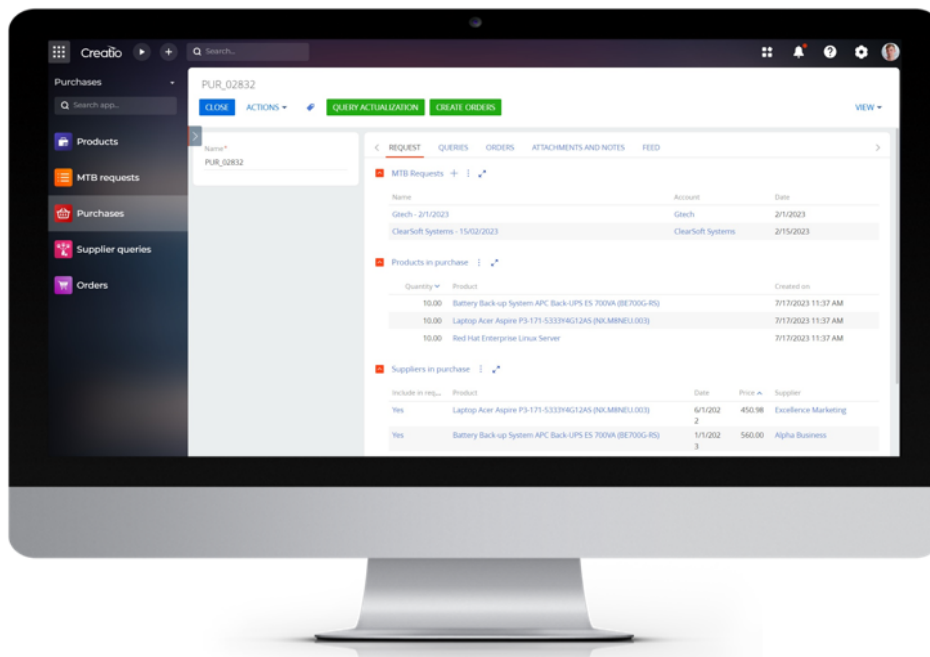




SALES'UP PROCUREMENT MANAGEMENT FOR CREATIO



Guide to setup and utilization

21.11.2023

CONTENTS

Product description	3
Use cases	3
Key features.....	3
Technical requirements	3
Product installation and setup	4
Product installation	4
General settings	6
Adding a new MTB request	7
Purchase formation.....	8
Working with the “Supplier Requests” section	13
Order preparation from Purchases	16

Product description

The **Sales'Up Procurement Management for Creatio** product allows you to manage the full cycle of a company's purchases – from creating an application within the company to choosing the most favorable conditions among product suppliers, quickly receiving up-to-date information about the product, and automatically generating an order based on the received data.

The product is suitable for any type of company that regularly purchases products from different suppliers, helping to automate and simplify the process of interaction between the company and the supplier.

Use cases

- Management of the purchase cycle from the creation of a purchase request within the company to the creation of an order to a product supplier;
- Building convenient communication between the company and suppliers;
- Management of the process of selecting the best conditions for products and suppliers;

Key features

- Automation of the company's purchase cycle management process;
- Creation of a unified info base for managing purchase requests within the company;
- Building and managing communication between the product supplier and the company;
- Automatic creation of purchases from suppliers from generated requests;
- Storage and analysis of the history of prices for products of suppliers;
- Convenient sorting by price and payment terms of the product among several suppliers to select more favorable terms;
- Ability to quickly and conveniently receive up-to-date information from the supplier on the availability of products, price and terms of payment;
- Convenient sorting of data received from the supplier for automatic order formation;
- Automatic creation of one or more orders from different suppliers, taking into account the terms of payment and delivery.

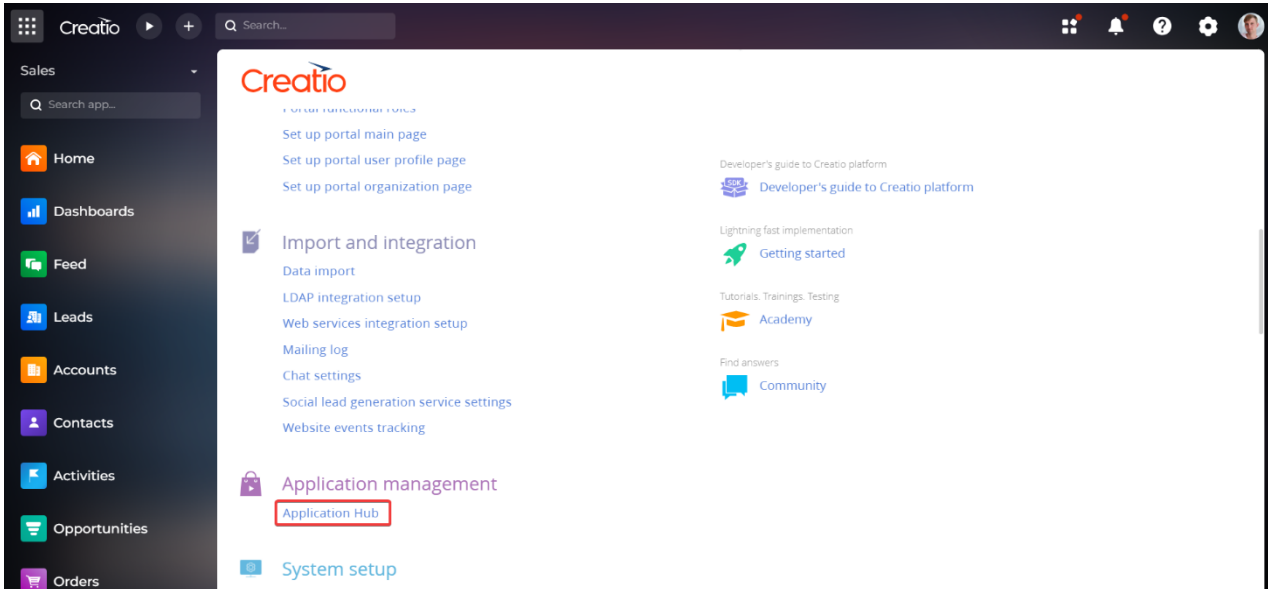
Technical requirements

The product is compatible with products on the Sales Creatio platform version 7.16.0 and higher.

