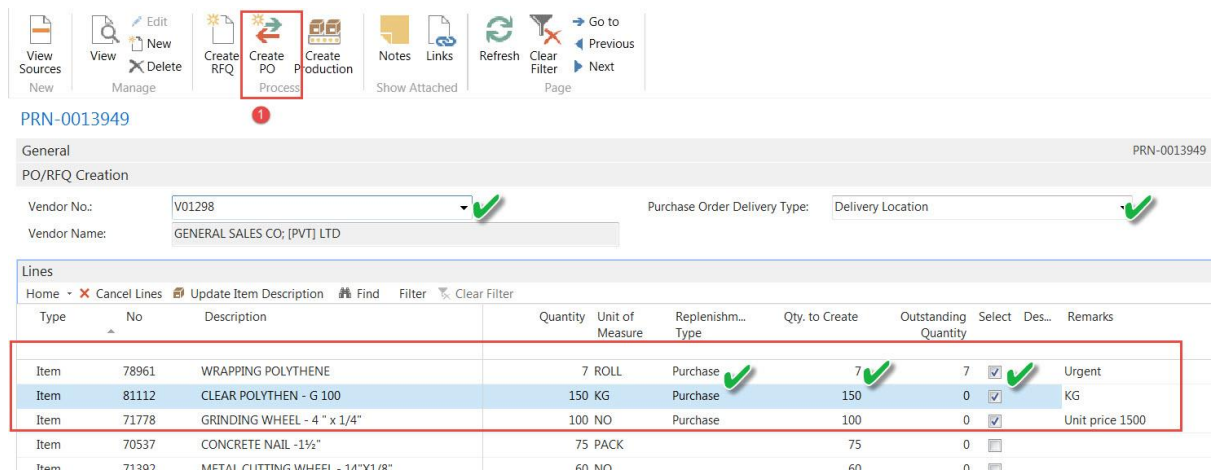
Vendor No: 1
 Vendor Name:
 Purchase Order Delivery Type: 2

Lines

Type	No	Description	Quantity	Unit of Measure	Replenishm... Type 3	Qty. to Create 4	Outstanding Quantity	Select 5	Description	Remarks
Item	78961	WRAPPING POLYTHENE	7	ROLL		7	7	<input type="checkbox"/>		
Item	81112	CLEAR POLYTHEN - G 100	150	KG		150	0	<input type="checkbox"/>		KG
Item	71778	GRINDING WHEEL - 4" x 1/4"	100	NO		100	0	<input type="checkbox"/>		

3. After selecting required fields PRN page will look like below;

After filling page fields need to click on “Create PO” link on menu bar as step “1”



PRN-0013949

General PRN-0013949

PO/RFQ Creation

Vendor No.: V01298 Purchase Order Delivery Type: Delivery Location

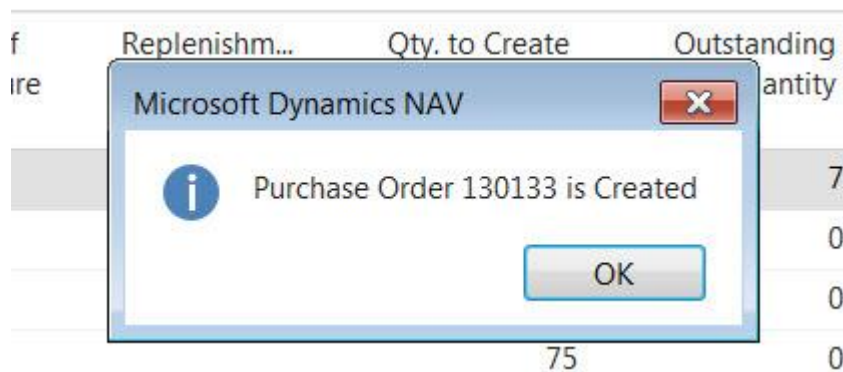
Vendor Name: GENERAL SALES CO; [PVT] LTD

