

Agenda

FINANCIALFORCE SPEND MANAGEMENT

Minimizing Risk While Improving Logistics



- ➤ Improving decision making with Products Groups
- > Create, track, and manage data with Items Master
- How to facilitate procurement of goods with Supplier
 Catalogue Item



Vendor Accounts, Products, Items in FinancialForce

Vendor Accounts



FinancialForce SCM offers out-ofthe-box account vendor page layout to streamline the supply chain process.

Advantages

- Defaulting accounting information on vendors
- Setting up and validating supplier site for purchase order creation.

Products



Within the FFA SCM offers segmenting and categorizing items related to a different product group.

Advantages

- This assists in organizing items and selecting them when creating POs.
- Products Groups
 helps accounting process
 by predefine them.

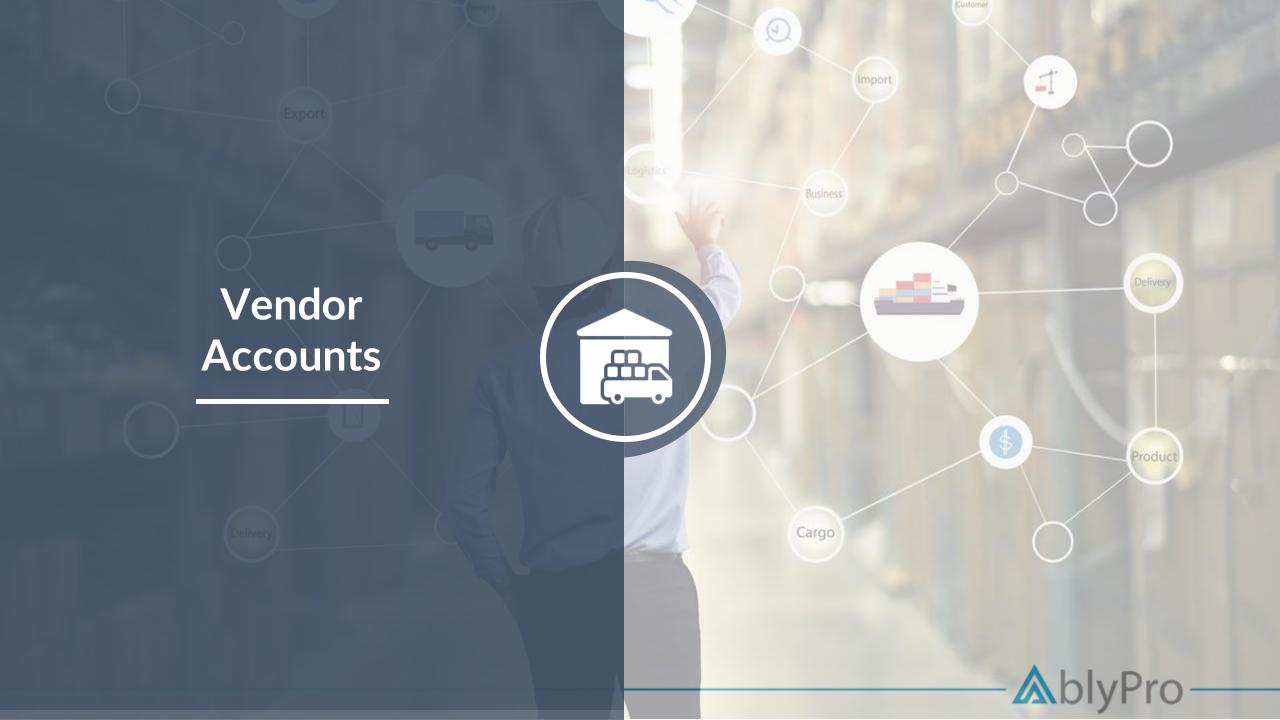
Items



Items are defined and controlled in the Master item list within the FFA SCM module.

Advantages

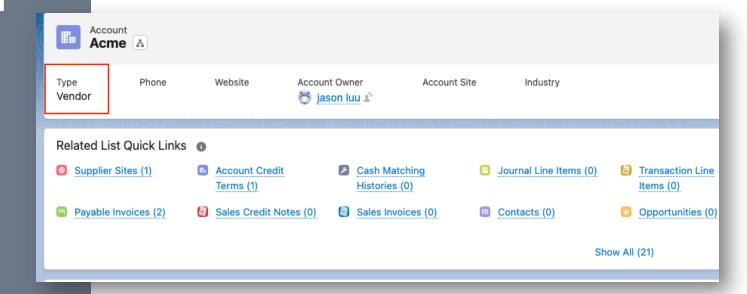
- Items can be set to active or deactivate if no longer in use.
- A supplier catalog can be set up for each item.



Defaulting Accounting Information For Vendors



By defaulting accounting information on the page layout, such as expense accounts and accounts payable accounts to a vendor, will help save time and avoid potential errors.