Product installation and setup

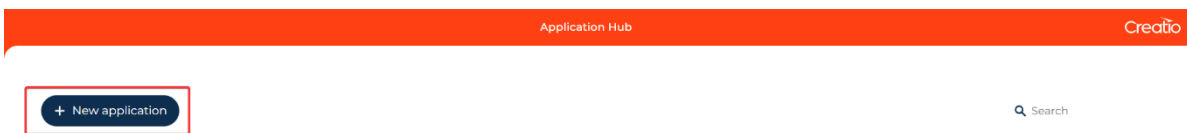
Product installation

To install packages, click the  button and go to the "Application Hub".

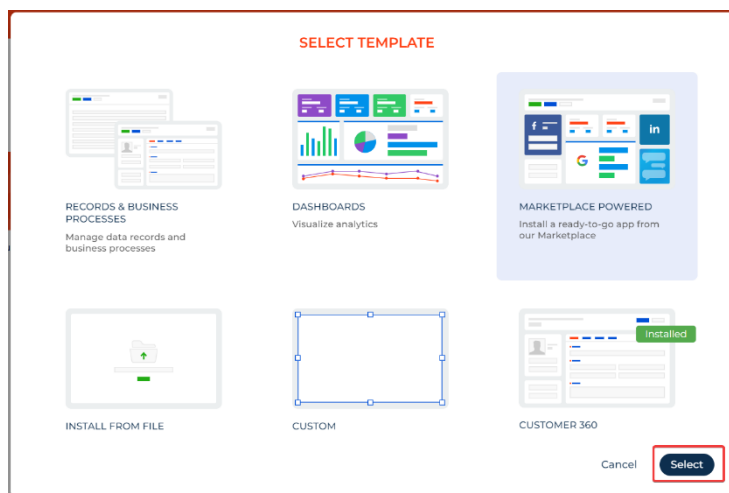


Next, go to the "Application Hub" section.

On the "Application Hub" page, click "New application",



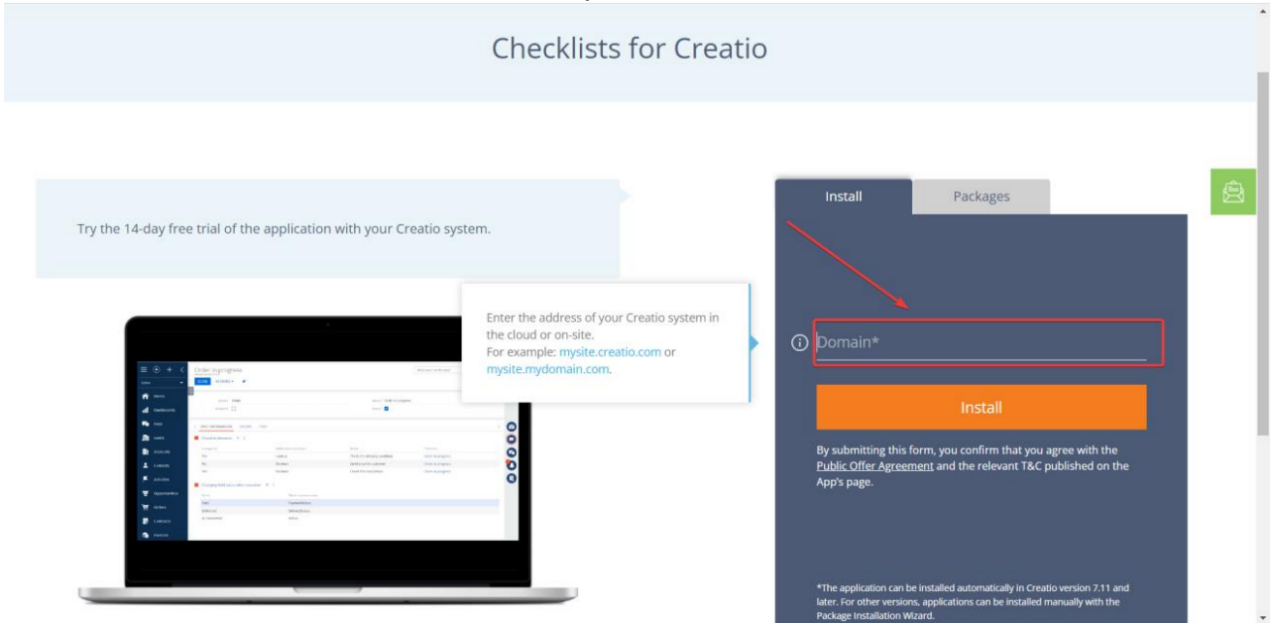
Select the "Marketplace powered" block and click the "Select" button.



Click the "Install" button on the product page.

