



Accelerate Business

What Sets Us Apart

DynaTech's Competitive Advantage

Backed by years of expertise and a team of skilled professionals, DynaTech Systems stands at the forefront of the IT services industry. Our extensive portfolio includes cutting-edge solutions in cloud, ERP and CRM implementation, data analytics, artificial intelligence, and more.

We prioritize long-term partnerships built on collaboration and trust, delivering innovative, scalable, and secure solutions to keep our clients ahead in a rapidly evolving landscape.



150+

Global Projects

100+

Happy Clients

450+

Expert Minds

Microsoft Cloud Capabilities



Cloud



Azure
Infra



Azure
Services



Logic
Apps



Service
Bus



Functions



Event
Grid



API
Management



Synapse
Analytics



Load
Testing



Data
Factory



Business Applications



Marketing



Sales



Finance



SCM



Commerce



Customer
Service



Field
Service



Finance &
Operations



Project
Operations



Human
Resources



Low Code



Power
Pages



AI
Builder



Power
Apps



Power
Automate



Copilot
Studio



Data & BI



Fabric



Dataverse



Power BI



Customer
Insights



OneLake



Data
Engineering



Copilot



Data
Lake



Data
Factory



Data
Science



Data
Warehouse



Lakehouse



Microsoft
Purview



Real-Time
Intelligence

Project Management & Accounting



Engineer to Order (ETO) & Industrial Equipment Manufacturing

- › Enable custom quoting, end-to-end project planning, and asset tracking for built-to-order equipment with full lifecycle visibility.
- › Examples: Industrial machinery, HVAC, transformers, generators, packaging equipment

Construction & Engineering

- › Manage BOQ-based project budgeting, variation orders, subcontractors, and milestone-based billing from a unified platform.
- › Examples: Infrastructure firms, EPC companies, civil engineering, real estate developers

Professional Services / Consulting

- › Streamline resource planning, project accounting, and intercompany billing to optimize profitability across service engagements.
- › Examples: IT consulting, legal firms, audit firms, architecture and design agencies

Oil & Gas / Energy & Utilities

- › Deliver complex project tracking, compliance, mobile service execution, and asset lifecycle management in field-intensive environments.
- › Examples: Oilfield services, pipeline infrastructure, energy distribution, water utilities

Aerospace & Defense

- › Support high-complexity, regulated project execution with integrated change control, costing, and multi-level approvals.
- › Examples: Defense contractors, aircraft manufacturers, MRO providers

Capital Equipment / OEMs

- › Handle configure-to-order workflows, installation, and aftermarket service with seamless data flow from sales to field support.
- › Examples: Printing presses, medical equipment, CNC machines, industrial robotics

Facilities Management / Maintenance Providers

- › Automate preventive maintenance, manage technician scheduling, and track service-linked project costs and warranties.
- › Examples: HVAC services, property maintenance firms, building automation, utilities

Chemical or Process Manufacturing (Project-Based)

- › Support plant setup, expansion projects, and custom production with integrated project accounting and vendor collaboration.
- › Examples: Specialty chemicals, fertilizers, paints and coatings, batch manufacturers



Fixed Price Project

A Fixed-price project is used when a customer agrees to pay a set amount for the entire project, regardless of the actual costs. Revenue is recognized based on estimates using methods like the percentage of completion or completed contract. Billing is usually done through predefined milestones or periodic instalments. This type is ideal for long-term projects with clearly defined deliverables.



Investment Project

An Investment project is an internal project type used to track and capitalize costs that will result in the acquisition or creation of a fixed asset. These projects do not generate revenue or involve customers but are crucial for capitalizing costs.