Lines

Home Cancel Lines Update Item Description Find Filter Clear Filter

Type	No	Description	Quantity	Unit of Measure	Replenish... Type	Qty. to Create	Outstanding Quantity	Select	Des...	Remarks
Item	78961	WRAPPING POLYTHENE	7	ROLL	Purchase <input checked="" type="checkbox"/>	7 <input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Urgent
Item	81112	CLEAR POLYTHEN - G 100	150	KG	Purchase <input checked="" type="checkbox"/>	150	0	<input checked="" type="checkbox"/>		KG
Item	71778	GRINDING WHEEL - 4" x 1/4"	100	NO	Purchase	100	0	<input checked="" type="checkbox"/>		Unit price 1500
Item	70537	CONCRETE NAIL -1 1/2"	75	PACK		75	0	<input type="checkbox"/>		
Item	71302	METAL CUTTING WHEEL - 14"X1/8"	60	NO		60	0	<input type="checkbox"/>		

4. Verification message will be created with a new Purchase Order number assigned.



Microsoft Dynamics NAV

i Purchase Order 130133 is Created

OK

Replenish...	Qty. to Create	Outstanding quantity
	7	7
	0	0
	0	0
	75	0

1.9 Opening Created Purchase Order

Navigate Departments -> Warehouse -> Orders & Contacts -> Purchase Order

After selecting relevant purchasing order click on edit button.

Purchase Order No.	Vendor Name	Status	Docum... Date	Consolidated Indent No.	Purchaser Code	Location Code	Sbu Code	Projects Code
130133	GENERAL SALES CO; [PVT] LTD	Open	2/23/2017	PRN-0013949		3-01100		

In the purchase order page, you need to check following fields are filled.

- Location Code:
- Tax Area Code / Tax Liable if tax applicable:
- Direct unit cost:
- SBU Code / Project Code:

130133 - GENERAL SALES CO; [PVT] LTD

General

Purchase Order No.: 130133
Project No.: PROJ-0000016
Project Name: ITUM Project
Buy-from Vendor No.: V01298
Buy-from Contact No.: CT006145
Buy-from Vendor Name: GENERAL SALES CO; [PVT] LTD
Buy-from City:
Posting Date: 2/23/2017
Order Date: 2/23/2017
Document Date: 2/23/2017
Vendor Order No.:
Vendor Shipment No.:
Vendor Invoice No.:

Status: Open
Initiated By: ICCSRV/SANKA
Location Code: 4-01100
Payment Terms Code:
Requested Receipt Date:
Promised Receipt Date:
Expected Receipt Date:
Ship-to Code:
Receiving No. Series:
Tax Area Code: VAT 11%
Tax Liable:
Description 2:
Vehicle No.:
SK / ASK Code:

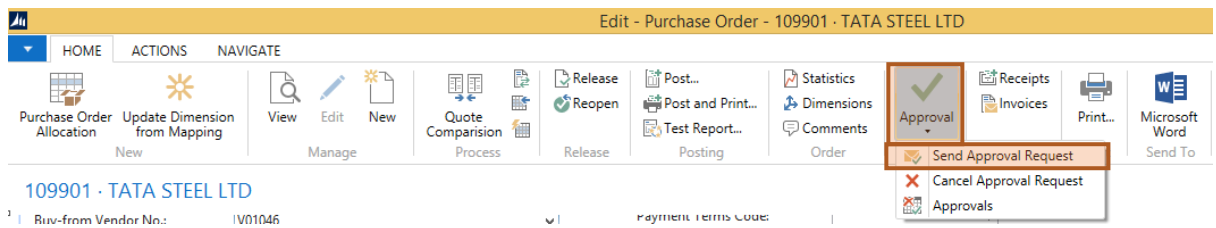
Lines

Type	No.	Description	Unit of Measure Code	Location Code	Quantity	Direct Unit Cost Excl. VAT	Qty. to Receive	Sbu Code	Projects Code	GRN Compl..	Quantity Received	Remarks
Item	78961	WRAPPING POLYTHENE	ROLL	3-01100	7	1,500.00		2.0 ROADS	4-01100	<input type="checkbox"/>		Urgent