Accounting Information			
Reporting Code		Accounts Receivable Control	
	1		
Account Trading Currency		Accounts Payable Control	
USD		2000 - Accounts Payable	
Intercompany Account		Default Expense Account	
			1



Setting Up & Validating Supplier Site

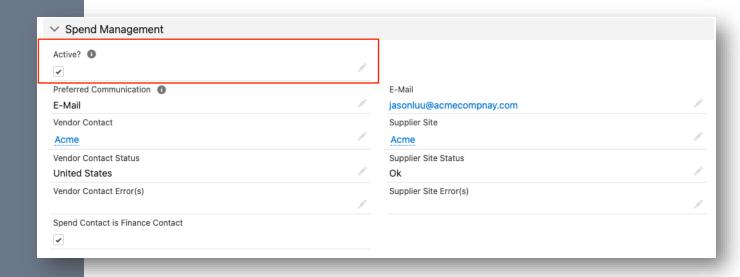


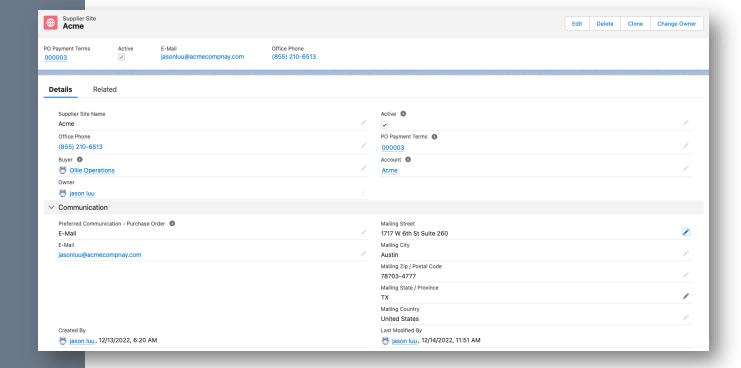
Streamline the Requisition and Purchase order creation by validating if the supplier is "Active" within the company.

Only "Active" vendors can be selected when raising a requisition or creating a purchase order.



Setting up the supplier site (Ship from location) helps pull in the address for PO creation and contact information. Also, PO credit terms can be linked to the supplier site.



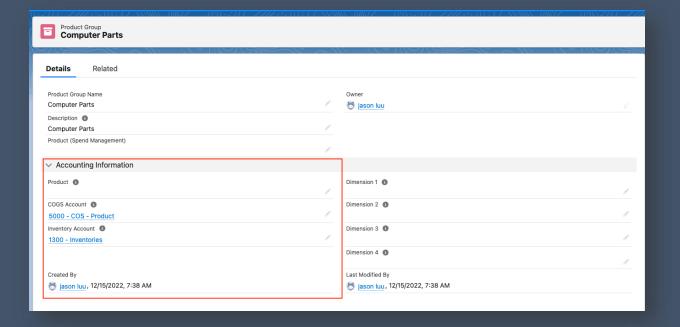


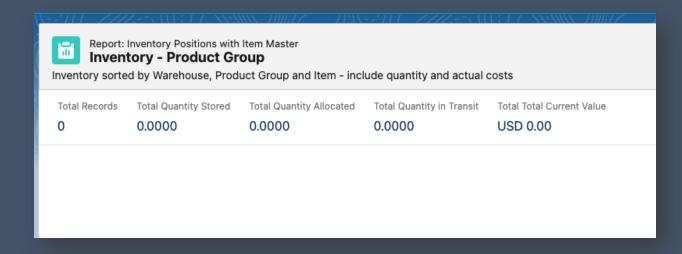


Product Groups

Product Groups are where you define accounting information, such as Inventory and COGS accounts that will be related to items.

Product Groups can be used for sales or purchasing reporting purposes. This can assist in decision-making when negotiating with vendors for items or parts contract renewal.



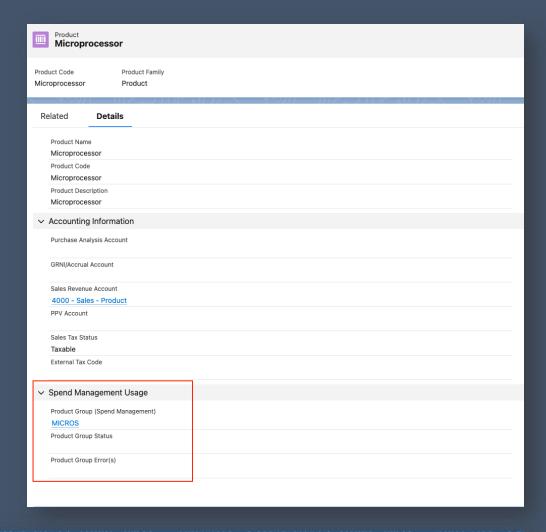




Product Groups

Product Groups can join Salesforce products and items together.