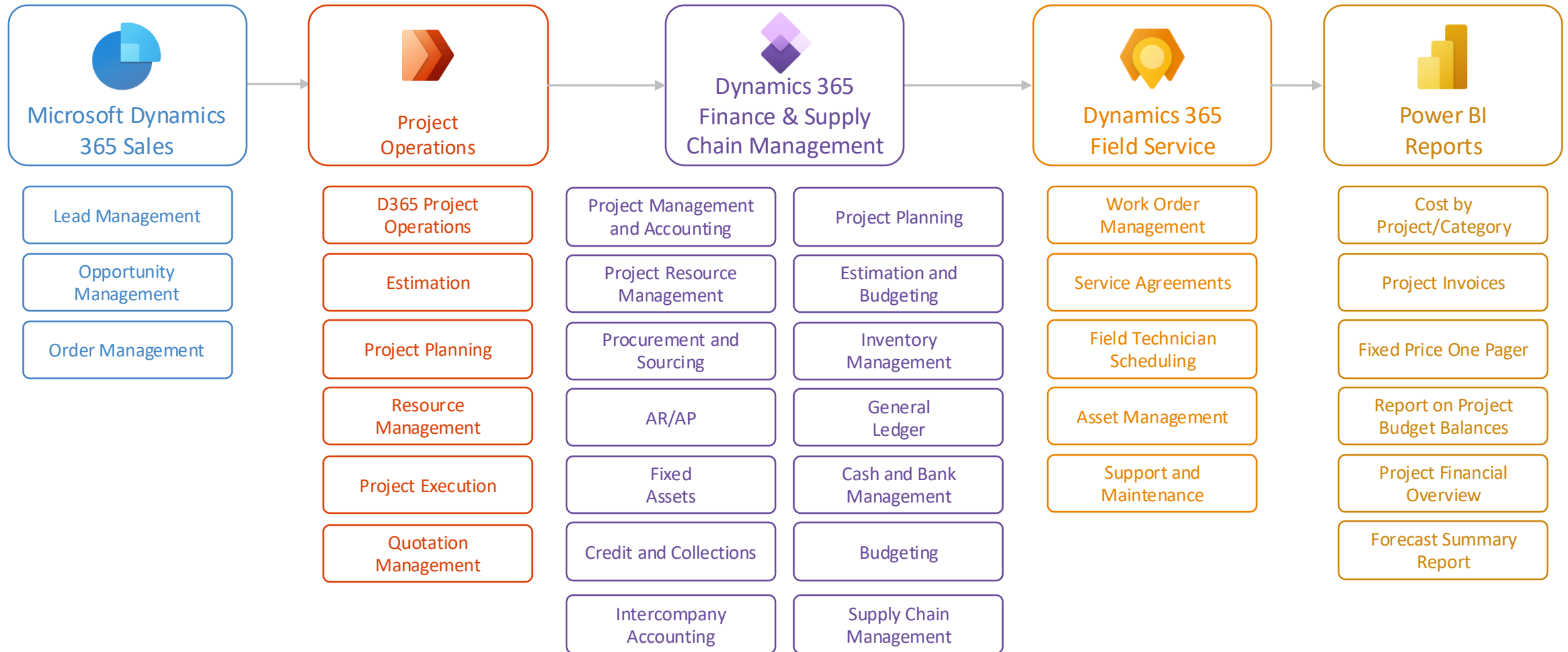
Time and Material Project

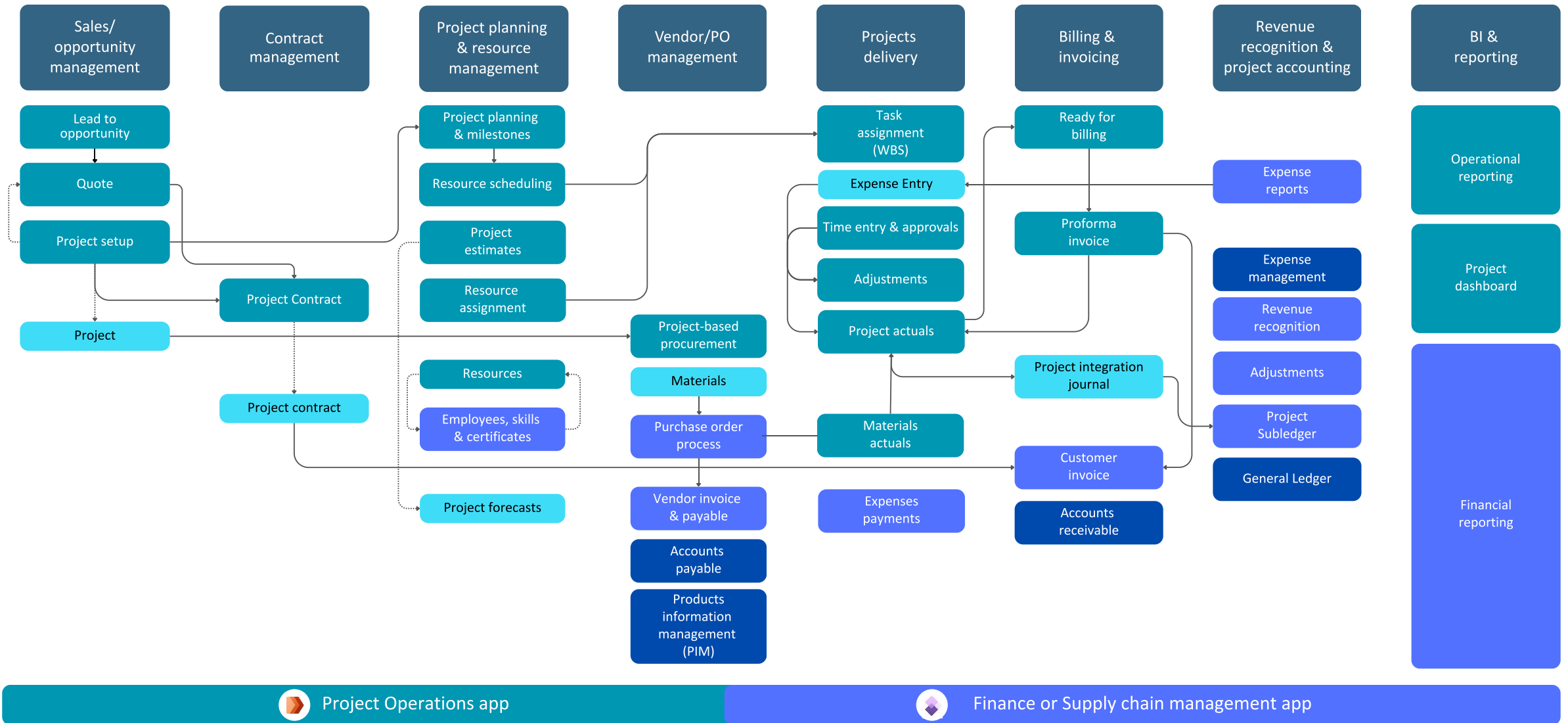
In Time and material projects, the customer is billed for all costs that are incurred on a project. These costs include costs for hours, expenses, items, and fees.



