

Purchase & Expense Management



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Streamline Purchase and Expense Workflows with our Dynamics 365 Business Central Module



When it comes to managing your purchases and expenses, we understand that organisations can have multiple approval routes. This can often be dependent on the relevant line manager's approval limits which can differ depending on form type.

Specific users of Dynamics 365 Business Central find that although the solution does include in-built workflow functionality, it is limited. For multiple approval routes to work, non-financial users will require some level of Business Central license. Some will require full licenses if they are the last approver in the chain in order to create an approved transaction.

Third-party applications are available, however connectors have to be purchased to flow the data into ERP systems, which in some cases can require manual manipulation or even duplication of data entry.

This is why we created our Purchase and Expense Management module for Dynamics 365 Business Central as it aims to simplify this process and enable your organisation to have full auditable control over purchase-based transactions.



Benefits to your organisation:



- 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 Business Central
- 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 365 Business Central Purchase and Expense Management Power App:

Purchase and Expense Management Power App – key features include:

- Streamlines Purchase Orders, Invoices, Expense Claims, and Credit Card approvals, including Order Receipting.
- Automates integration with Business Central using Power Automate; stores attachments in SharePoint.
- 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" step.
- Offers out-of-office settings, proxy approvers, and user-friendly expense categories with General Ledger mapping.
- Implements limits on expense categories, processes non-reimbursable expenses, and sends pre-configured reminders.
- Allows line-level Corporate/Credit Card approval, integrates with Business Central for live data and order receipting.
- Provides mobile access, email notifications, and end-to-end process visibility with Business Central document reference numbers.
- Automatically generates governance over postings with default Dimensions, Priorities, or Dimension Combination logic.

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

Powerful Reporting

Detailed Analysis by Form Type, Status, and Approval History

Saves Time

Focus More on Revenue and Less on Financial Administration

Further Advantages Include:

Boosts Efficiency

Fast Expense Entry with Simplified Auditing

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