

CORE FUNCTIONALITY

REQUISITIONS

- Request stock or non-stock items or services
- Configurable and flexible requisition specific workflow
- Punchout to supplier catalog
- Select from internal or external vendor catalogs
- Receiving
- Multiple vendors per requisition
- Auto PO Creation
- Can copy requisitions from Requisition Entry Page
- Buyer queue to give options to consolidate multiple requisitions from same vendor to one PO
- Buyer can control when PO's are created
- Auto email of PO to vendors
- Search and duplicate to quickly create requisitions for recurring orders
- Quick edit to quickly update price and quantity
- Requisition import (options for doc import or Excel import)
- Vendor onboarding process
- Multiple document approval
- Status tab gives complete audit trail of document
- Attach multiple invoices, contracts or other supporting documents

INVOICES

- Non-PO invoices
- PO invoices match to PO 2-way match
- PO invoices match to receipt 3-way match
- Can copy invoices from the Invoice entry page
- Check requests
- Vendor submits electronically
- Document import for multiple invoice import
- Import invoices via excel template
- Configurable and flexible Invoice specific workflow
- Real time lookup to active Vendor list
- Vendor onboarding process
- Attach multiple invoices, contracts or other supporting documents
- Approved invoices generate payable transactions
- Search and duplicate for recurring invoices
- Multiple document approval
- Status tab gives complete audit trail of document

EXPENSES

- Configurable and flexible expense specific workflow
- Document import to import multiple expenses from multiple employees
- Can copy expenses from the expense entry page
- Submit expenses and receipts via smart phones
- Attach supporting documents at the header or the line
- Multiple currencies per report
- Enforce expense policy rules
- Employee monitors status
- Reimbursable and nonreimbursable
- Approved expenses generate payable transactions
- Search and duplicate for recurring expense
- Multiple document Approval

SOLUTION INTEGRATIONS

DIRECT INTEGRATION

- Certified for Microsoft Dynamics Business Central
- Integration links to other Cloud ERP available

ADDITIONAL FEATURES

- Advanced workflow with unlimited criteria
- Company data transfer
- Data sharing setup
- Help setup and custom configuration
- API setup to interface with other Cloud ERP products
- Web settings from web Interface instead of on the server
- OAuth Providers
- Easy to modify lookups to add columns to search and filter by
- Customizable display settings to match your companies color scheme and logos
- All service settings configurable in the web interface
- Tailored e-mail alerts
- Easily reassign documents
- Multi-currency
- User-specific menu shortcuts
- Project accounting interface
- Utility to update routing policy when you have staff turnover
- Configurable labels and messages
- View (or drill back to) attachments from Dynamics
- Approve via e-mail
- Attachments of supporting documentation
- Submit, review and approve via mobile
- Dynamic and flexible delegation options
- Scalable design sizes screens for desktop, tablet or smart phone
- Local languages

REPORTING, COLLABORATION AND CONFIGURATION

REPORTING

- Transaction based reporting
- Built-in filters
- Audit reports for transactions
- Export to Office
- Export to user friendly Excel file
- Add custom reports with the provided report writer

COLLABORATION

- Export to Microsoft Office
- Active Directory authentication

CONFIGURATION

- Structured customization framework
- SDK
- Custom business rules
- User interface modifications
- Add new fields with lookups and validation
- E-mail alert templates

COMMON CONTROLS

- Audit trails by user
- Restrict master file lookup
- Limit possible values
- Configure screens
- Budget checking
- Defined roles
- Detailed filters on all lookups
- Limit search values
- User-defined fields with validation lists
- Access rights
- Set defaults