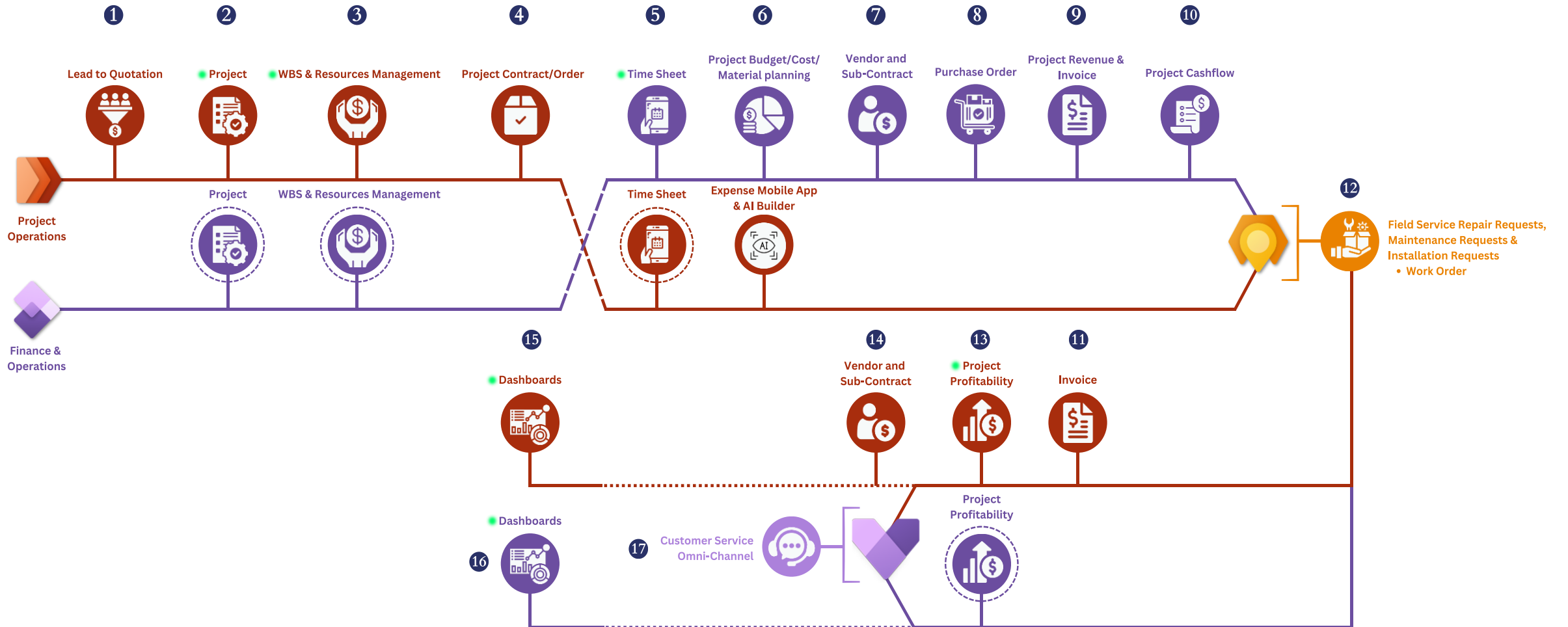
Internal Project

An Internal Project is used for internal tracking of operational expenses. It does not generate revenue or involve customer billing. Organizations use cost projects to monitor expenses related to internal initiatives such as training programs or process improvement projects.