Each Product Group can have multiple items. This assists in organizing items and selecting them when creating purchase orders for a Vendor.









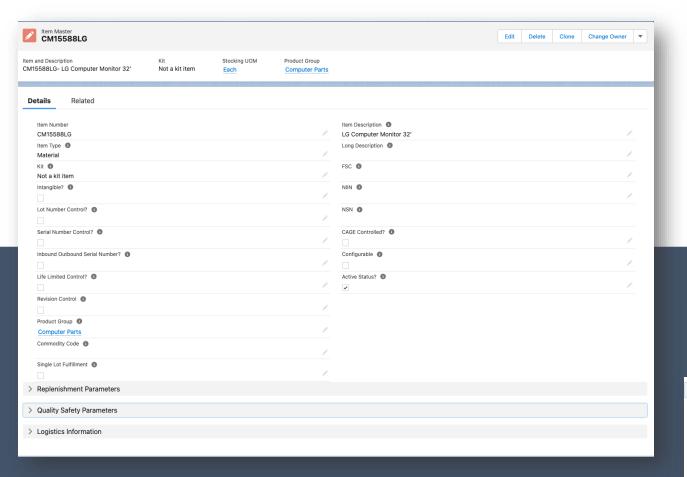
Item Masters

Items are defined within Item Master records.

Box Dimensions

Set up box dimensions for the shipping item.



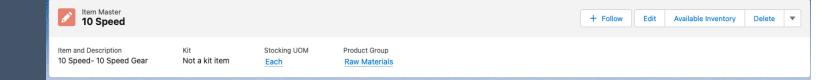


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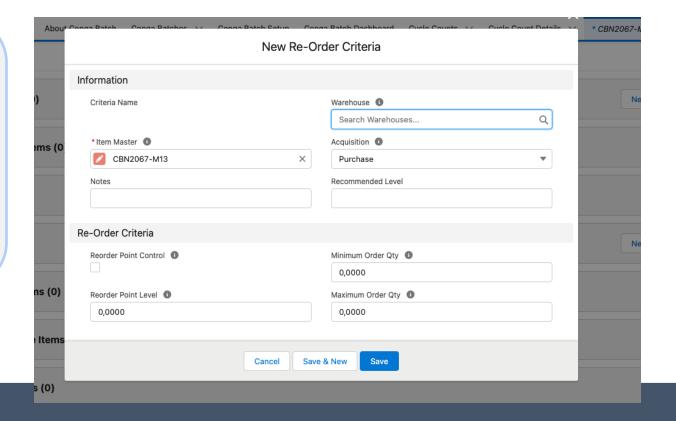
ITEM MASTER Fun Fact





With the Item Master page, there is a button that displays an Inventory page for the item. This will allow the user to see the Inventory level position.

In addition, reordering criteria can be set on an item to create requisitions for purchasing if inventory levels are low.





Supplier Catalogue Item

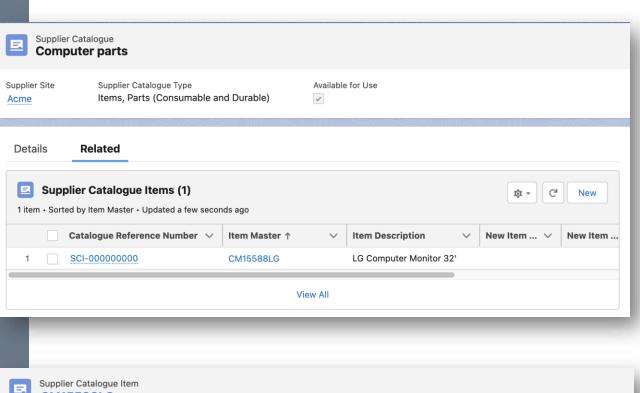


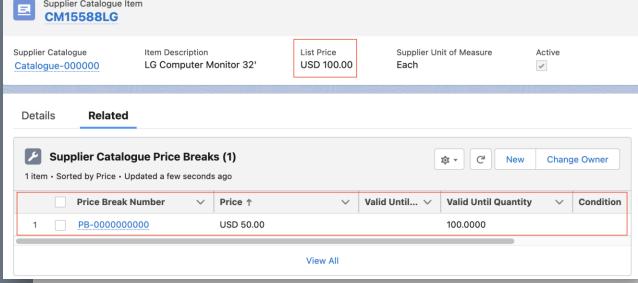
Supplier Catalogue allows users to link multiple items to a selected supplier.



Price breaks can be set on an individual item within the supplier catalogue.

For example, if you are buying a certain item in a large quantity, bulk pricing can be made available by the supplier.





HAVE ANY

QUESTIONS?



Contact Us

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