

Budgeting and Purchasing



Abstract

With Budgeting and Purchasing for AppExchange, a company can tie its purchase orders directly to related invoices and budgets so it can accurately monitor how money is spent and track the complete purchasing lifecycle.

Description

Get the big picture of where your organization is spending its money with Budgeting and Purchasing. You'll be able to drill down to track the details of each purchase you make, from the moment a purchase order is created until the invoice associated with it is paid.

You can easily track expenditures to date against budgeted funds and learn how much a particular department is spending compared with other departments. With Budgeting and Purchasing, there is no reason for anyone in your organization to lose sight of how close you are to meeting your budget goals. Because all related purchasing documents are tied together, you can streamline the spending process.

Budgeting and Purchasing covers the entire purchasing lifecycle and helps you prioritize expenditures. Its trending and forecasting capabilities help you look ahead with greater assurance that future budgets will be based on fact rather than guesswork.

Highlights

Name	Description	Type
Approvals	Track who needs to approve which invoices, and the status of each approval request.	■ 🗃
Cost Center	Monitor the yearly approved budget of each cost center against actual yearly spend. See which Purchase Orders are associated with specific cost centers.	■ 🗃
Invoice	Tie an Invoice to a Purchase Order, and track the Approvals that authorize these invoices to be paid.	■ 🗃
Purchase Order	Track the lifecycle of a Purchase Order, from a purchase request to a fully-approved P.O. Associate this with a specific Cost Center and Invoices.	■ 🗃

■ = Custom Object, 🗃 = Custom Tab, ● = Custom Link, ⚡ = Custom S-Control
⌘ = Plug-In, ✕ = Composite Component

Features & Benefits

- Enables companies to manage their purchase requisitions through the process of becoming purchase orders
- Associates all purchase orders to their respective cost centers
- Ties purchase orders to approvals, vendor contracts, and invoices

Key Reports & Dashboards

Name	Description
All Spending Matrix	Cost centers by month
Cost Center Analysis	View how much each cost center has spent YTD
Spending by Vendor Type	Track vendor spending by month or by cost center
Top 10 Purchases	Track the top purchases by dollar value

Requirements

External Service	None
Salesforce.com Edition	Professional Enterprise

Specifications

Publisher	salesforce.com
Type	Native
Salesforce.com Certification	None
Pricing	Free

Budgeting and Purchasing

Screenshot

