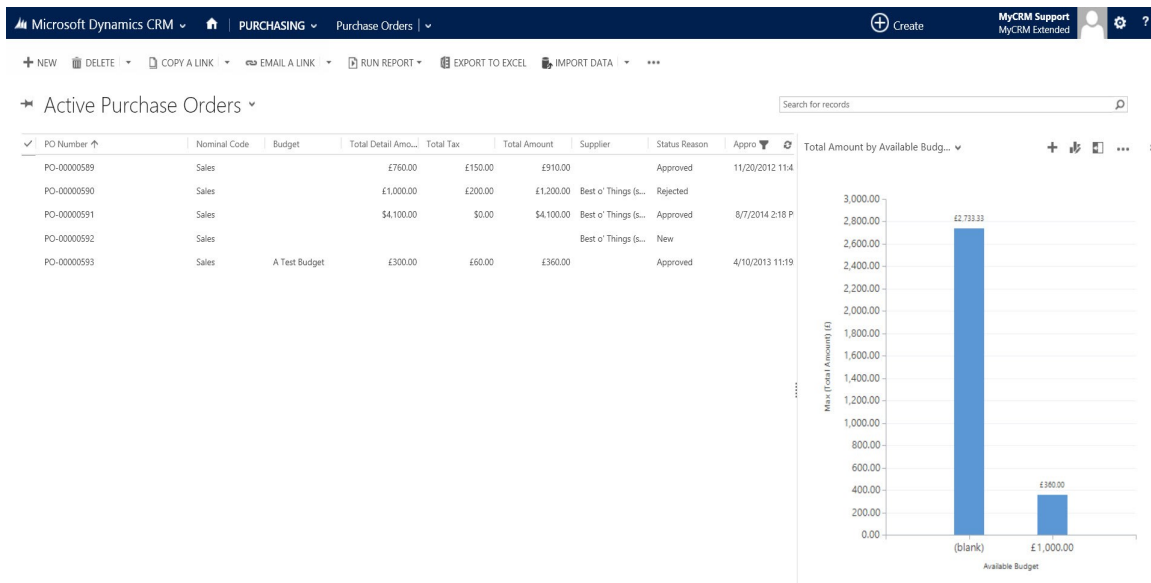


ePurchasing 2013

Manage costs across Suppliers and Partners

ePurchasing for Microsoft CRM 2013 enables your organisation to track outbound Purchase Orders that are raised against suppliers or partners held within CRM.

This enhancement to CRM provides the ability to fully record the cost of sale for either resource or components. If your company either resells 3rd party products or purchases components for product build, or even uses external resource for consulting or support, ePurchasing provides the ideal solution to enhance your use of CRM within Sales, Finance and Procurement



Key Enhancements and Benefits:

- Create a PO and email directly to a supplier from CRM
- Records budget and spend by cost centre
- Easily track spend against Orders generated in CRM
- Provides CRM charts for snap shot view of budgets
- Full tracking of the approval process built in

For Additional Information

Contact : [Alistair Dickinson](#)
 Email : sales@mycrmgroup.com
 Phone : [01983 245245](tel:01983 245245)
 Web : www.mycrmgroup.com

