

Procurement



Abstract

Procurement for AppExchange enables companies to standardize purchase requests, streamline purchasing processes, and gather data to support requests for preferred pricing from vendors.

Description

Many companies depend on cumbersome manual processes when it comes to purchasing everything from ballpoint pens to fleets of cars. Procurement replaces those spreadsheets and emails with a centralized repository where you can track, monitor, and analyze the purchases your organization makes. Built-in reports let you quickly see approved requisitions, preferred vendors by item, and the amount you've spent with a particular supplier.

You can track requests by purchase order, requisition number, item, requisitioner, and other key data. The Procurement dashboard lets you quickly see your requisition pipeline — broken out by department — as well as purchase order totals by week.

With Procurement, you can be sure you fully exploit your relationships with preferred vendors by tracking your purchases from them. You can consolidate each department's purchasing requests so you qualify for the largest volume discounts available and negotiate the best pricing.

Highlights

Name	Description	Type
Purchase Requisition	Purchase Requisitions empower end users to request new items, and tracks the status of their requests.	■ 🗃
Purchase Order	The Purchase Order is an order to a vendor comprised of Line Items all going to one shipping location.	■ 🗃
PO Line Item	Connector object that shows all the different Purchase Requisitions that comprise a Purchase Order.	■
Purchase Item	A catalog of your regularly purchased items.	■ 🗃

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

Features & Benefits

- Tracks purchasing processes, including requisition approval and purchase order creation
- Consolidates multiple purchase and requisition records under a single purchase order
- Lists products from preferred vendors in a purchasing catalog to support low-cost buying

Key Reports & Dashboards

Name	Description
All Open Requisitions	Which requisitions are still in the request queue?
Purchase Items by Preferred Vendor	Who are the preferred vendors for different types of items I purchase?
POs by Department	Which departments are buying what?
Vendors & POs	How much money are we spending with each vendor?
Total POs Created per Week	What are our budgeted spending trends?

Requirements

External Service	None
Salesforce.com Edition	Professional Enterprise

Specifications

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

Procurement

Screenshot



Procurement | Setup | Help | Logout
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Home | About Procurement | Purchase Requisitions | Purchase Orders | Purchase Items | Reports | Dashboards | ▶

New Task | New Purchase Requisition | New Purchase Order | New Purchase Item | Recycle Bin

Admin at Procurement
Thursday November 10, 2005

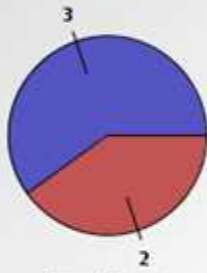
Try the AppExchange

Dashboard Refresh

As of 10/26/2005 1:09 PM Customize Page

REQUISITION ANALYSIS

Open Req Queue

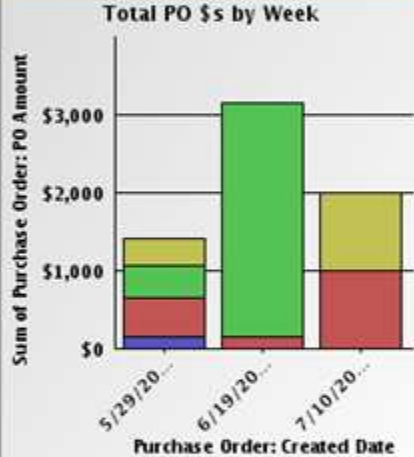


Record Count

Type	Record Count
G&A	3
Direct Cost	2

PO ANALYSIS

Total PO \$\$ by Week



Purchase Order: Created Date

Department	5/29/20	6/19/20	7/10/20
General & Admin	\$200	\$200	\$100
Sales	\$400	\$100	\$100
Research & Development	\$400	\$2,000	\$0
Packaging & Labeling	\$500	\$0	\$1,000

VENDOR ANALYSIS

Top Vendors by Open PO \$\$



Account: Account Name

Account	New	Hold	Received
Scientific	\$3,200	\$0	\$0
Office De...	\$1,000	\$1,000	\$0
San Mateo	\$500	\$0	\$1,500

Messages and Alerts

Salesforce Messages:

Take New Features Training

Your Company Messages:

Welcome to the Procurement Demo

- Manage your purchase requisitions
- Leverage volume requests for preferred pricing
- Manage a list of preferred Purchase Items

Search

Search

Advanced Search

My Tasks New

Select One: All Open

You have no open tasks scheduled for this period.