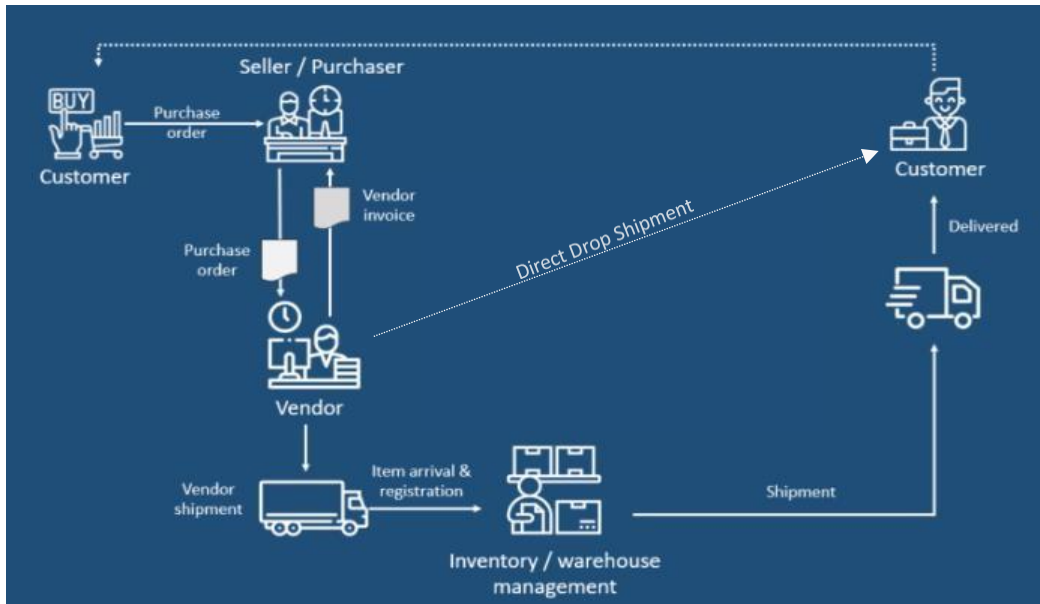



## Procurement and Sourcing with Microsoft Dynamics 365

In the Procurement and sourcing module in Dynamics 365 Supply Chain Management, you create purchasing policies to control the purchasing process. Additionally, you identify suppliers, onboard suppliers as new vendors, maintain vendor information, create agreements with your vendors, order items and services, maintain purchase orders, and confirm receipt of products. After vendor transactions are processed through Accounts payable, you can also analyze spending and vendor performance.




**Create and Manage Procurement Catalogs:** Define the items and services that company employees can order for internal use. Purchasing professionals can create and maintain catalogs of the items and services that can be purchased for internal use in an organization. The catalogs can be used to enforce purchasing policies so that employees can order only the items and services that are allowed for their buying legal entity. You can also create vendor catalogs that contain the products you purchase from vendors and setup external catalogs.



**Configure your procurement category hierarchy before you create the catalog**




**Determine which products you want your employees to be able to order.**




**RFx to PO to Invoice:** Process Requests for Quotations in Microsoft Dynamics 365 to enable visibility to the quoting process, increase traceability, and establish better collaboration between buyers and vendors.

**A. Prepare Requirements**



**Specify the goods/services you are procuring for and set Delivery Time and Date. Allow for alternate**

**B. Release to Prospective Vendors**




**Manually or Auto add vendors. Use the Vendor Portal for better collaboration with your suppliers.**

**C. Bid Scoring and Contract**



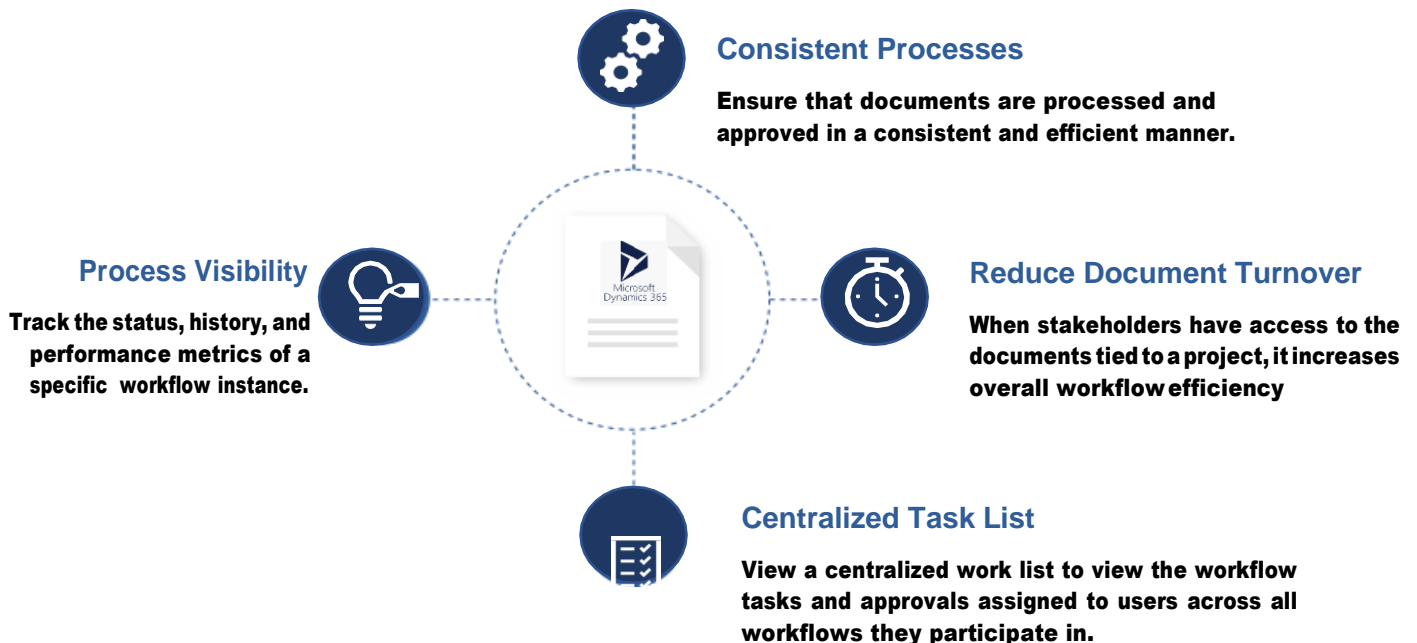
**Set scoring criteria to compare bids that are sent in reply to a RFQ. Award the contract to a single or multiple vendors in Microsoft Dynamics 365**