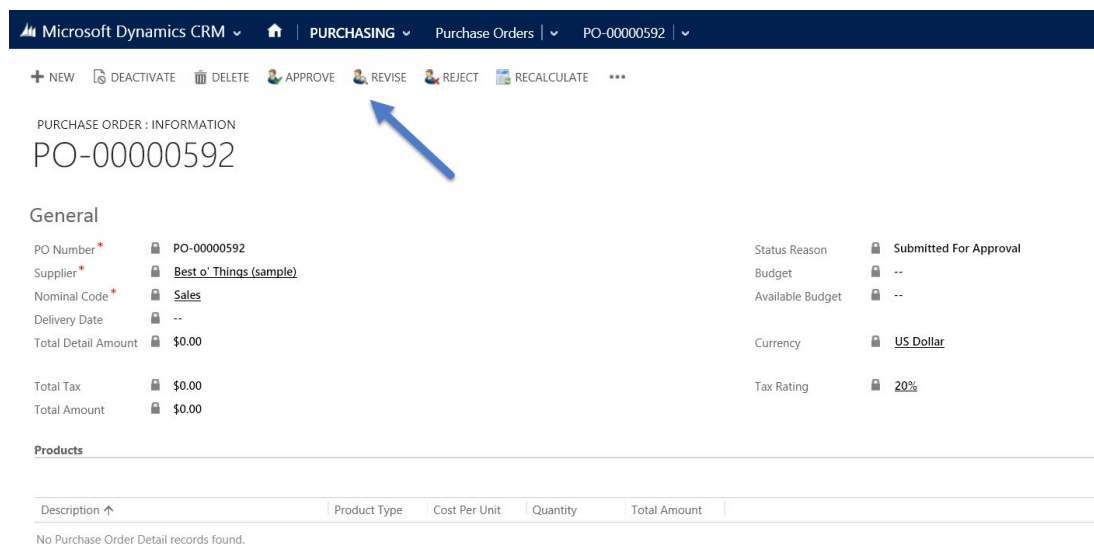
ePurchasing 2013

Managing Purchase Orders

From within CRM you can now create a new purchase order record directly against a supplier or a partner and configure the system to show related partner or supplier products and services. However you manage Purchase Orders within your organisation either it be through finance and an accounting system or through a simple template in Word or Excel, ePurchasing allows you to manage the entire process from within one business system (CRM).

Not only can, supplier and customer information now be shared, ePurchasing also helps to save time by eliminating unnecessary duplication of data across multiple applications.

ePurchasing provides companies additional benefits from gaining a far greater understanding and view of data made available by using real time CRM reporting.



Approval Process

ePurchasing has an approval process based on CRM security roles giving flexibility for the assignment of the purchasing role within your organisation.

The roles in CRM are split for purchasing managers and buyers, giving flexibility for anyone to create a Purchase Order and then have it approved by the person's / people responsible for this within the organisation.

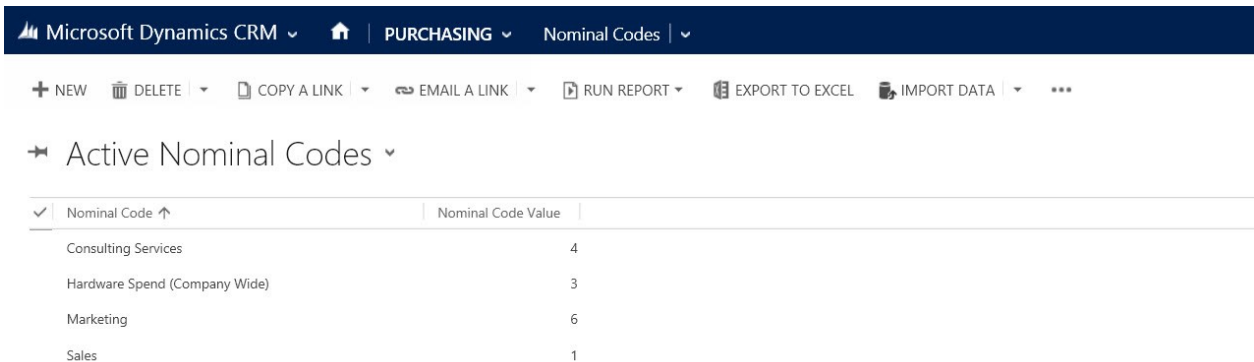
For Additional Information

Contact : [Alistair Dickinson](#)
 Email : sales@mycrmgroup.com
 Phone : [01983 245245](tel:01983 245245)
 Web : www.mycrmgroup.com

ePurchasing 2013

Creating Nominal Codes and Budgets

As part of the ePurchasing solution we have catered for both nominal codes (Cost Centres) and Budget creation. Every time a Purchase Order is approved the associated budget is reduced to reflect the spend on suppliers or partners. This information can be viewed on the Purchase Order or at the Budget level



The screenshot shows the Microsoft Dynamics CRM interface for the 'PURCHASING' module, specifically the 'Nominal Codes' view. The breadcrumb trail is 'Microsoft Dynamics CRM > PURCHASING > Nominal Codes'. The toolbar includes options for '+ NEW', 'DELETE', 'COPY A LINK', 'EMAIL A LINK', 'RUN REPORT', 'EXPORT TO EXCEL', and 'IMPORT DATA'. The main content area is titled 'Active Nominal Codes' and displays a table with two columns: 'Nominal Code' and 'Nominal Code Value'.

Nominal Code	Nominal Code Value
Consulting Services	4
Hardware Spend (Company Wide)	3
Marketing	6
Sales	1

Nominal Codes (Cost Centre)

A nominal code is recorded against the business area that is likely to have a spend on suppliers or partners whilst in the course of doing business. This relationship enhances your business by enabling you to report against spend vs. revenue directly from within CRM, The solution can also be used to track service and project spend like onsite expenses for a service team.