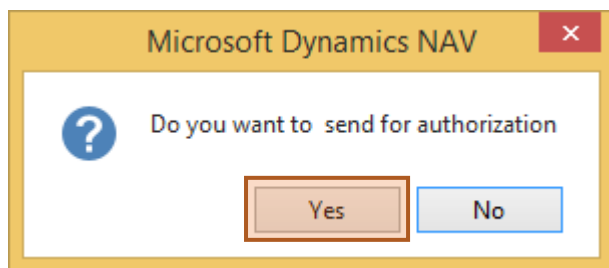
After filling above fields, you need to send it for further approvals;

1.10 Sending Purchase Order for Approval

1. After the Purchase Order is created, the document should be sent for approval. Click “Send Approval Request” in the Home Tab of the Ribbon



2. Click “Yes” for confirmation message.



3. After sending approval PO status change to “Pending Approval” as below.

Purchase Orders -

Type to filter (F3) Purchase Order No. Limit totals: *.02/22/17

Purchase Order No.	Vendor Name	Status	Docum... Date	Consolidated Indent No	Purchaser	Location	Sbu Code	Projects Code	Purchase Quote No.	In
130131	DELTA METALICS	Open	2/23/2017	PRN-0021051	PR10	PE-STORES				ICC
130130	LAKSHAN AUTO ENTERPRISES	Open	2/23/2017	PRN-0021051	PR10	PE-STORES				ICC
130129	D.R. INDUSTRIES (PVT) LTD	Pending Approval	2/23/2017	PRN-0021290		4-01400				ICC
130128	D.R. INDUSTRIES (PVT) LTD	Pending Approval	2/23/2017	PRN-0021289		4-01300				ICC
130127	DELTA METALICS	Open	2/23/2017	PRN-0021127	PR10	PE-STORES				ICC
130126	DELTA METALICS	Open	2/23/2017	PRN-0020444	PR10	PE-STORES				ICC
130125	DELTA METALICS	Open	2/23/2017	PRN-0021137	PR10	PE-STORES				ICC
130124	GUANG DONG KIN LONG HARDWARE PROD...	Pending Approval	2/23/2017	PRN-0020343		6-00600				ICC
130123	DELTA METALICS	Open	2/23/2017	PRN-0020934	PR10	PE-STORES				ICC
130122	GUANG DONG KIN LONG HARDWARE PROD...	Pending Approval	2/23/2017	PRN-0017870		6-00600				ICC
130121	GUANG DONG KIN LONG HARDWARE PROD...	Pending Approval	2/23/2017	PRN-0017870		6-00600				ICC
130120	GUANG DONG KIN LONG HARDWARE PROD...	Pending Approval	2/23/2017	C-PRN-0005246		6-00600				ICC
130119	DELTA METALICS	Open	2/23/2017	PRN-0020936	PR10	PE-STORES				ICC
130118	DELTA METALICS	Open	2/23/2017	PRN-0020705	PR10	PE-STORES				ICC
130117	GUANG DONG KIN LONG HARDWARE PROD...	Pending Approval	2/23/2017	C-PRN-0005246		6-00600				ICC
130116	DELTA METALICS	Open	2/23/2017	PRN-0021137	PR10	PE-STORES				ICC
130115	WESTERN PVC & HARDWARE STORES	Released	2/23/2017	PRN-0021250		6-00600				ICC
130114	DELTA METALICS	Open	2/23/2017	PRN-0020836	PR10	PE-STORES				ICC

Vendor I
Action:
Vendor N
Name:
Phone No
E-Mail:
Fax No.:
Contact:
Notes