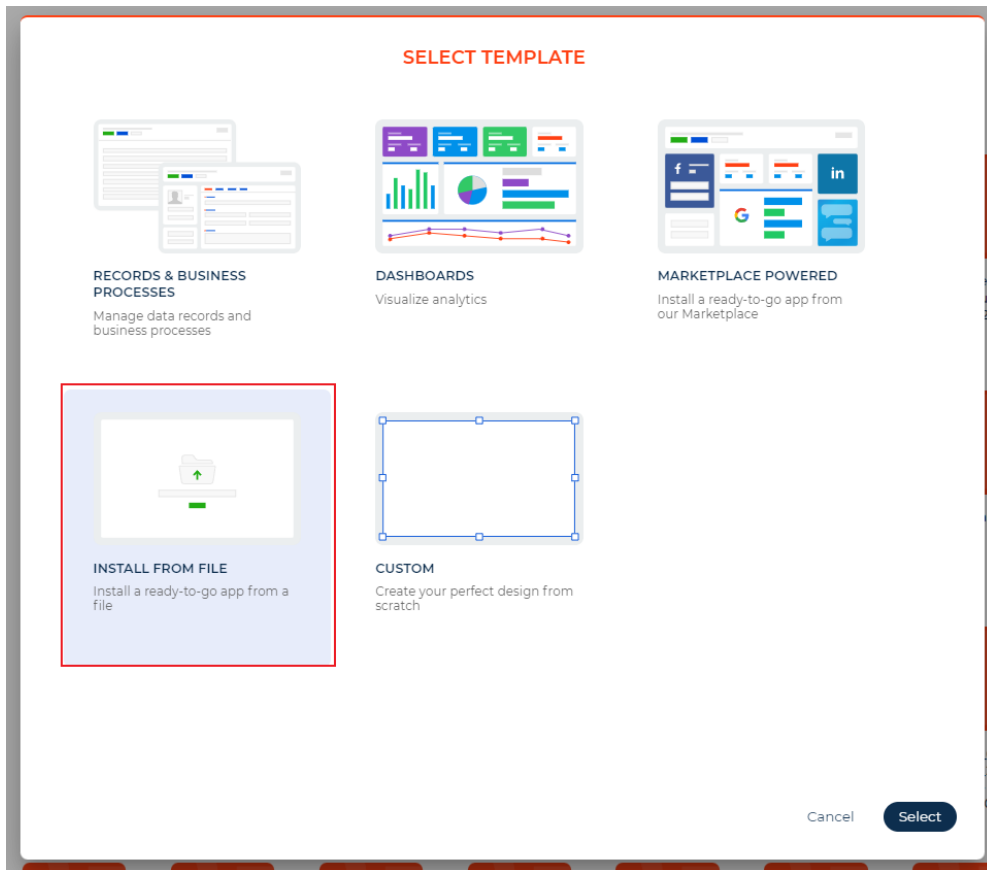


Enter the address of the Creatio website where you want to install the product.




After the installation is complete, the Creatio website login page will open.

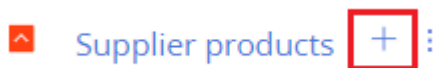
If you are installing a product package from a file, you need to [request the latest package from Sales'Up support](#). Next, on the "Application Hub" page, click "New Application" and select "Install from file", specify the path to the archive with the package and install it.



General settings



Before starting the formation of an order, it is necessary to add the products provided by the supplier to the "Supplier's products" details of the account card.

To do this, go to the "Accounts" section, open the page of the account of the good's supplier and add products to the detail by clicking on the button 



Select the products from the registry and press

Go to the added record's page on a detail by double-clicking on it.


 Supplier products  :

Actual	Product	Supplier
Yes	VC Cordless Mice Type	TM "BENEFIS"

On the detail record page that opens, fill in the supplier's price history for the "Supplier Price History" detail.

Supplier purchase history 


Product	Price	Payment term	Date	Supplier
VC Cordless Mice Type	500.00	30% prepayment/complete delivery	10/17/2022	Customer Accom-Westhouse Company
VC Cordless Mice Type	470.00	50% prepayment/complete delivery	10/18/2022	Customer Accom-Westhouse Company
VC Cordless Mice Type	450.00	50% prepayment/50% delivery	10/11/2022	Customer Accom-Westhouse Company
VC Cordless Mice Type	400.00	100% prepayment	10/13/2022	Customer Accom-Westhouse Company

After clicking the button  on the page that opens, fill in the fields:

1. Supplier – an account for which products were previously purchased;
2. Terms of payment – the terms of payment on which the products were purchased;
3. Product – which was purchased from a supplier;
4. Price – the price of the product at which it was purchased;
5. Date – the date of purchase of the product at the specified price.

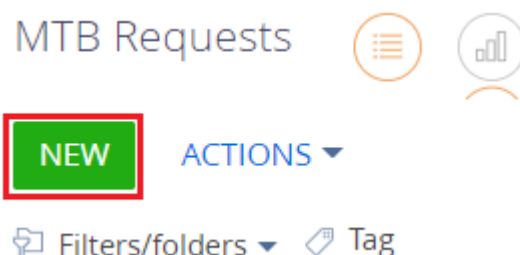
Supplier Customer Accom-Westhouse Company Product VC Cordless Mice Type
Payment term 50% prepayment/50% delivery Date 10/11/2022 Price 450.00



After clicking the  button, the record will be added to the "Purchase history from the supplier" detail.

Adding a new MTB request

To add a new request for goods and materials, go to the "MTB requests" section and click the "New" button



On the page that opens, fill in the required and optional fields:

Name – the name for the new MTB;

Account – the counterparty for which the order is being created;

Author – automatically filled in with the value of the current user who created the request;

Purchase – unavailable for editing, filled in automatically when adding MTB requests to the purchase;

Type – the default type is "Purchase request";

Date - the date of the MTB request.

SAVE CANCEL ACTIONS VIEW

Name* - Purchase
 Account Type Purchase request
 Author Stasia Henrickson Date

Add the required products to the request for the details "Products by request"

Axiom - 7/17/2023
 CLOSE ACTIONS VIEW

Name* Axiom - 7/17/2023 Purchase
 Account Axiom Type Purchase request
 Author Stasia Henrickson Date 7/17/2023

MAIN INFORMATION FEED
 Products by request +

On the page that opens, fill in the fields:

Product – the product to be added to the request;

Unit – the unit of measure of the product (for example, "pieces");

Currency – in which the payment for the product will be made;

Price – the price at which the company is ready to purchase the product from the supplier;

Total - calculated automatically by the formula = Price * Quantity;

MTB request are filled in automatically with the value of the current MTB request

Gtech - 2/1/2023 / Products by request
 CLOSE ACTIONS

Product* Red Hat Enterprise Linux Server MTB Request Gtech - 2/1/2023
 Unit* pieces Currency US Dollar
 Price 1,896.00 Quantity 10.00 Total 18,960.00

Purchase formation

To form a purchase based on the created MTB request, go to the "Purchases" section and click the "Add" button.