A nominal code can have several related budgets, e.g. Marketing team may have an online budget vs. a PR budget. Consulting may have a hardware budget, a travel budget, or even project budgets.

Reporting on spend can be achieved by creating CRM dashboards to get a real time view of spend and budget.

For Additional Information

Contact : [Alistair Dickinson](#)

Email : sales@mycrmgroup.com

Phone : [01983 245245](tel:01983 245245)

Web : www.mycrmgroup.com

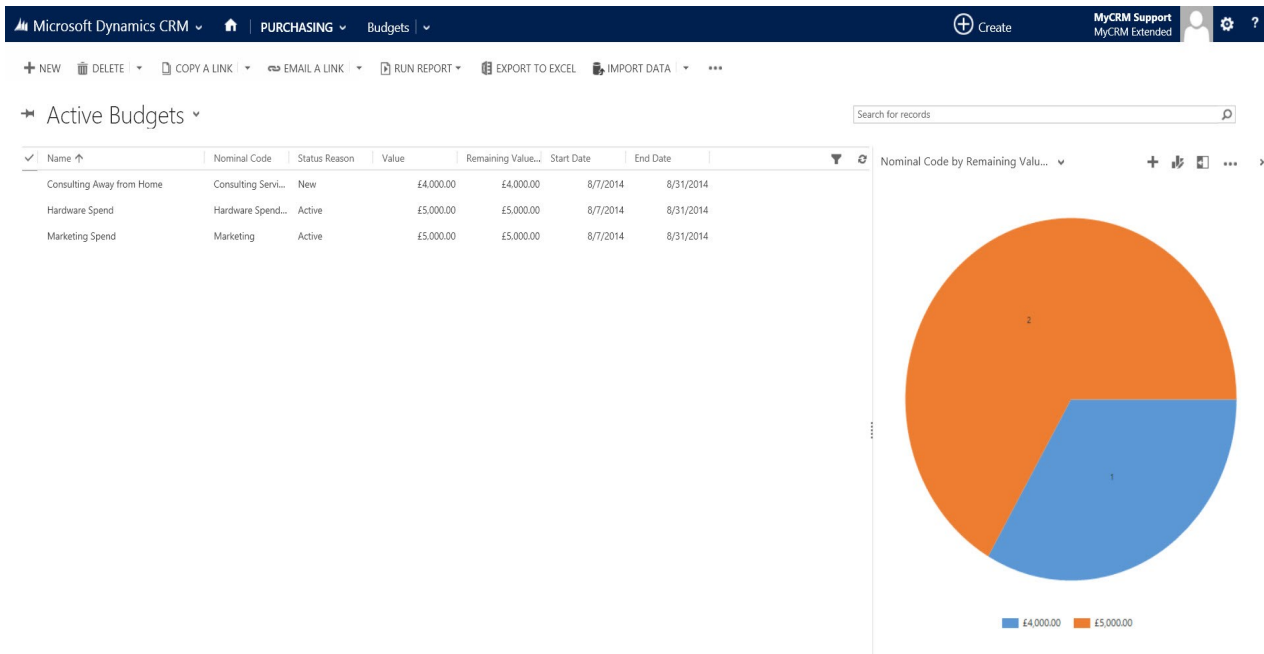
ePurchasing 2013

Budgets

On the budget screen you can easily track available budget by the nominal code (Cost Centre) or Business area. This feature helps track spend and if the budgets are set to be quarterly you can see performance of spend on suppliers for a period.

Additional Features

ePurchasing also features further enhanced functionality which is provided by use of ePDF, eTax and eNumber (other standalone products available from MyCRM). The additional functionality included as part of ePurchasing empowers CRM users to quickly:



The screenshot shows the Microsoft Dynamics CRM interface for the 'PURCHASING' module, specifically the 'Budgets' screen. The table below lists active budgets:

Name	Nominal Code	Status Reason	Value	Remaining Value...	Start Date	End Date
Consulting Away from Home	Consulting Servi...	New	£4,000.00	£4,000.00	8/7/2014	8/31/2014
Hardware Spend	Hardware Spend...	Active	£5,000.00	£5,000.00	8/7/2014	8/31/2014
Marketing Spend	Marketing	Active	£5,000.00	£5,000.00	8/7/2014	8/31/2014

To the right of the table is a pie chart titled 'Nominal Code by Remaining Valu...'. The chart shows two segments: a blue segment representing £4,000.00 (labeled '1') and an orange segment representing £5,000.00 (labeled '2').

