# 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.
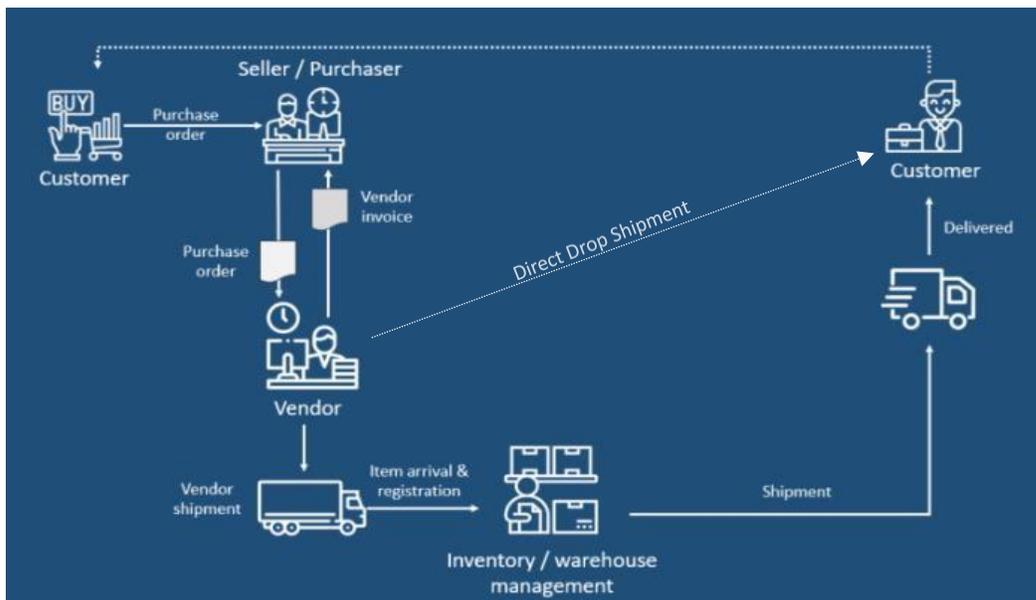
Create and Manage Procurement Catalogs: Define the items and services that company employees can order for internal use. Purchasing professionals can create and maintain catalogs of the items and services that can be purchased for internal use in an organization**.** The catalogs can be used to enforce 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.

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

Prepare Requirements

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

Release to Prospective Vendors

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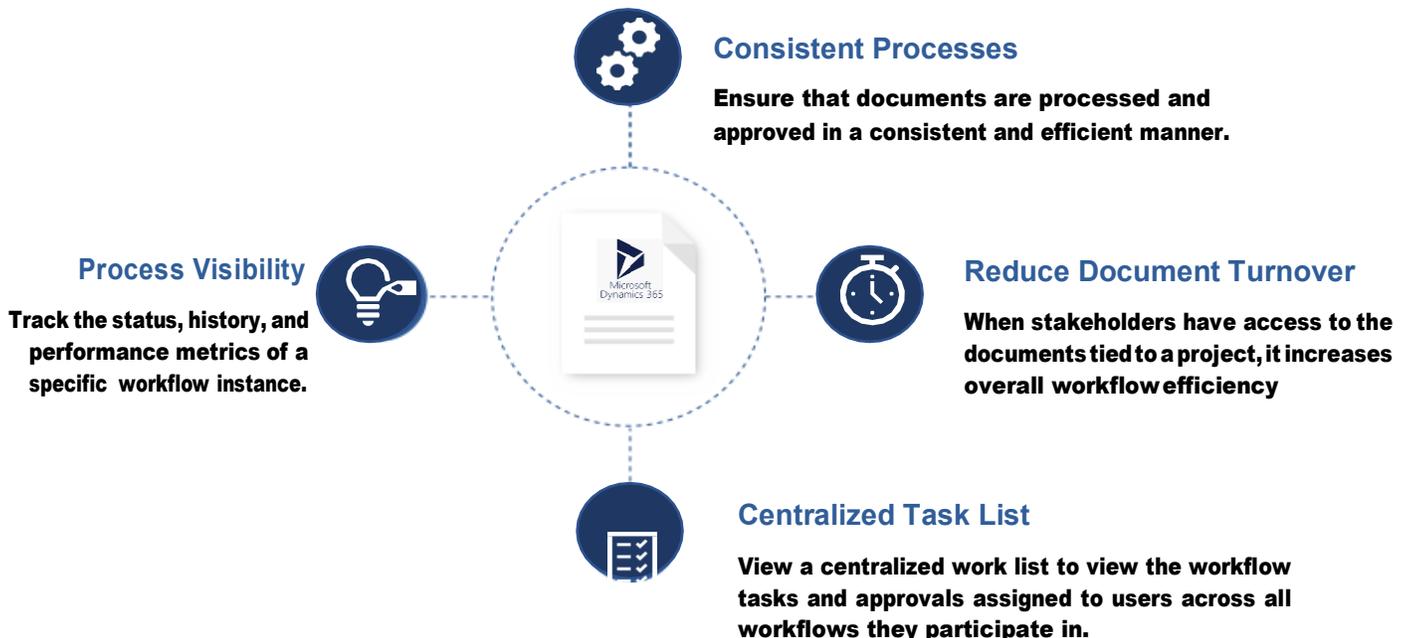
Utilize an Advance Shipment Notice, Perform quality inspection process and modify quantities received per line item within the system before converting a PO to a Vendor Invoice.

