

m-hance  
with you all the way

Gold  
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## Benefits

- 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

# Purchase & Expense Management for Dynamics 365 Business Central

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.

## Powerful reporting

Provides a complete analysis by form type with any associated status, approval history or line level detail.

## Improves efficiencies

Enables expenses to be entered quickly and efficiently with all associated back up for ease of audit internally and externally.

## Saves time

Your organisation can spend more time focusing on increasing income rather than financial administrative tasks.

Our Purchase and Expense Management for Dynamics 365 Business Central module is built on a Power App which also uses Power Automate and Power BI reporting.

The module has the following features:

- It manages entry and approval of Purchase Orders, Purchase Invoices, Expense Claims, Corporate/Credit Card approvals and Order Receipting
- Automatic integration into Business Central via Power Automate
- It can store all image attachments in SharePoint for ease of access
  - A full reporting suite using Power BI
  - Specific Administration Portal for controlled user set up
- It allows for separate approval hierarchies and limits for Purchase and Expense transactions
- Option for separate "Finance Approval" workflow steps for Purchases and Expenses which can go to a group of users
  - Allows users to set their own out of office with the App
  - Enables Proxy Approvers when out of offices are set
- Use of "Friendly Expense Categories" with mappings to General Ledger coding held within background tables of the App
- Apply limits to expense categories or codes with warnings visible when limit is exceeded
  - Allows the processing of non-reimbursable expenses for full audit
  - Pre-configured reminders of transactions awaiting approval
- Line level approval on Corporate/Credit Cards allows for one monthly statement to be sent to multiple approvers
  - Pre-configured reminders of transactions awaiting approval
- Live links to Business Central for drop-down choices of Vendor, General Ledger Account/Item, currencies and Dimensions
  - Includes the ability to store multiple images and notes against a transaction
  - Facilitates the use of up to 8 Dimension codes
  - Email notifications
  - Can be used on any mobile device with a suitable connection
- Writes document reference numbers from Business Central back into the App to allow for end-to-end process reporting
- Live links to Business Central for receipting of orders, with easier to use form than in Business Central
- All Default Dimensions, Priorities or Dimension Combination logic automatically generated within the App for additional governance over postings

You can expect to be implemented with our Purchase and Expense Management module and linked to Business Central within 4 days including training. It will enable your organisation to only have approved transactions within Business Central with all "awaiting approval" documents held within the App. This means you will benefit from improved efficiency as the module can be accessed from any machine on any device. Furthermore, your impact to the environment will be reduced as less paper-based documentation is required.