Purchases



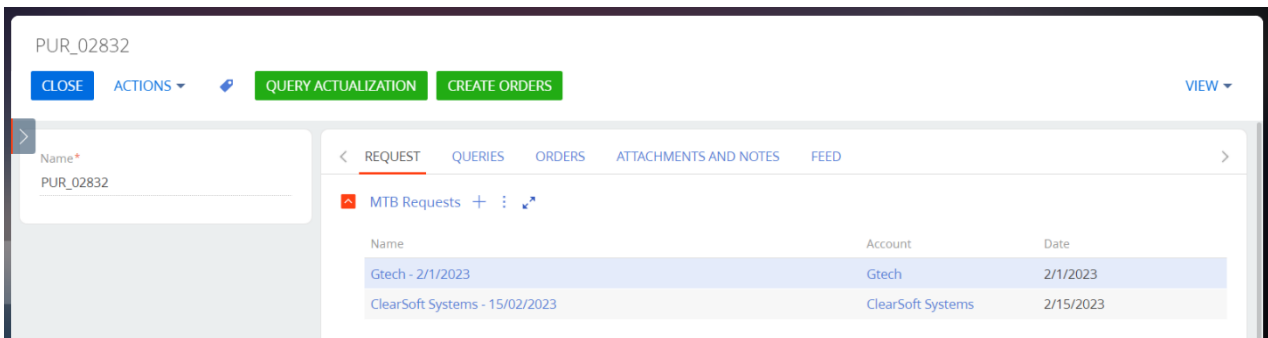
ACTIONS ▾

Filters/folders ▾

Tag

On the opened page of the purchase, specify the name of the purchase and click "Save".

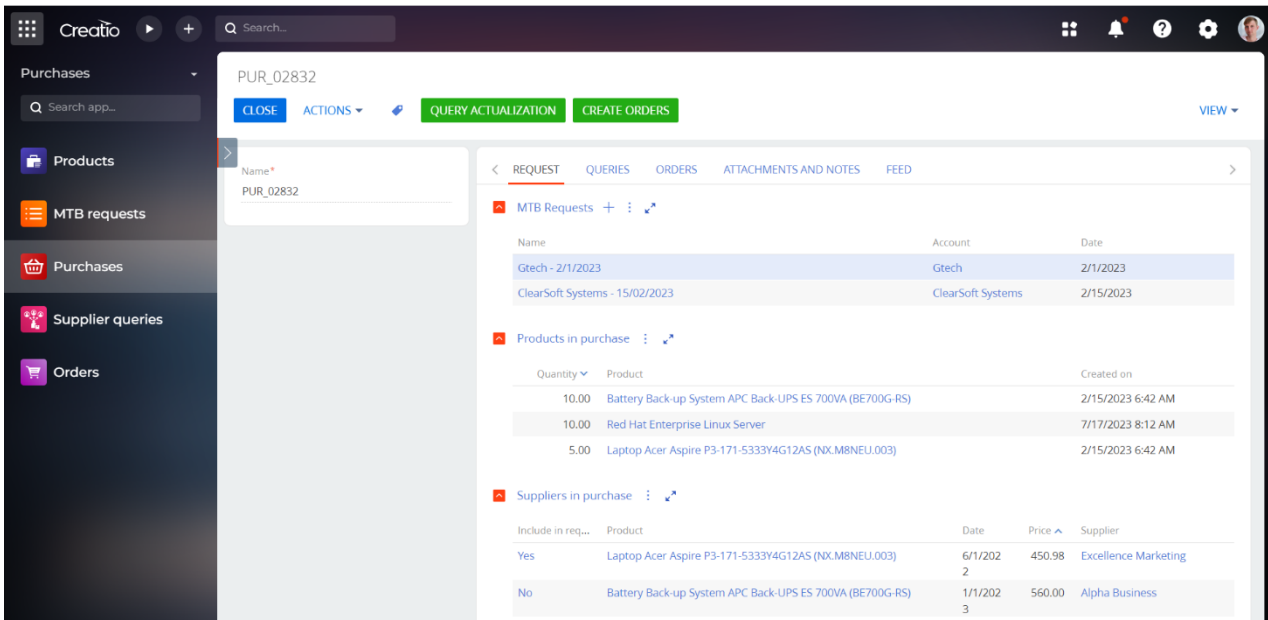
Go to the created purchase and on the "Requests" tab, click "+" on the "MTB requests" detail



Note: only those MTB requests that have not previously been used in the purchase are available for selection.

After selecting MTB request, records with products from the selected MTB requests are automatically added to the "Products in Purchase" detail, as well as records with suppliers that supply the selected product, the last actual price for the product and date of updating the price of the product.

Note: Only the most recent current price is pulled up for the "Suppliers in Purchase" detail.



If more than one Request for the "MTB requests" detail is added to the Purchase and both Requests contain the same product, the total quantity for the product from all requests will be displayed on the "Products in Purchase" detail.

To detail the quantity of a product for each of the requests, when you double-click on the record of the “MTB requests” detail, the quantity of the product specified in the selected request will be displayed on the “Products in Purchase” detail.

