

STREAMLINE YOUR PURCHASING PROCESS WITH M365 & TEAMS



A low cost, configurable, and flexible purchasing system in Microsoft 365 and Teams can save your organization substantial time and effort while reducing costs and speeding responses.

AUTOMATE YOUR PROCUREMENT PROCESS

Microsoft 365 is an ideal platform for purchase request automation. Using forms and workflows, along with web and mobile technology, M365 and Teams can provide a comprehensive and effective purchasing system that guides the request from initiation to fulfillment.

A Microsoft 365-based system can lower costs and speed purchasing with:

- **Forms and Portals** that are friendly and adaptable to the end user.
- **Workflows** that drive the approval and fulfillment processes.
- **Notifications and Reporting** that keep everyone informed.

The flexible configuration options available in Microsoft 365 enable organizations to meet the needs of their customers, partners, and internal purchasing departments.

With Microsoft 365's native mobile and responsive cloud-based capabilities, users can interact with the purchasing system on mobile phones and laptops as well as desktops.



CREATING THE PURCHASE REQUEST

Microsoft 365's capabilities are particularly applicable during the purchase request creation process, where automation, mobile technology, chatbots, and sophisticated routing solutions enable companies to build comprehensive and engaging purchase intake processes.

Flexible, Configurable Forms

A purchase request system should, above all else, be designed around the needs of its users. This is critically important during the initial data collection stage; customers and purchasers need to easily interact with the system when defining the purchase request.

The workhorse of the purchase request process is the form. Microsoft 365 provides a range of forms creation options (such as our NITRO Studio) that make it possible to meet the needs of the purchase request initiation process.

A purchasing system should offer forms that are:

- **Easy to design** and configure based on business needs, from functionality to branding.
- **Able to access information from any source**—such as a catalog with product & pricing data or Microsoft 365 lists—while being able to integrate with existing systems such as a CRM, CMS, ERP, and/or financial system.
- **Able to access customer and user data** from Active Directory or other databases.
- **Comprehensive** enough to support a potentially complex request process (e.g., multiple approvals, multiple routing, automation techniques, mobile operability, etc.).

Get up and running quickly with NITRO Studio. In a very short time, you can be creating solutions for your organization, replacing outdated purchasing software with modern options.

Mobile Technology for Initiating Purchase Request

A purchase request system should be mobile-friendly, device-agnostic, and responsive to any display environment. Users should be able to easily submit purchase requests on their smartphones or tablets. All parties (e.g., requester, approver(s), etc.) should automatically receive notifications based on configurable trigger events.

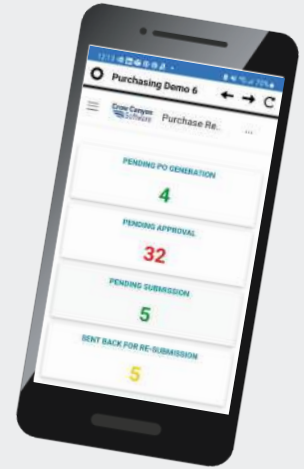
Using Microsoft Teams for Purchasing Efficiency

Microsoft Teams chatbots can be used to guide the purchasing process. The system knows who the person is based on the M365 login and the department and role of the person can easily be determined.

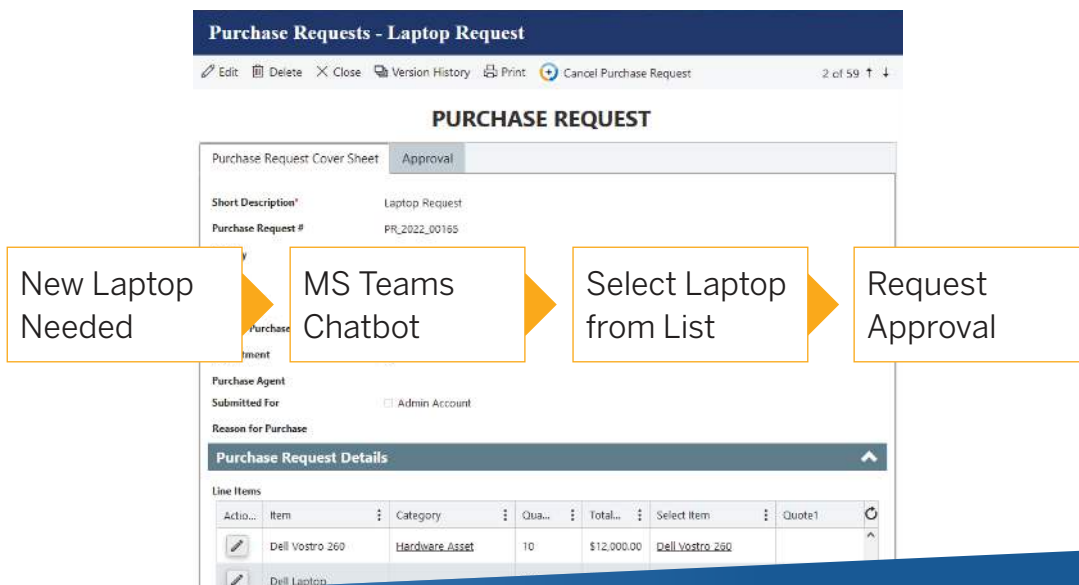
With those known factors in place, the chatbot can offer pre-defined purchasing options. Imagine this scenario:

Bill in Sales needs a new laptop. He interacts with the MS Teams chatbot simply by entering "I need to replace my laptop". The chatbot is programmed to provide Bill with a list of approved laptops for Sales personnel. Bill selects one of them and the request is then sent to Bill's manager for approval.