Master data: Customers, Sales Prices, Cost Prices Products, Employees Vendors Subcontractors



- › Lead from multiple sources
- › Customer 360 visibility for open pipeline, credit health, and transactions
- › **Auto Task Assignment:** Based on opportunity revenue potential
- › Advance Payment Handling
- › Process Checklists via Business Process Flow
- › Variation Order Handling at the lead/opportunity stage
- › **Subcontractor Management:** Tender process and third-party system integration, ensuring collaboration, contract visibility, and timely delivery.

The screenshot shows a lead record for Sarah Thompson. The lead is in the 'Develop' stage (28 D) and is owned by Demo User. The lead source is 'External Referral'. The lead is active for 30 days. The record includes a summary tab, contact information (Topic: Installation of Application Service, Type: Item based, First Name: Sarah, Last Name: Thompson, Job Title: General Manager, Business Phone: 78786), a timeline with a recent email from Demo User, and a list of stakeholders including Abby Roy and Sarah Thompson. The record also shows competitors like L&T Pvt. Lt.

The screenshot shows an opportunity record for 'Installation of digital service'. The opportunity is in the 'Quote Customer Approval' stage (7 Mo) and is owned by Demo User. The opportunity is active for 7 months. The record includes a summary tab, information (Topic: Installation of dig..., Opportunity Id: HRB-1224, Potential Customer: Kansoft Solutions, Type: System, Account Manager: Demo User (Off), Est. Close Date: 10/31/2024, Description:), a timeline, and a list of entitlements. The record also shows the status 'Won' and the date '10/15/2024 9:19 AM'.

- › Order Segregation and Validation: Unified screens for Retail, Sample, and Project orders
- › System-driven task allocation and business rules
- › Auto-invoice generation for sample orders
- › Language Translation for Orders
- › Customer Finance Checks: Validate customer credit and registration systematically

Test Subodh 12 May 2025 5 Project - Unsaved

Order · Order ▾

KWD248,353.222 Total Amount KWD0.000 Payment Received AE MSD ADMIN Owner Active Status ▾

Summary Approval Field Service Related ▾

Ship To Country * Kuwait ×

Ship To Country Code KWT

Ship to Street1 in Arabic ---

Ship to City in Arabic ---

Ship To State/Province in Arabic ---

Ship To ZIP/Postal Code in Arabic ---

Ship To Country in Arabic ---

Rows: 1

Total Cost After Warranty & Installation	KWD198,965.158
Profit Margin %	19.89
Profit Value	KWD49,388.078
Detail Amount Before Discount	KWD248,706.440
Detail Amount	KWD248,353.222
Header Discount	KWD353.222
Total of Line and Header Discount	KWD353.222
Pre-Freight Amount	KWD248,353.222
(+) Freight Amount	KWD0.000
Net Amount	KWD248,353.220
(+) Total Tax	KWD0.000
Total Amount	KWD248,353.222
Form Save	No ▾
Flow Update	No ▾

