

Core Functionality

Requisitions

- Request Stock or non-stock items or services
- Configurable Workflow
- PunchOut to Supplier Catalog
- Select from internal or external vendor catalogs
- Request for Quotes
- Vendor Portal
- Receiving
- Multiple vendors per requisition
- Auto PO Creation
- Flexible consolidation options
- Fulfill from existing inventory (GP, SL)

Invoices

- Non-PO invoices
- Check Requests
- 3-way Matching
- Vendor submits electronically
- Import vs. data entry
- Configurable Invoice specific workflow
- Real time lookup to active Vendor list
- Vendor Onboarding process
- Scan or attach invoices
- Approved invoices generates payable transactions

Expenses

- Configurable Expense Specific Workflow
- Import from Credit Card statements
- Submit expenses and receipts via smart phones
- Multiple currencies per report
- Enforce expense policy rules
- Employee monitors status
- Reimbursable and non-reimbursable
- Approved expenses generate payable transactions

Timesheets (GP/SL)

- Employees enter project hours to facilitate billing
- Enter time via mobile device or browser
- Approved timesheets create timesheets in GP/SL

Solution Integrations

Direct Integration

- Certified for Microsoft Dynamics
- Microsoft Dynamics GP
- Microsoft Dynamics SL
- Microsoft Dynamics NAV
- Microsoft Dynamics AX
- Standalone or integration links to other ERP available

Additional Features

- Advanced workflow with unlimited criteria
- Tailored e-mail alerts
- Multi-Currency
- Local Languages
- User-specific menu shortcuts
- Configurable labels and messages
- Analytical Accounting (GP)
- View (or drill back to) attachments from Dynamics
- Approve via e-mail
- Attachments of supporting documentation
- Submit, review and approve via mobile
- Dynamic and flexible delegation options

Reporting, Collaboration and Configuration

Reporting

- KPI Reporting
- Transaction based reporting
- Built-in filters
- Audit reports for transactions
- Export to Office
- SSRS

Collaboration

- SharePoint integration supported
- SharePoint Document Management Library
- Enterprise Portal
- Export to Microsoft Office
- Active Directory Authentication

Configuration

- Structured customization framework
- SDK
- Custom Business Rules
- User interface modifications
- Add new fields with lookups and validation
- E-mail alert templates

Other Integrations

- KwikTag
- Imagelink (GP, SL)
- Binary Stream Multi Entity Management and Materials Management (GP)
- WennSoft Cost and Service Management (GP)
- Encore Project Accounting (GP)
- Red Chair Project (GP)
- Olympic Systems Project Cost (GP)

Common Controls

- Audit Trails
- Restrict master file lookup
- Limit possible values by user
- Configure screens
- Budget Checking
- Defined Roles
- Detailed filters on all lookups
- Limit search values
- User defined fields with validation lists
- Access Rights
- Set defaults

Technology Stack