REQUEST															
REQUEST	QUERIES	ORDERS	ATTACHMENTS AND NOTES												
<div style="display: flex; justify-content: space-between; align-items: center;"> MTB Requests + ⋮ ↻ </div> <table border="1"> <thead> <tr> <th>Name</th> <th>Date</th> <th>Account</th> <th>Author</th> </tr> </thead> <tbody> <tr> <td>Request 1</td> <td>10/7/2022</td> <td>Customer / 4</td> <td>Supervisor</td> </tr> <tr> <td>Request 2</td> <td>10/7/2022</td> <td>Customer / 4</td> <td>Supervisor</td> </tr> </tbody> </table>				Name	Date	Account	Author	Request 1	10/7/2022	Customer / 4	Supervisor	Request 2	10/7/2022	Customer / 4	Supervisor
Name	Date	Account	Author												
Request 1	10/7/2022	Customer / 4	Supervisor												
Request 2	10/7/2022	Customer / 4	Supervisor												
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Product	Quantity	Unit	Created on												
Dell Vestro 5510 (N709)	65.00	pieces	10/7/2022 2:00 PM												

To display information about the price of a product from different suppliers, when you double-click on the entry of the “Products in Purchase” detail, the price history for the selected product from different suppliers is displayed on the “Supplier Price History” detail.

Products in purchase

Product	Quantity	Unit	Created on
CE Blue Microphone Type	50.45	pieces	10/20/2022 1:09 PM
China Video Collaboration Type	40.00	pieces	10/20/2022 1:09 PM
Dell Vestro 5510 (N709)	145.00	pieces	10/20/2022 1:09 PM

Suppliers in purchase

Include in request	Purchase	Supplier	Price	Date
No	Purchase "Benefis"	Customer / 4	650.00	9/1/2022
Yes	Purchase "Benefis"	Customer Accom-Westhouse Company	620.00	9/22/2022

Supplier purchase history

Price	Date	Product	Supplier
600.00	8/1/2022	Dell Vestro 5510 (N709)	Customer / 4
625.00	8/15/2022	Dell Vestro 5510 (N709)	Customer / 4
620.00	9/1/2022	Dell Vestro 5510 (N709)	Customer / 4
665.00	7/1/2022	Dell Vestro 5510 (N709)	Customer / 4
620.00	9/22/2022	Dell Vestro 5510 (N709)	Customer Accom-Westhouse Company
650.00	9/1/2022	Dell Vestro 5510 (N709)	Customer / 4

And when you double-click on the record of the "Suppliers in Purchase" detail, the price history for the selected product from the selected supplier is displayed on the "Price history from the supplier" detail.

MTB Requests

Name	Date	Account	Author
Request 1	10/7/2022	Customer / 4	Supervisor
Request 2	10/7/2022	Customer / 4	Supervisor

Products in purchase

Product	Quantity	Unit	Created on
CE Blue Microphone Type	50.45	pieces	10/20/2022 1:09 PM
China Video Collaboration Type	40.00	pieces	10/20/2022 1:09 PM
Dell Vestro 5510 (N709)	145.00	pieces	10/20/2022 1:09 PM

Suppliers in purchase

Include in request	Purchase	Supplier	Price	Date
No	Purchase "Benefis"	Customer / 4	650.00	9/1/2022
Yes	Purchase "Benefis"	Customer Accom-Westhouse Company	620.00	9/22/2022

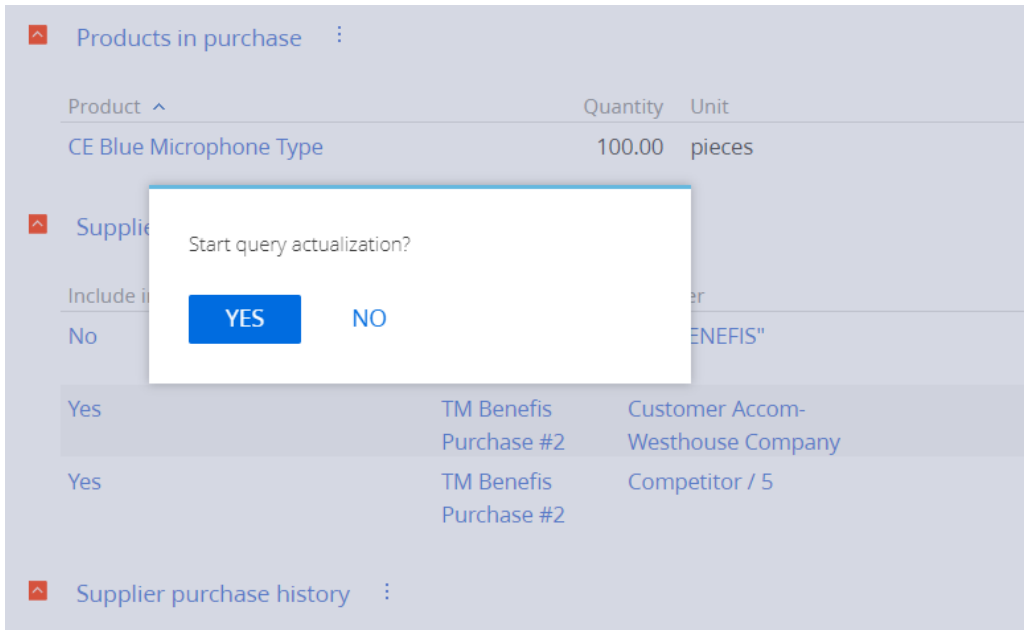
Supplier purchase history

Price	Date	Product	Supplier
620.00	9/22/2022	Dell Vestro 5510 (N709)	Customer Accom-Westhouse Company

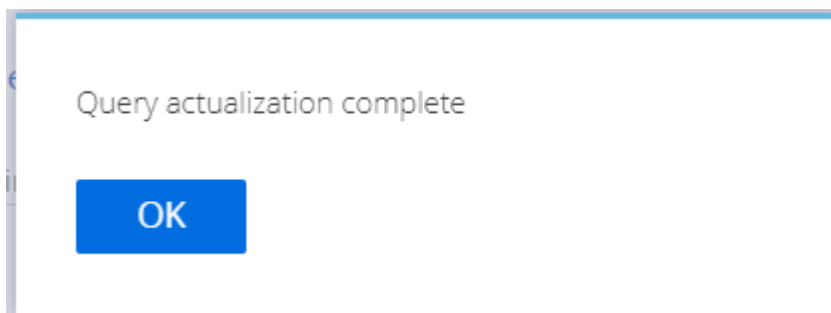
In order to update the request for the supplier to purchase the specified product and its quantity at the required price, on the "Suppliers in Purchase" detail, the user selects the supplier with the most favorable last price and changes the "Selected" flag to "Yes" on the detail record.

