

Requisitions

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Microsoft
GOLD CERTIFIED
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Microsoft Business Solutions
Data Management Solutions

Microsoft Dynamics™ SL

BENEFITS

- **Flexible Approval Structure**
Design a simple, one-person approval process or set up multiple layers of approvals based on your company needs.
- **Improve accuracy from the point of request**
A single point of entry for requests ensures that each requisition includes the right information. This reduces the amount of time a purchasing agent spends creating requests or tracking down lost data.
- **Reduce redundant data entry**
Enter new requests in the Item Request screen or copy line items from previously entered requests, eliminating the need for duplicate data entry. Template orders can also be established and copied to speed up the request process
- **Online approval process and notification**
Approvers can review each request online via the Business Portal and take action to approve or reject. Approvers and requesters are notified when actions need to be taken on a request via email or the communicator function in Microsoft Dynamics SL.

The Requisition module in Microsoft Dynamics™ SL provides the flexibility to address your company's procurement needs – from the relatively simple to the complex.

Manage and automate the procurement process by using an online request and approval process. Requests are entered into your Microsoft Dynamics SL system, pulling data from your Account, Vendor, Inventory and Project tables and removing the need to maintain separate systems.

Status	Purchase For *	Inventory ID	Description
1 OP	Goods For Inventory	EL-0001	Electric Motor
2 OP	Goods For Inventory	EL-0002	Vacuum Breaker
3 OP	Goods For Inventory	EL-0003	Copper Pipe 2"
4 OP	Goods For Inventory	EL-0004	Circuit Breaker Box
5 OP	Goods For Inventory	EL-0005	Circuit Breaker Panel

Item Request in Microsoft Dynamics SL

Status	Purchase For	Inventory ID	Description	Site ID	Material Type	Preferred Vendor
1 OP	Goods For Inventory	EL-0001	Electric Motor	NYC	BLKCT	
2 OP	Goods For Inventory	EL-0002	Vacuum Breaker	NYC	BLKCT	
3 OP	Goods For Inventory	EL-0003	Copper Pipe 2"	NYC	BLKCT	
4 OP	Goods For Inventory	EL-0004	Circuit Breaker Box	NYC	BLKCT	
5 OP	Goods For Inventory	EL-0005	Circuit Breaker Panel	NYC	BLKCT	

Item Request web portal view

FEATURES

BENEFITS

Flexible Approval Structure	Design a simple, one-person approval process or set up multiple layers of approvals based on your company needs. Maximum amount approval levels can be defined based on departments or projects. Additional approval policies can be defined based on the type of items being ordered. The result is a tremendous amount of flexibility to define the control and compliance structure you need while at the same time streamlining the requisitioning process for your people.
Optimized Request Process	Many companies' requisitioning processes span from paper forms to in-house systems. Their request process often requires duplicate entry into multiple systems. With Requisitions in Microsoft Dynamics SL there is one point of entry for all requests: the Item Request function. This is accessible to users on the Web, via the Business Portal in Microsoft Dynamics SL, or through the Microsoft Dynamics SL application.
Encumbrance and Budget Validation	Item request budget, actual, and committed amounts are viewable to requesters and approvers. Budgetary constraints will set off alerts or restrict requests from being processed that are over budget. This helps to enforce the desired fiscal responsibility. Upon submission for approval, the costs of the items on the requests become committed to the account or project.
Request History Automatically Maintained	A complete history of each request, including the date, time and user is stored for each request. This makes it easy to identify who requested an item and when and also who approved it.
Consolidation of Requests	Separate requests for the same vendor can be manually or automatically consolidated onto a new requisition. Combining similar requests saves on shipping and affords the opportunity of possible cost breaks through negotiations on larger orders with vendors.

For more information about Microsoft Dynamics™ SL, visit: www.synergybusiness.com or call 800.481.8590

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