Key Pointers

- Create a Purchase Order against a Supplier record
- Issue the Purchase Order as an attachment by email
- Create its own unique tracking number and also to
- Ensure the correct level of Tax is calculated and added

For Additional Information

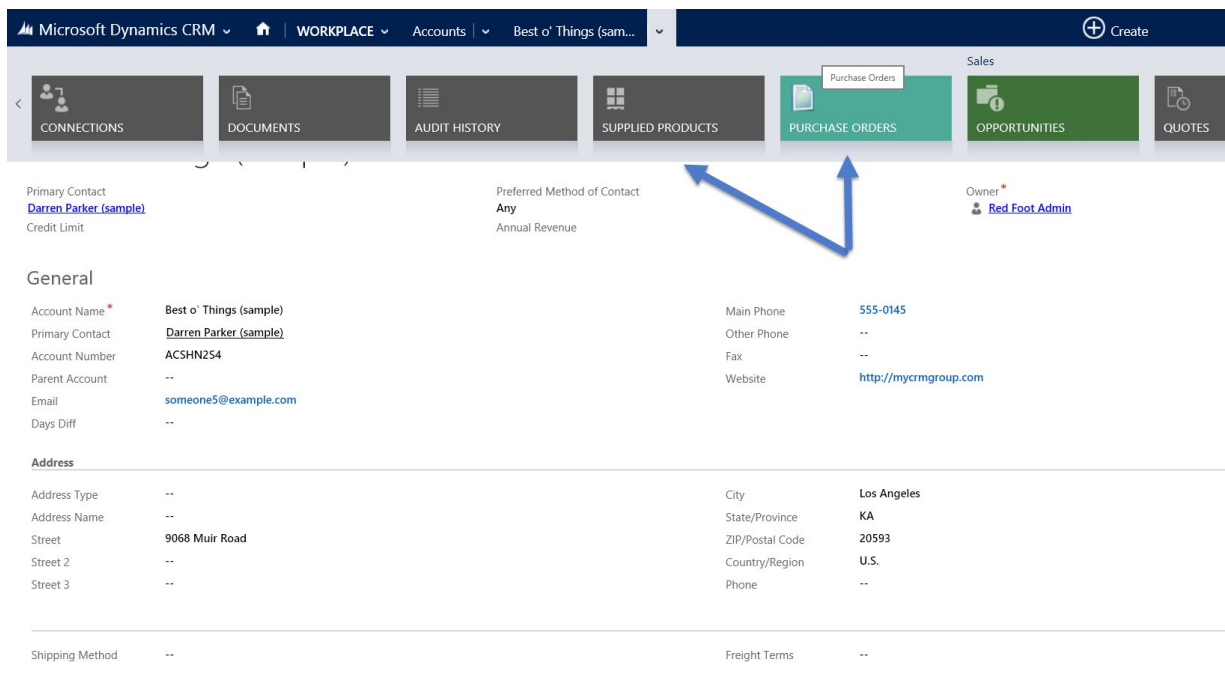
Contact : [Alistair Dickinson](#)
 Email : sales@mycrmgroup.com
 Phone : [01983 245245](tel:01983 245245)
 Web : www.mycrmgroup.com

ePurchasing 2013

Supplier Product Management

Our ePurchasing solution also supports write-in or standard products directly from CRM, allowing you to create supplier products as well as organisational products. Products associated to a supplier record will show under the supplier record giving a detailed account of what products are available from this supplier or partner.

You can also see all related purchase orders direct from the supplier record and see the related status.



Microsoft Dynamics CRM | WORKPLACE | Accounts | Best o' Things (sam... | Create

Primary Contact: [Darren Parker \(sample\)](#)
Credit Limit: --

Preferred Method of Contact: Any
Annual Revenue: --

Owner: [Red Foot Admin](#)

General

Account Name *	Best o' Things (sample)	Main Phone	555-0145
Primary Contact	Darren Parker (sample)	Other Phone	--
Account Number	ACSHN254	Fax	--
Parent Account	--	Website	http://mycrmgroup.com
Email	someone5@example.com		
Days Diff	--		

Address

Address Type	--	City	Los Angeles
Address Name	--	State/Province	KA
Street	9068 Muir Road	ZIP/Postal Code	20593
Street 2	--	Country/Region	U.S.
Street 3	--	Phone	--

Shipping Method: -- | Freight Terms: --

Using CRM products you can associate individual products in the system with a supplier (Account record) giving you a filtered view of the products that a supplier can ship.

Note: If a supplier ships the same product as another supplier duplicate entries will be required due to pricing and delivery costs.