Project Status

Initial Profit Value KWD49,388.078

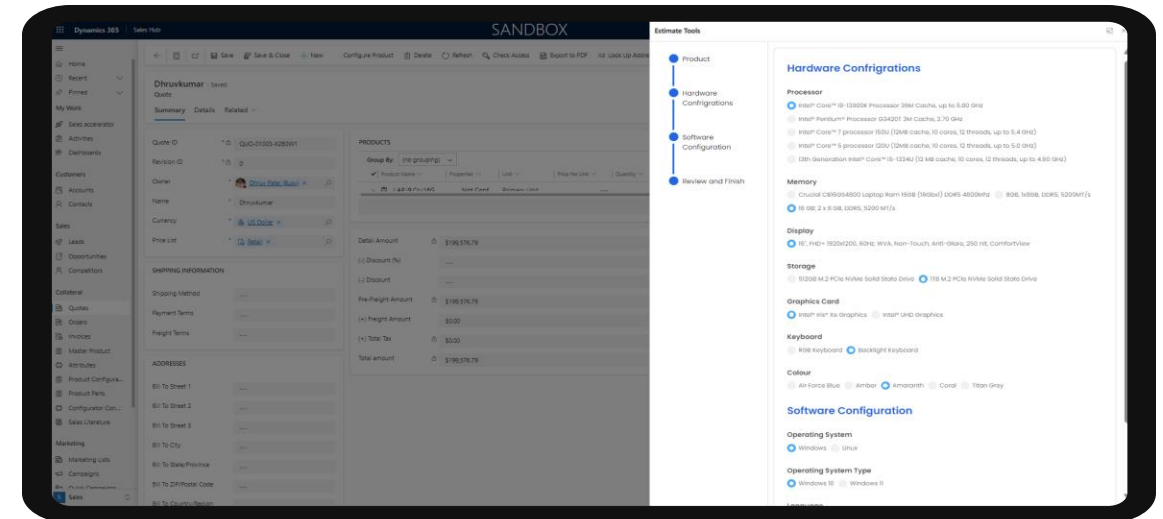
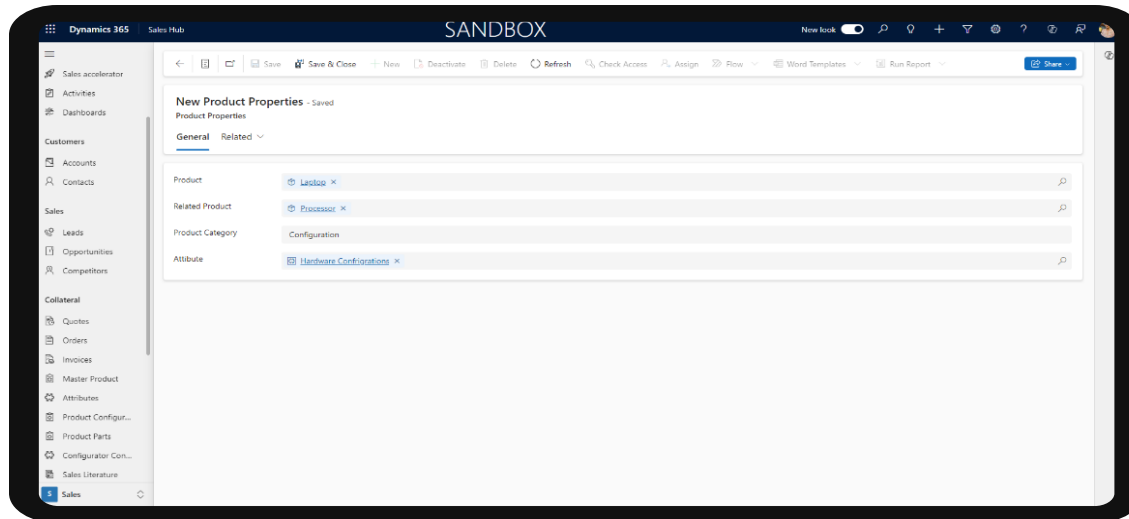
Initial Profit Value (Base) KWD49,388.078