In this way, and many others, chatbots can guide the purchasing process and build in a comprehensive layer of efficiency. Employees can quickly get the equipment and assets they need to do their job, while working within company purchasing guidelines.



Within Microsoft 365, a purchasing program can use engaging interfaces, comprehensive workflows and actions, and tight integration with financial systems and order delivery tools to automate and streamline purchasing approvals and activities.

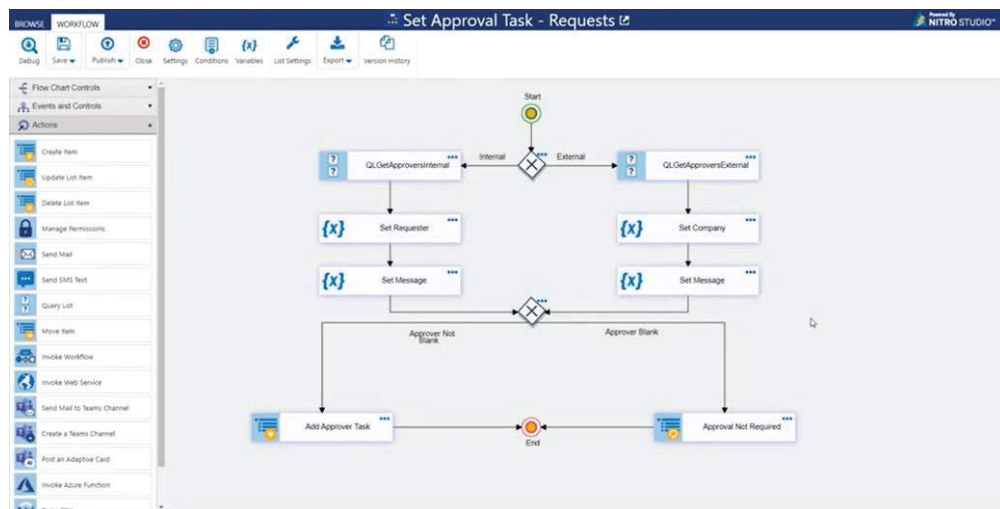


FLEXIBLE AND DYNAMIC APPROVAL WORKFLOWS

Every year, enterprises lose valuable time and waste resources using internal and external approval processes that are inflexible, lack configurability, are unreliable, or are misconfigured. This is largely due to purchase request systems that fall short of the functionality needed to address highly variable scenarios, such as multi-level approvals and conditional approval routing.

What's needed is a solution that is flexible enough to support the wide array of approval scenarios that organizations encounter on a day-to-day basis.

Once Bill submits his request whether using Forms, mobile or Teams, it needs to go through an approval process. The approval process can be as simple as receiving pre-approval or single approval (manager). Or as complex as multi-level approval based on various factors such as item, cost, location, and more.



VARYING COMPLEXITY BASED ON SIZE OF ORGANIZATION AND OTHER FACTORS

Approval routing and workflows are determined by the particular needs of the company. This could depend on size, industry, location, branches, and more. For example, smaller organizations may only require purchase request approvals from a direct manager or a division head, whereas a large enterprise is likely to require a significantly more complex arrangement.

APPROVAL WORKFLOW BASICS

Typically, small and mid-sized businesses do not require an overly complex approval process. More often than not, a purchase request is sent to the user's manager for approval and, once approved, the transition to becoming a purchase order can begin. Of course, if approvals are unnecessary, there is no requirement for purchase requests to undergo any type of approval workflow.

A purchase request system should be able to handle multiple variables when determining the approving party in a single-level scenario, such as:

- **By Name:** An approver is specified by name on the purchase request;
- **By Location:** A request may be routed to an approver based on the location of the requester. This is useful for companies with multiple geographically-dispersed offices;
- **By Purchase Type:** Approvers can be assigned to specific purchase or product types. For example, Mr. Smith is responsible for approving purchase requests for IT Hardware while Ms. Pemberton approves requests for IT Software;
- **By Role:** Requests can be auto-routed to approvers who work in a specific capacity in the organization, such as a department manager or a team leader. This enables requests to smoothly continue along an approval workflow when named parties are unavailable;
- **By Amount Spent:** Purchases exceeding a specified value may require a different approval workflow; and,
- **By Method of Purchase:** Was the purchase made online? In-person? Via an automated chatbot process? These are all factors that could be used to determine the approving party and/or workflow.

“Many organizations suffer high rates of inefficiency – order delays, wasted capital, misallocation of resources – due to improper purchasing systems.”