**D. Receive and Payment**

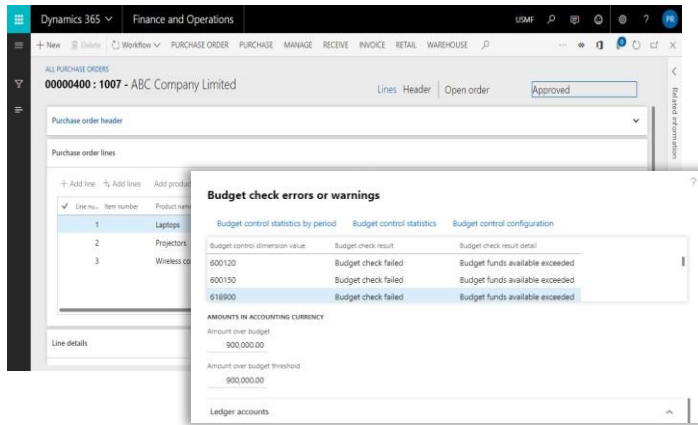


**Utilize an Advance Shipment Notice, Perform quality inspection process and modify quantities received per line item within the system before converting a PO to a Vendor Invoice.**

**Configure Procurement Workflows:** Gain deeper views into spend, contracts, and sourcing. Establishing workflows result to enhanced information sharing, faster collaboration and quicker, more informed decisions for the entire organization.



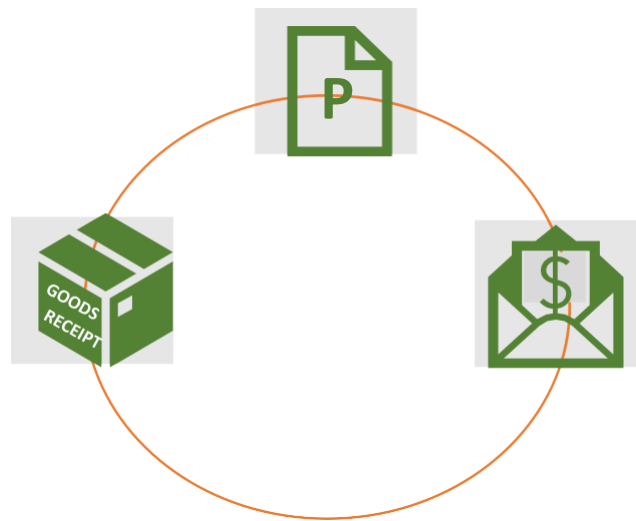
**Budget Controls for Purchase Orders:** Take control of your spend by controlling cost against approved budgets in Microsoft Dynamics 365.



- Enable encumbrance and pre-encumbrance processing for purchase orders.
- Process and carry forward budget year-end
- Define budget control rules, budget groups and other parameters.
- Control overruns on the allocated budgeted amounts

**Three Way Invoice Matching:** Ensure that authorized purchases are made, and suppliers are delivering as promised. Match vendor's invoices with purchase orders and received quantities of goods or services before the invoices are processed and paid.

- Enable Invoice Matching Validation
- Set Up Invoice Totals Tolerance Percentage
- Allow Matching Policy Override
- Allow Invoice Posting With Discrepancy
- Automatically Update Invoice Header Based on Match Status
- Match Price Totals By Percentage, Amount or Both



## About Unify Dots

UNIFY Dots helps you connect the Dots by providing solutions that enable digital transformation. Unify Dots specializes in Ecommerce, ERP, CRM, Customer Engagement, Field Service, Project Operations and Point of Sale solutions.



UNIFY Dots has local presence in Asia Pacific, Australia, New Zealand, Europe, North America and operate in a global scale with a local touch. UNIFY Dots is also committed to improving the world and has pledged donating at least 25% of its profit towards the case of helping educate children from low-income families in developing countries.

## Contact Unify Dots

Email us at [info@unifydots.com](mailto:info@unifydots.com) to get more information on implementing Microsoft Dynamics 365 Supply Chain Management or contact us by calling one of our office locations or visit us at <https://unifydots.com>

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