Product Configuration

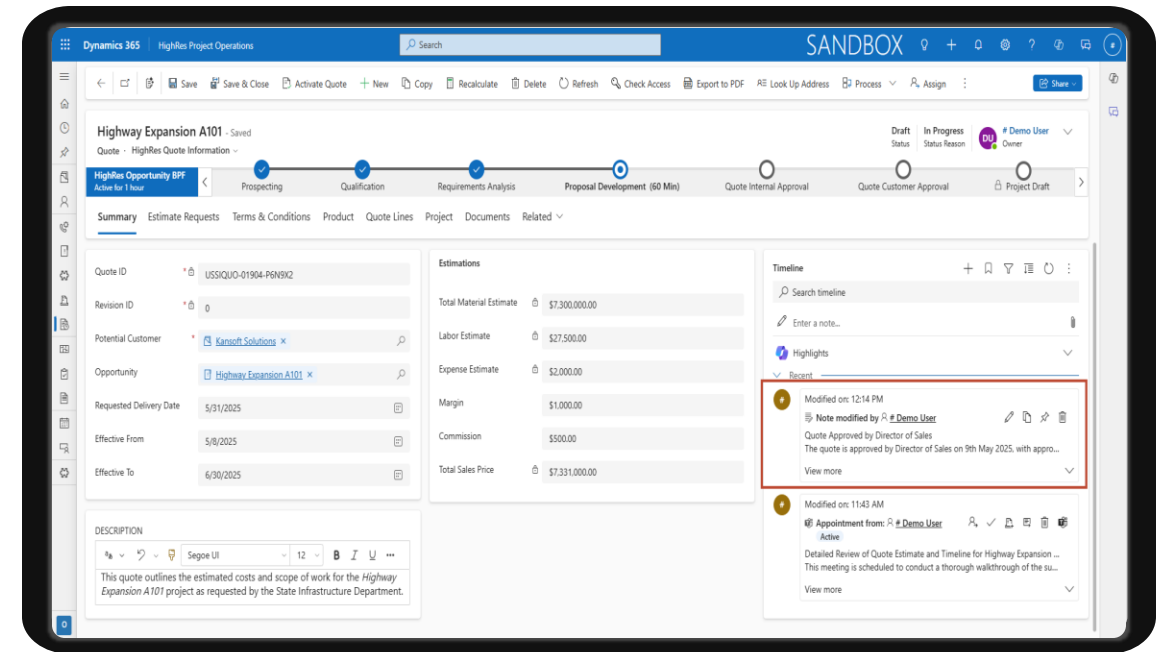
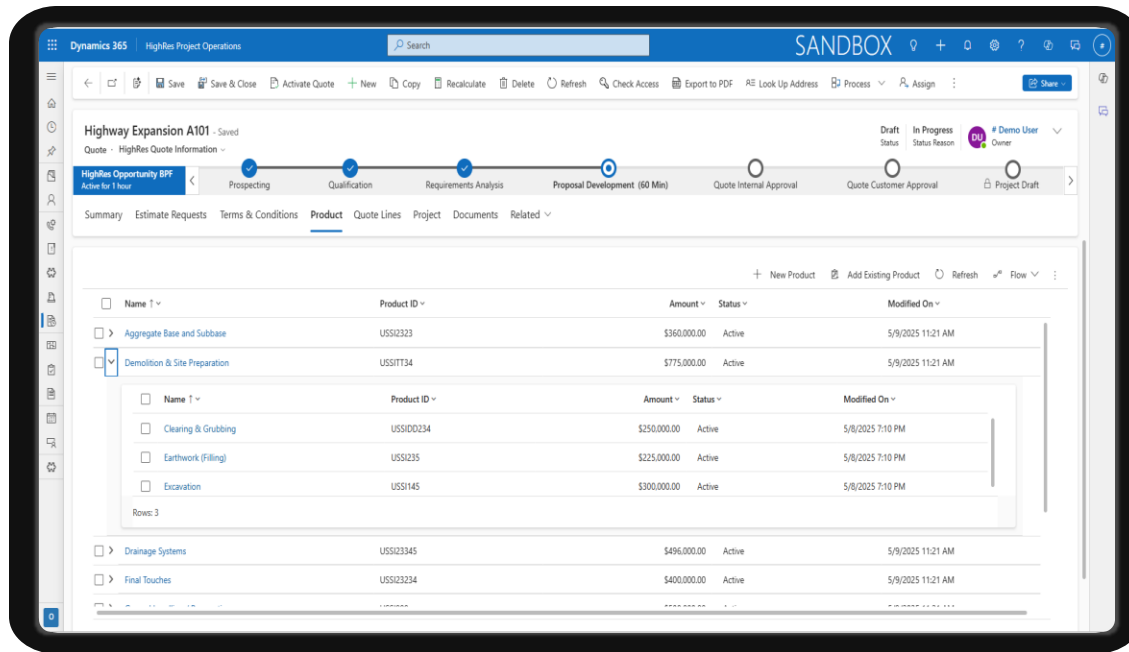
- › Easily create products by adding key details under Master Products.
- › Define attributes, parts, and related services to build tailored offerings.
- › Configure pricing directly or set dynamic pricing based on product variants.