— Scott Restivo, CEO of Crow Canyon Software

MORE COMPLEX APPROVALS

Complex approval workflows involve multiple levels of review that are dependent on the particulars of the purchase request, such as “who, what, where, and when.” A range of individuals may be called upon to make decisions. These elements are built in to the workflow, with conditions and branching guiding where the next approval is needed and when.

This level of complexity is often required in larger enterprises when more than one party (multi-level) is involved in the approval process.

Examples of these types of workflows include:

- **Parallel Approvals:** A purchase request is sent to multiple approvers. The approval of the purchase request can be made either a) when the first approval is made by one of the recipients or b) when all recipients approve the purchase request (unanimous approval). After approval, the purchase request then moves on to the next stage, which could be another approval or a transition to a purchase order.
- **Serial Approvals:** A purchase request is sent to a series of approvers in a defined succession. This process is often combined with a criteria definition that triggers subsequent approvals if a condition is met. For example, if a laptop costs less than \$1,000, then only the employee’s direct manager needs to approve; however, if the laptop exceeds \$1,000, then the serial approval is activated and a second approval is required from the finance department.
- **Other Factors:** Automated purchase requests can also be associated with an expenditure budget whereby the cost of the requested item(s) needs to be below a certain threshold to qualify for approval. Approval workflows can be as complex as needed depending on the scenario involved — the approval routing can even be subject to the time of day when the request was lodged, which is useful in a globally distributed team scenario or to support regional office hours/holidays.

“Flexibility” is perhaps the most critical ingredient when looking for a purchase request system that can adapt to the unique business needs of an organization.

THE CHALLENGE OF PURCHASE FULFILLMENT

When a purchase request transitions into a purchase order, the success of the process typically relies on seamless product integration: procurement systems, financial systems, release management systems, asset management systems, and ERP frameworks need to work together to ensure product fulfillment.

The usage of legacy systems or inadequate purchase request systems often results in a reliance on workarounds and custom development, both of which are costly and timeconsuming.

The Process

After the final approval is submitted, fulfillment begins. The purchase request system needs to seamlessly integrate with external platforms to ensure a smooth customer and employee experience.

After approval, the purchase request becomes a purchase order. At that stage, the purchase order is typically sent to procurement to initiate fulfillment.

The purchase request system often needs to integrate with a financial or ERP platform that is capable of processing and managing the transaction.

Post-transaction, the focus shifts to product delivery. Throughout this entire process, the purchase request system should use automated notifications to keep all parties informed of the product order, from initial ordering through to delivery.

Post-delivery, customer engagement processes need to ensure customer satisfaction and potentially trigger product returns or exchanges, if needed.



A modern purchase request system needs to expertly handle the purchasing process, offering a streamlined user experience from initiation to fulfillment.

STREAMLINING THE PURCHASE PROCESS WITH MICROSOFT 365 & TEAMS

The **NITRO Purchasing** application from Crow Canyon Software addresses this complexity by streamlining the entire purchase request and order process, from beginning to end. Leveraging the power of Microsoft products, our solutions empower organizations to boost their existing Microsoft 365 and Teams to effectively configure and manage business process workflows.

NITRO Purchasing enables companies to replace paper-based systems with an electronic solution that improves speed and accountability. All activity is automatically tracked & recorded and management can view the status of requests at a glance via intuitive dashboard interfaces.

Like all of our solutions, NITRO Purchasing is highly configurable and is able to integrate with any existing financial and procurement systems. It can also be configured to work with our Asset or Equipment management solutions so that products can be automatically created as IT or equipment assets to facilitate ordering, tracking, and delivery.

Key business benefits of using our NITRO Purchasing application include:

- **Low Cost:** Leverages existing Microsoft 365 and Teams infrastructure while seamlessly integrating with existing financial and procurement systems.
- **Configurable:** Highly customizable from the ground up. Purchase request approval routing, form workflows, notifications, forms, UI/UX, and nearly all functionality is configurable based on the business's purchasing needs.
- **Flexible:** The program can engage with customers, purchasers, and employees in multiple ways. Forms can be integrated directly into Microsoft 365, Web-based, or made available on mobile devices. Data can be pulled from multiple sources, such as Active Directory and chatbots, to populate forms based on user input, role, location, etc..
- **Seamless Process:** The NITRO Purchasing application is designed to streamline the entire purchasing request & order process. Automation plays a significant role in the system — comprehensive configuration enables companies to specify exactly how dynamic forms capture highly relevant purchasing information, how requests flow through the approval process, and how they transition into purchase orders leading to product fulfillment.

CONCLUSION

Modernizing and streamlining the Purchasing processing is an important part of an organization's "Digital Transformation." By moving to more efficient operations, with the automation provided by Microsoft 365 and Teams, companies can gain substantial savings in time and costs, while doing a much better job of controlling purchase request and fulfillment.

For many businesses, it is time to forge ahead with a better purchasing system that uses the latest cloud and mobile technologies – and makes life easier for employees, customers, and everyone involved in the purchasing process.



CONTACT US TODAY!



SALES@CROWCANYON.COM



(925) 478-3110