

## A Medical Device Manufacturer

# Transforming Indirect Procurement with Dynamics 365



### About the Company

A global healthcare manufacturer specializing in sutures, ophthalmic products, biopsy instruments, wound closure, and specialty surgical consumables; headquartered in Westwood, Massachusetts, with 2,500 employees and ~\$500M annual revenue.

### Industry

Medical  
Devices &  
Healthcare  
Manufacturing

### Workforce

**2,500+**

### Presence

**North  
America,  
Europe, Asia**

### Service



D365 Finance &  
Operations  
(D365 FO)



Procure-to-Pay  
Automation



Guided Buying  
& cXML  
Punchout



Approval  
Workflows



Vendor  
Collaboration



Docentric  
Enhancements



Catalog  
Integration



Compliance  
& Controls



Training and Go-  
Live Support

## Solution

### Procure-to-Pay Automation

Automated PR → PO conversion with three-way matching and receipt automation to eliminate manual effort and delays.

01

### Vendor Collaboration & Communication

Automated PO dispatch using Docentric dynamic emails and a vendor notes entity for bulk delivery terms and PO customization.

03

### Guided Buying & Catalog Integration

External catalog purchasing via cXML punchout, reducing master data maintenance and standardizing requisitions.

02

### PO Document & Email Customizations

Configurable Terms & Conditions hyperlink in PO print, header/footer fields for vendor-specific notes, and dynamic subject/body placeholders with PO number/date.

04

### Policy & Workflow Enforcement

Redesigned workflows enforcing category-based approvals to unify direct and indirect procurement and close compliance gaps.

05

## Results and Outcomes

- Faster procurement cycles through automated PR → PO workflows.
- Reduced master data workload via catalog-based purchasing.
- Zero compliance violations with enforced category workflows.
- Improved vendor collaboration and timely acknowledgments via automated PO communications.
- Higher procurement efficiency and accuracy across the process.
- Real-time procurement visibility and spend analysis dashboards.
- Increased supplier satisfaction through consistent, transparent communication.