Then click the "Query actualization" button.

The system displays a modal window with the question "Start query actualization?"



Upon completion of the update, the system informs the user about the completion of the update.



As a result, a new request for products and their quantity was created for the supplier with a price at which the company wants to purchase products.

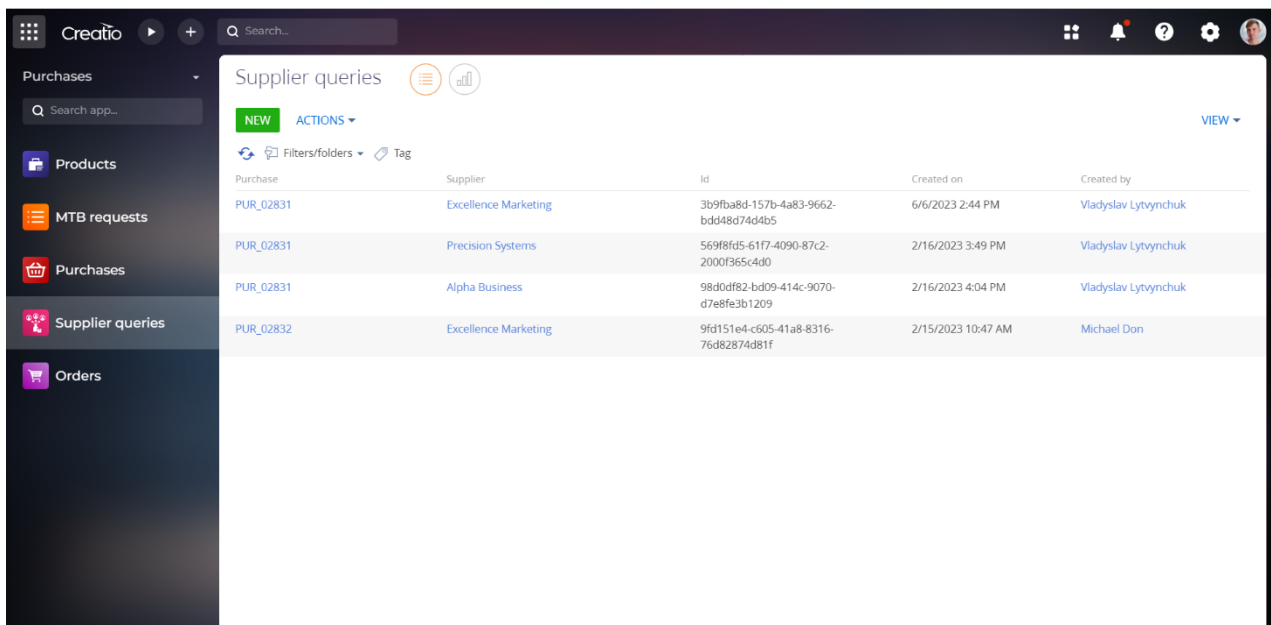
On the Requests tab, entries are automatically added for the Requests to supplier and Product in request details.

Number	Notes	Procurement	Supplier
REQ-15		TM Benefis Purchase #2	Customer Accom-Westhouse Company
REQ-8		TM Benefis Purchase #2	Competitor / 5

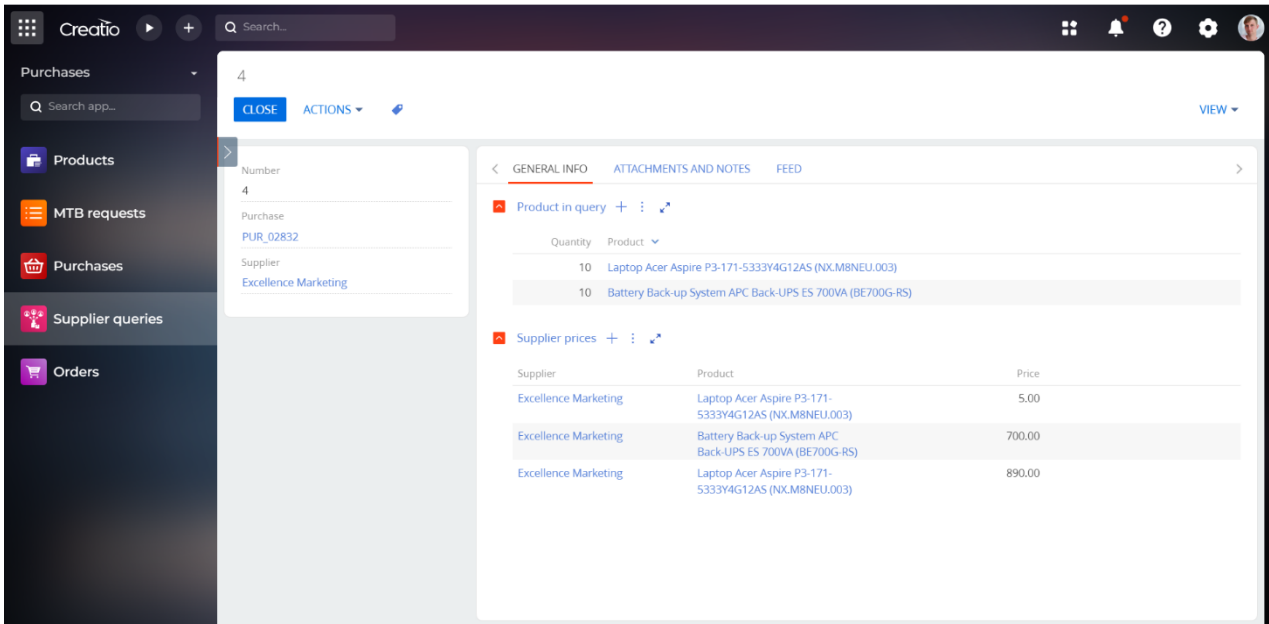
Unit	Quantity	Supplier request	Product
pieces	95	REQ-15	CE Blue Microphone Type
pieces	95	REQ-8	CE Blue Microphone Type

Working with the “Supplier Requests” section

After updating the request to the supplier, a new record with the request is added in the "Supplier Requests" section.