C. **Bid Scoring and Contract**

D. **Receive and Payment**

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.

Consistent Processes
Ensure that documents are processed and approved in a consistent and efficient manner.

Process Visibility
Track the status, history, and performance metrics of a specific workflow instance.

Microsoft Dynamics 365

Reduce Document Turnover
When stakeholders have access to the documents tied to a project, it increases overall workflow efficiency

Centralized Task List
View a centralized work list to view the workflow tasks and approvals assigned to users across all workflows they participate in.

Budget Controls for Purchase Orders: Take control of your spend by controlling cost against approved budgets in Microsoft Dynamics 365.
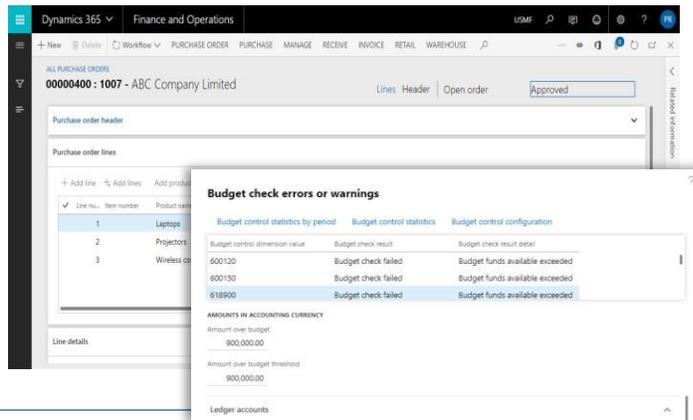
Enable encumbrance and pre-encumbrance processing for purchase orders.

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
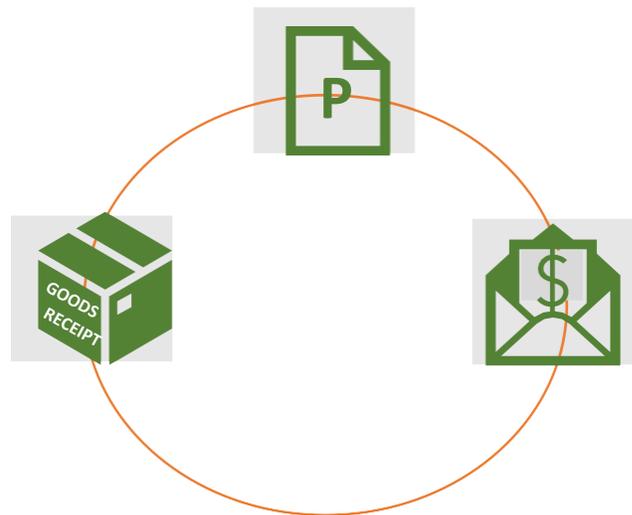
About Unify Dots

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

AI Agents and Copilot enabled work	Finance, Accounting, Treasury, Budgeting, Financial Reporting	Supply Chain, Order Management, Manufacturing and WMS	CRM: Sales, Service, Field Service
Human Resources Management and Talent	Shop floor management, Sustainability and ESG	Data Analytics, Business Intelligence	Customer Experience - Customer Data Platform and Marketing
Power Platform – Power Apps, Automate	IP: Mobile Order Management, Contract Management	E-Commerce & POS	Industry Accelerators –Manufacturing, Agri, Insurance, Maritime, Real Estate

Unify Dots has local presence in Asia Pacific, Australia, New Zealand, Europe, North America and operate on a global scale with a local touch. Unify Dots is also committed to improving the world and has pledged to donate 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** 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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