Purchase & Expense Management

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Streamline Purchase and Expense Workflows with our Dynamics GP Module

In navigating the complexities of purchase and expense management, we recognise that organisations may encounter a variety of approval pathways contingent upon line managers and authorised spending limits. These thresholds may vary based on the type of form utilised.

Within Dynamics GP, the requisitioning of orders, approval of purchase invoices, processing of expense claims, and Corporate/Credit Card approvals all necessitate completion either manually or through external systems.

Users not involved in financial roles will need a certain level of Dynamics GP licence, and in some instances, full licences if they are the final approver. While third-party applications exist, connectors must be acquired to integrate data into ERP systems, which can sometimes lead to manual adjustments or even repeated data entry.

Hence, we have developed our Purchase and Expense Management module for Dynamics GP. It resolves these challenges through automated, built-in integration and offers an independent cloud-based platform for all users to input data separately from the GP system, which is entirely customisable.

Benefits to your organisation:

- Avoids the need to log in and out to access multiple companies
- Available on mobile devices
- Easy to navigate
- No need for manual signatures on paper invoices
- Full status audit trail by vendor
- One point of data entry only

- Only fully-approved transactions within Dynamics GP
- Automated reminders on approvals
- Copy function allows regular transactions to be copied and re-submitted easily
- Administration portal means that users only see the modules they have access to

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Maximising Efficiency with our Dynamics GP Purchase and Expense Management Power App:

Purchase and Expense Management Power App - key features include:

- Streamlines the entry and approval of Purchase Orders, Purchase Invoices, Expense Claims, and Corporate/Credit Card..
- Automates integration with Dynamics GP using Power Automate; stores attachments in SharePoint for ease of access.
- Features a comprehensive Power BI reporting suite and a specific Administration Portal for user management.
- Supports separate approval hierarchies and limits for Purchases and Expenses, including a "Finance Approval" workflow step for a group of users.
- Offers out-of-office settings, proxy approvers, and user-friendly expense categories with General Ledger mapping.
- Implements limits on expense categories or codes, processes non-reimbursable expenses, and sends pre-configured reminders of transactions awaiting approval.
- Allows line-level Corporate/Credit Card approval for one monthly statement to be sent to multiple approvers.
- Integrates with Dynamics GP for live data and drop-down choices of Vendor, General Ledger Account/Item and Currencies
- Provides mobile access, email notifications, and end-to-end process visibility with Dynamics GP document reference numbers.

Implementation and training for our Purchase and Expense Management module are completed within 4 days including training. This ensures only approved transactions are in Dynamics GP, with all pending documents managed in the App, enhancing operational efficiency, accessibility from any device, and reducing environmental impact by minimising paper use.

Further Advantages Include:

Powerful Reporting
Detailed Analysis by Form Type, Status, Approval History or Line Level Detail

Boosts Efficiency
Fast Expense Entry with Simplified Auditing

Saves Time
Focus More on Revenue and Less on Financial Administration

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