

# SMB SUITE AND MICROSOFT DYNAMICS 365 FOR FINANCIALS

Financials Management | [Purchasing](#) | Inventory Management  
Sales | Project Management | Opportunity Management

# Microsoft Dynamics 365 for Financials Purchasing

- Purchase Order Management
- Vendor Management
- Vendor Item Catalog
- Purchase Line Pricing
- Purchase Invoice Discounts
- Purchase Line Discounting

# Purchasing Purchase Order Management

Record costs and track accounts payable. Minimize inventory costs and provide better customer service through dynamically updated inventory levels.

- Monitor and control your purchasing process with automated workflows
- Implement approvals for internal controls, preventing unnecessary or fraudulent purchases
- Easily modify a posted purchase invoice in your financial records and record the corrective credit memo for your audit trail.

# Purchasing Purchase Order Management

Automate tasks for vendors to record your agreements concerning discounts, prices and payment methods.

- Record and manage vendor credit terms and pricing
- Easily access agreements concerning discounts, prices and payment methods to improve profitability

# Purchasing Vendor Item Catalog

Precisely identify ordered items using vendor numbers linked to your company's internal numbers. Quickly cross-reference information plus access and store universal product codes (UPCs).

- Reduce data duplication by preserving the items list to only internal numbers
- Link multiple vendor numbers to your own internal item catalog
- Designate default vendors to specific items to auto-populate as suggested items

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# Microsoft Dynamics 365 for Financials Inventory Management

- Inventory
- Item Substitutions
- Returns and Cancellations
- Alternative Ship-top Addresses
- Shipping Agents
- Drop Shipments
- Non-stock Items

# Inventory Management Inventory

Perform basic inventory tasks quicker within receiving, selling and calculating the cost of items.

- Search for items by range of fields, including SKUs, manufacturer's part number, categories or product attributes
- Manage inventory and sales forecast using Cortana Intelligence, to accurately predict future sales and avoid inventory shortage
- Set up automated reordering based on predetermined stock levels



# Inventory Management Item Substitutions

Link items with the same or similar features so that if a customer orders an item that is unavailable, you can suggest a substitute item.

- Offer substitute items quickly and avoid lost sales
- Provide extra service to customers by offering cost-effective alternatives
- Create a hierarchy of item categories for easy filtering and navigation across related items

# Inventory Management Returns and Cancellations

Post sales credit memos and have visibility to manage customer refunds.

- Reverse and record customer refunds
- Integrated sales, G/L, inventory and cash disbursement transactions
- Eliminate recalculations for local currency conversions

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**Sales** | Project Management

# Microsoft Dynamics 365 for Financials Sales

- Sales Invoicing
- Sales Order Management
- Pricing and Discounting
- Contact Management
- Opportunity Management
- Interaction Management
- Sales Tax
- Outlook Client Integration
- Contact Classification
- Mail Logging for MS Exchange
- Dynamics 365 for Sales Integration

# Sales

## Sales Invoicing

Post sales right from Outlook, then email your invoices as PDF attachments that include a PayPal link to expedite payments.

- Minimize data entry by automatically converting quotes to sales invoices when approved
- Prepare quotes in Dynamics 365 for Financials and easily create a professional-looking document using Word forms
- Easy correction or cancellations of posted sales invoices to satisfy last-minute customer changes

# Sales

## Sales Order Management

Manage the sales cycle end-to-end, from quote generation to invoicing. Create and manage sales order quotes, sales orders and handle invoices for multiple shipments.

- Manage partial shipments more effectively
- Define multiple ship-to and bill-to addresses per customer
- Ship and invoice separately, including direct shipments and direct invoicing

# Sales Pricing and Discounting

Manage special agreements with individual customers and customer groups that include discount structures based on minimum quantities, units of measure, currencies and time periods.

- Set up invoice discounts for customers based upon defined criteria
- Automatically calculate best unit price by sales line when an order meets specified conditions

# Thank you!

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