Quote Generation

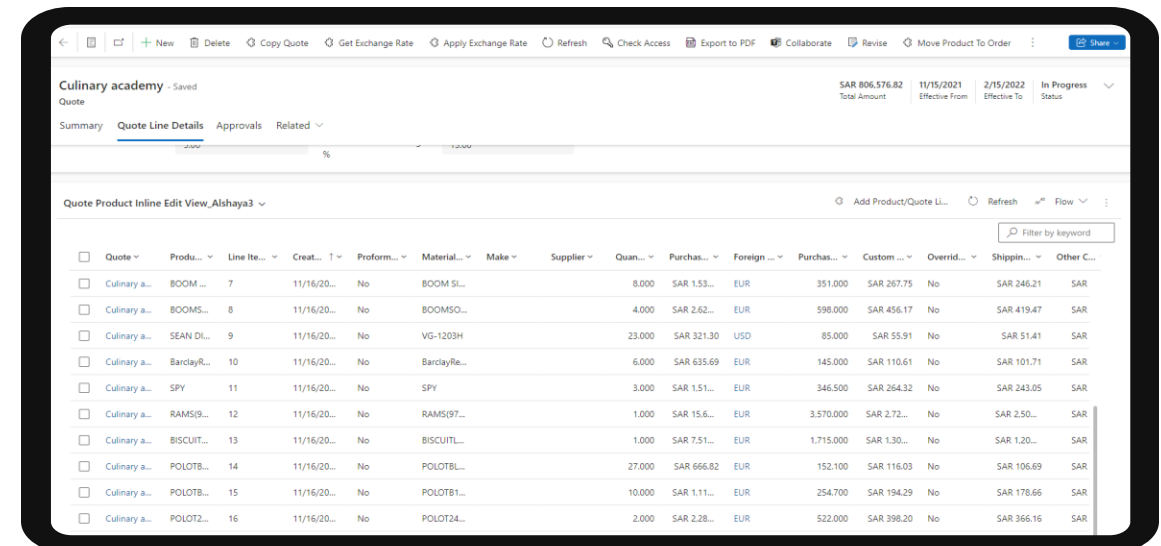
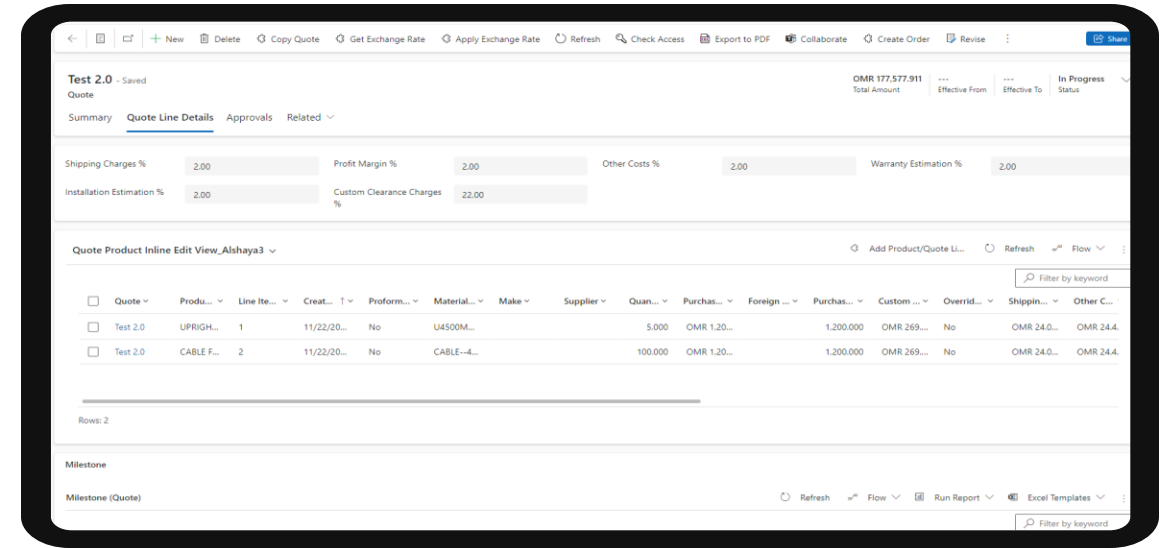
- › Initiate a new quote, select products, and configure them using category-specific options.
- › Customize hardware, software, and service components to match customer needs.
- › Review selections before submission and auto-generate a sales order line with full configuration details.



- › Sales reps can review quote summaries and approved estimation requests.
- › CPQ selections auto-add parent and child products to the quote.
- › Default terms auto-populate; additional terms can be added as needed.
- › Quotes are routed to management via CE for approval with record links.
- › Approvals/rejections include comments visible in the CE timeline.
- › End-to-end business process flow ensures standardization and traceability.



- › **Centralized Quote Process:** On-the-fly quote creation with embedded cost/margin logic
- › **Dynamic Project Quote Calculation:** Real-time quote generation with multi-currency vendor pricing
- › **Quote Import Templates:** Excel-based, business unit-specific templates with FX support
- › **Terms & Conditions Auto Assignment:** Based on quote type
- › **Quote Financial Summary Snapshot:** View margins, pricing, exchange rates in one place
- › **Quote Margin Distribution:** Assign cost components like shipping/installation
- › **Finance Due Diligence Logic:** Ensures systematic validations
- › Invoice Generation
- › Exchange Rate Integration & History



- › BOQ-driven Automated WBS and Budget Creation
- › BOQ-Based Budgeting from pre-defined templates
- › **Product Master Sync:** Create products on-the-fly from CE
- › **Exchange Rate Master:** Historical FX tracking for accurate budgeting
- › Automated Milestone Creation using custom split templates (e.g., 50/50)
- › Project Number Sequences by project type
- › **Resource Management:** Monitor skills, availability, and workload for optimal task assignment and productivity.

