

Purchasing MGR

For Microsoft Dynamics CRM



Purchasing for Microsoft Dynamics allows you to create Purchase Orders from CRM sales Orders, generate and follow purchase orders, manage vendors, and delivery dates. This module eloquently adds Purchasing functionality to Microsoft CRM. Part of MTC's "Enterprise" product offering of CRM to ERP functional enhancement product family.

Create POs from your CRM Sales Order Process with vendor and RFQ handling.

Add CRM Workflows to create P/O's automatically from your CRM Web Cart or sales staff CRM Order entry.

**One-Button Print & Email PO's
RFQ Vender Selection Ease
MTC's "Enterprise" Solution Family
Purchase Order Approval Process**

"Purchasing" efficiently manages your Microsoft CRM SO-to-PO Processing

Purchasing On **By Management Technology Consulting**

Purchasing Uses:

- ✓ Convert approved requisitions into Purchase Orders or RFQs with no additional data entry.
- ✓ Sr. Management appreciates its feature to Activate, Deactivate or Revise PO Bids and Purchase Orders.
- ✓ Purchasing will have more access to CRM customer sales order history.
- ✓ Eliminate paperwork, save time, save money, and increase visibility in your full business process operations.
- ✓ Purchase all your Expense Items when tied to MTC's **Expense Manager**.

Partner NFR program, OEM, and custom development available from MTC to support unique needs



Call 323-851-5008 8:00 AM to 5:00 PM
323-853-0076 5:00 AM to 8:00 AM
SalesTeam@MTCCRM.com - www.MTCCRM.com

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CRM / XRM Success

Purchasing MGR

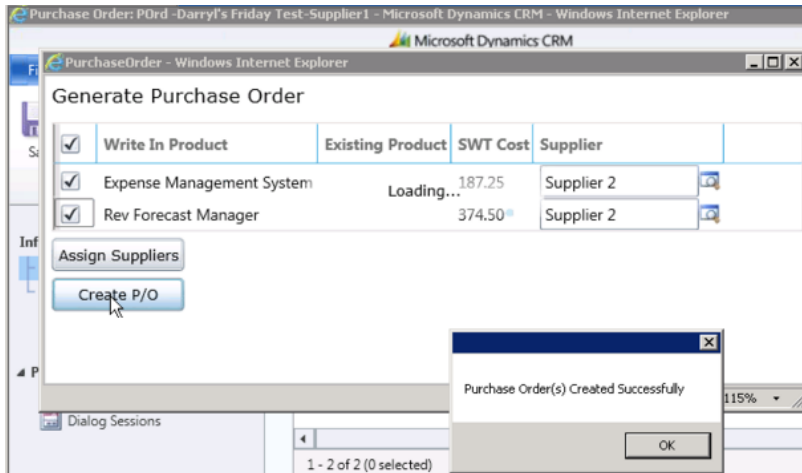
For Microsoft Dynamics CRM



Available in the Microsoft Dynamics CRM Marketplace

Easily track client-related resale items in the familiar Microsoft CRM.

Purchasing from your Sales Order View or open Sales Order allows selecting and engaging multiple vendors for any S/O line-item with fast Select All Vender selection.



Easy Request-for-Quote gets lower purchase prices in Microsoft CRM.

Request for Quote in Purchasing allows selecting and engaging multiple vendors for any P/O line-item by requesting a bid, providing specification, recording the bid and moving the successful bid to a PO for issuing.

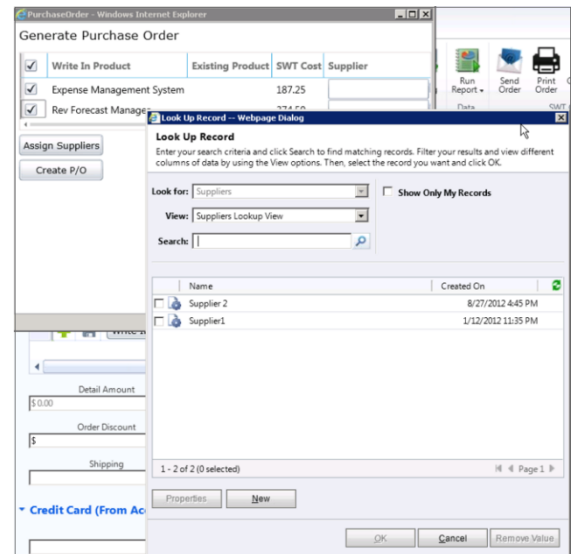
Easily track client-related item Receipts in the familiar Microsoft CRM.



When the goods are received, they are recorded and matched with issued purchase orders to complete the workflow. Allows bulk and individual Vender selection easily anywhere within the process.

Features & Benefits:

- ✓ Auto-build Purchase Orders from approved requisitions or RFQs.
- ✓ Create Purchase Order from scratch (no req or RFQ) when needed.
- ✓ Change orders, including revision numbering and tracking.
- ✓ It allows you to check budgets pre-purchase.
- ✓ One click print, email or fax quotes from Microsoft CRM
- ✓ Quotes and Purchase Orders can be copied from one Account or Contact to another
- ✓ Permits Quote or Purchase Order to be exported to Microsoft Excel
- ✓ Convert Quotes to Purchase Orders
- ✓ Quickly create Purchase orders or RFQ directly in Microsoft CRM for any vendor in the database
- ✓ Easily edit or delete line items
- ✓ Track filled and unfilled Purchase Orders and delivery dates



30 Day Trial Download Available at

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