The “Product in Request” detail displays a record with the products for which the request was created.

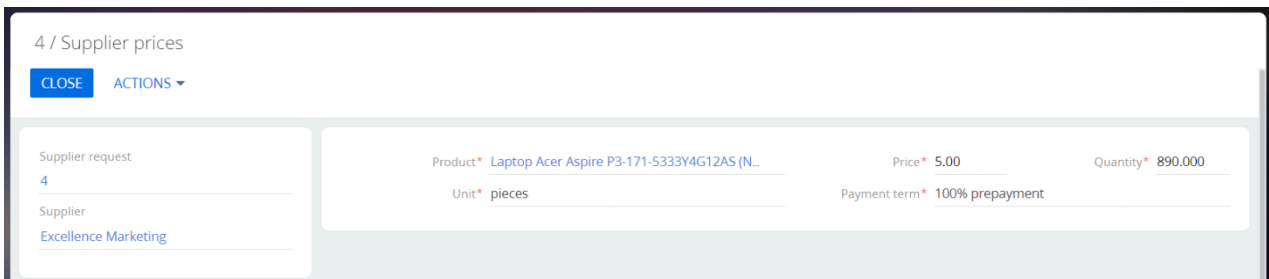


The "Supplier's prices" detail displays a record with the last actual price at which products were supplied, payment terms and the quantity of products supplied.

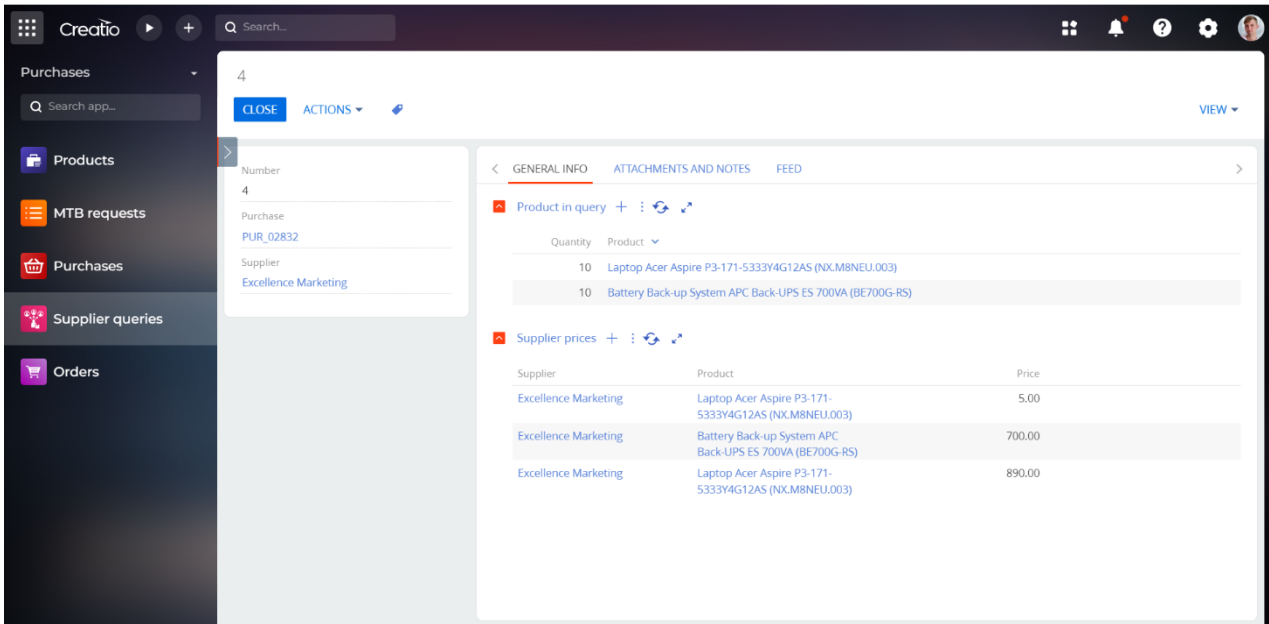
A supplier can add a record to a part with information about the number of products it can supply, the current price of the product, and payment terms.

To do this, click "+" on the "Supplier Prices" detail and fill in the required fields on the page that opens:

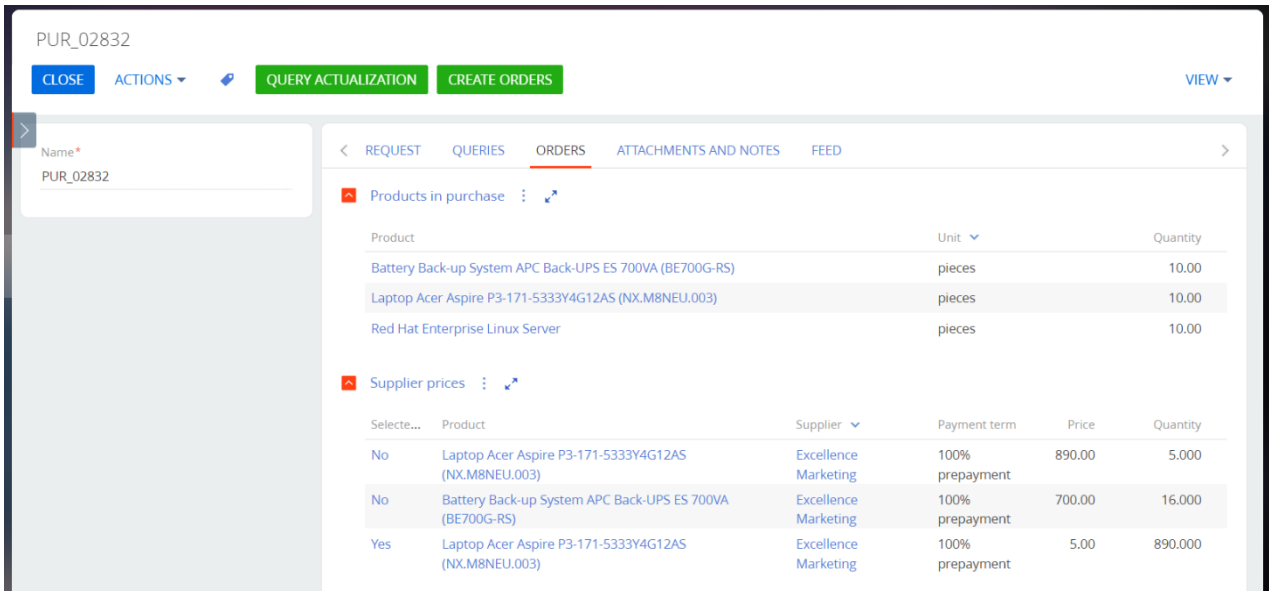
- Product;
- Price;
- Quantity;
- Unit of measurement;
- Terms of payment.



After saving a new record, information with the current price, quantity and terms of payment will be displayed on the "Supplier prices" detail



and the "Orders" tab of the "Purchases" section.



If the supplier has specified different prices and payment terms for a particular product, select one of several options offered by the supplier for placing an order by indicating the details of "Supplier prices" on the "Orders" tab in the "Purchases" section on the corresponding record.

Include in request	Purchase	Supplier	Price	Date
No	TM Benefis Purchase #2	TM "BENEFIS"	0.00	
Yes	TM Benefis Purchase #2	Customer Accom-Westhouse Company	115.00	10/23/2022
Yes	TM Benefis Purchase #2	Competitor / 5	90.00	9/1/2022

Order preparation from Purchases

To prepare an order from the "Purchases" section, select the necessary products by checking the "Yes" sign next to the corresponding records of the "Supplier prices" detail and click the "Create orders" button.

The screenshot shows the PUR_02832 interface. At the top, there are buttons for 'CLOSE', 'ACTIONS', 'QUERY ACTUALIZATION', and 'CREATE ORDERS'. Below this, there's a 'Name*' field containing 'PUR_02832'. The main area is divided into two sections: 'Products in purchase' and 'Supplier prices'. The 'Products in purchase' section lists three items: 'Battery Back-up System APC Back-UPS ES 700VA (BE700G-RS)', 'Laptop Acer Aspire P3-171-5333Y4G12AS (NX.M8NEU.003)', and 'Red Hat Enterprise Linux Server'. The 'Supplier prices' section shows two rows for the laptop product, with the second row checked 'Yes'.

Product	Unit	Quantity
Battery Back-up System APC Back-UPS ES 700VA (BE700G-RS)	pieces	10.00
Laptop Acer Aspire P3-171-5333Y4G12AS (NX.M8NEU.003)	pieces	10.00
Red Hat Enterprise Linux Server	pieces	10.00

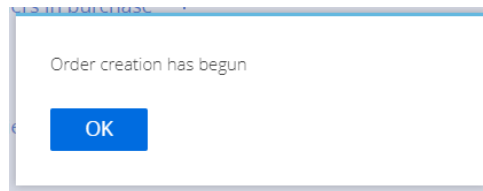
Select...	Product	Supplier	Payment term	Price	Quantity
No	Laptop Acer Aspire P3-171-5333Y4G12AS (NX.M8NEU.003)	Excellence Marketing	100% prepayment	890.00	5.000
Yes	Laptop Acer Aspire P3-171-5333Y4G12AS (NX.M8NEU.003)	Excellence Marketing	100% prepayment	5.00	890.000

Note: Orders are created for each product + payment terms (per supplier)

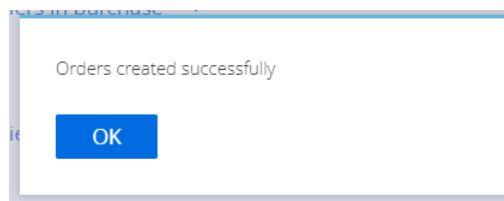
For example: if 9 products are requested for one supplier, and 5 of them have the same Payment Terms, and the other 4 have different Payment Terms, then 2 orders for one supplier will be created.

Payment terms will differ - this means that a step of the delivery and payment schedule is automatically created in orders, according to the specified Payment Terms on the "Supplier Prices" detail

After clicking the "Create orders" button, the system will display a modal window with the information that the creation of orders has begun,



when orders are formed, the system will inform about it.



A record with the order created from the purchase will be added to the "Orders in Purchase" detail.

Order in purchase		
Number	Account	Date
ORD-Excellence Marketing - 7/17/2023 11:42:08 AM- 223	Excellence Marketing	7/17/2023 11:42 AM

As a result, a new order will be created with the selected products, their quantity and price.

Product	Price	Quantity	Unit of measure	Discount, %	Total	Amount
Laptop Acer Aspire P3-171-5333Y4G12AS (...)	5.00	890.000	pieces	0.00	4,450.00	4,450.00

Items: 1 Total: \$ 4,450.00

Terms of payment will also be transferred to the order.

Type	Stage	Deferment (days)	Due date	Actual date	%	Products	Expected amount	Actual amount	Invoice
Payment	Complete payment	0	7/17/2023		100.00	1 product	4,450.00	0.00	
Delivery	Complete delivery	1	7/18/2023		100.00	1 product	4,450.00	0.00	

Further work with Orders is provided according to the basic process of working with orders.

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