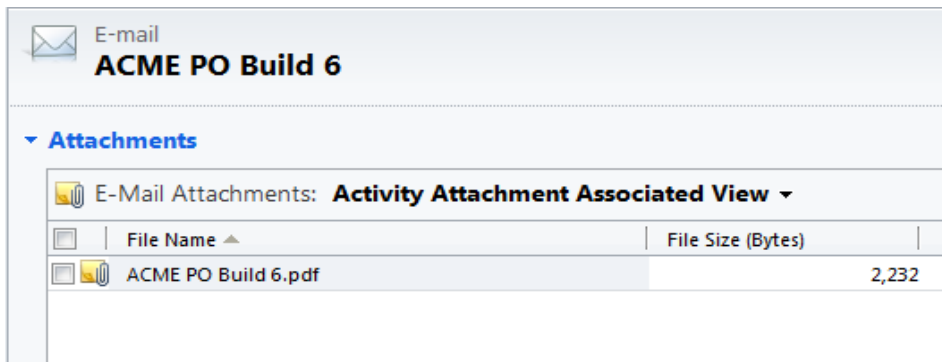
For Additional Information

Contact : [Alistair Dickinson](#)
 Email : sales@mycrmgroup.com
 Phone : [01983 245245](tel:01983 245245)
 Web : www.mycrmgroup.com

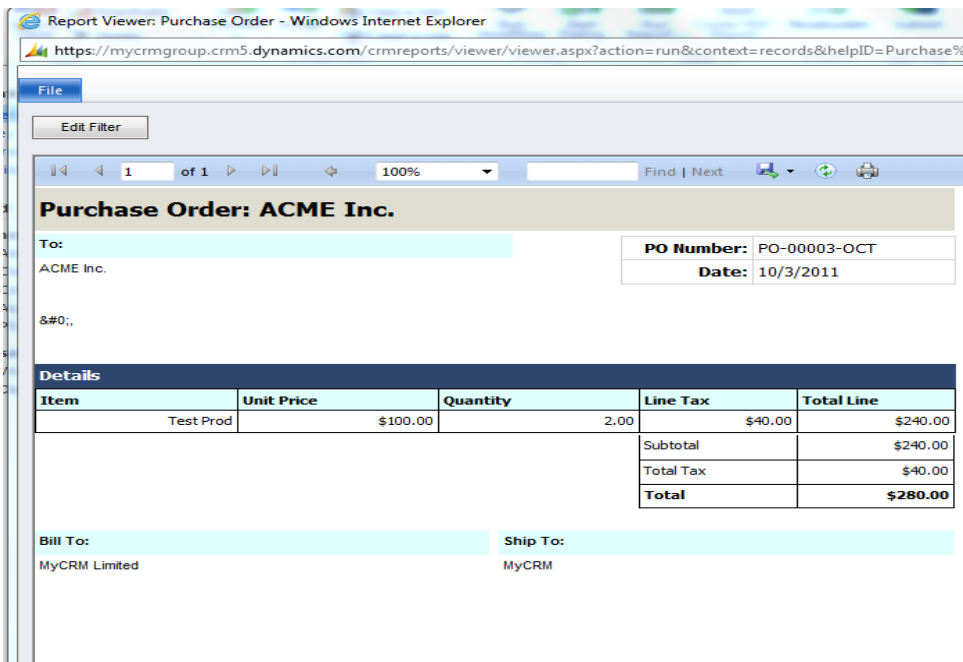
ePurchasing 2013

Sending Purchases Orders

As part of ePurchasing a version of ePDF is included to enable Purchase Orders to be created and easily sent as email attachments.



ePurchasing is installed with a predefined purchase order report which can be configured to meet individual business requirements.



The screenshot shows a web browser window displaying a purchase order report. The report title is 'Purchase Order: ACME Inc.'. The report includes the following details:

To: ACME Inc.
PO Number: PO-00003-OCT
Date: 10/3/2011

Details

Item	Unit Price	Quantity	Line Tax	Total Line
Test Prod	\$100.00	2.00	\$40.00	\$240.00
Subtotal				\$240.00
Total Tax				\$40.00
Total				\$280.00

Bill To: MyCRM Limited
Ship To: MyCRM

Using ePDF the report is run against the purchase record and a PDF is stored on the notes or as an attachment on the email sent. The email is a standard CRM activity record recorded against the Supplier and the Purchase Order.

For Additional Information

Contact : [Alistair Dickinson](#)
 Email : sales@mycrmgroup.com
 Phone : [01983 245245](tel:01983245245)
 Web : www.mycrmgroup.com