Final Project -Automated Liquid Handling - Saved

Project · Project ▾

Summary Tasks Team Resource Assignments Resource Reconciliation Sales Task Billing Setup Tracking Time phased estimates Risks ▾

General

Project ID * P-003221-B

Name * Final Project -Automated...

Customer

Quote Automated Liq... x

Schedule Mode * Fixed duration

Project Type

Project Group

Project manager * Demo User (QI x

Estimates

Estimated Start Date 4/30/2024

Finish Date

Effort (Hours) 0.00

Estimated Labor Cost \$0.00

Estimated Expense Cost \$12.00

Estimated Material Cost \$0.00

Estimated Total Cost \$12.00

Actuals

Actual Start

Actual Finish

Effort Completed (Hours) 0.00

Actual Labor Cost \$0.00

Actual Expense Cost \$0.00

Actual Material Cost \$0.00

Actual Total Cost \$0.00

Finance and Operations

Search for a page

ORD-020312: HCW-CP0-ME-0037-HILTON CAUSEWAY@DAM | My view ▾

BOQ Import

Project ID	Project c...	Item number	Product type	Item model group	Item VAT Group	Site	Warehouse	Quantity	Unit	Unit cost p...	Unit sales ...
ORD-020312	ProjItem	GIR-H56032-IC-E	Item	FIFO	STD-15%	AE-KSA	HOS-WH-BDR	1.00	EA	0.000	47,743.170
ORD-020312	ProjItem	CUS-600-4419	Item	FIFO	STD-15%	AE-KSA	HOS-WH-BDR	1.00	EA	0.000	3,710.700
ORD-020312	ProjItem	WPL-ADV758E	Item	FIFO	STD-15%	AE-KSA	HOS-WH-BDR	1.00	EA	0.000	15,280.190
ORD-020312	ProjItem	WPL-ADV50E	Item	FIFO	STD-15%	AE-KSA	HOS-WH-BDR	1.00	EA	0.000	12,148.190
ORD-020312	ProjItem	FIR-EG-120-EVO	Item	FIFO	STD-15%	AE-KSA	HOS-WH-BDR	1.00	EA	0.000	90,094.440
ORD-020312	ProjItem	GDN-GB-S-88-F	Item	FIFO	STD-15%	AE-KSA	HOS-WH-BDR	1.00	EA	0.000	5,787.900
ORD-020312	ProjItem	GDN-P-88-CP-AB	Item	FIFO	STD-15%	AE-KSA	HOS-WH-BDR	1.00	EA	0.000	31,703.380
ORD-020312	ProjItem	GDN-PM-98-U3	Item	FIFO	STD-15%	AE-KSA	HOS-WH-BDR	1.00	EA	0.000	23,780.690
ORD-020312	ProjItem	GDN-P-88-U3-AB	Item	FIFO	STD-15%	AE-KSA	HOS-WH-BDR	1.00	EA	0.000	28,963.780
ORD-020312	ProjItem	GDN-MAJESTIC/A	Item	FIFO	STD-15%	AE-KSA	HOS-WH-BDR	1.00	EA	0.000	14,632.190
ORD-020312	ProjItem	GDN-AMBRIA	Item	FIFO	STD-15%	AE-KSA	HOS-WH-BDR	1.00	EA	0.000	5,283.900
ORD-020312	ProjItem	TMP-Y-151	Item	FIFO	STD-15%	AE-KSA	HOS-WH-BDR	1.00	EA	0.000	27,530.980
ORD-020312	ProjItem	ORA-H-603-M	Item	FIFO	STD-15%	AE-KSA	HOS-WH-BDR	1.00	EA	0.000	5,731.200
ORD-020312	ProjItem	CNT-CONTROLV2	Item	FIFO	STD-15%	AE-KSA	HOS-WH-BDR	4.00	EA	0.000	1,381.500
ORD-020312	ProjItem	NMT-ALUMTROLLEY/M	Item	FIFO	STD-15%	AE-KSA	HOS-WH-BDR	43.00	EA	0.000	1,295.100
ORD-020312	ProjItem	NMT-ALUMTROLLEY/M	Item	FIFO	STD-15%	AE-KSA	HOS-WH-BDR	19.00	EA	0.000	1,295.100

- › **Inventory Cost Posting:** Consumption auto-updated in project ledger
- › **Milestone Invoicing Automation:** Triggered via WBS activity completion
- › Project Invoicing & Revenue Recognition
- › Budget vs Actual Reporting by budget line
- › **Costing Reports:** Monthly material/routing cost by production hierarchy
- › Project Cash Flow Forecasting and Reporting
- › Variation Orders and Design-to-Installation Workflow
- › Advance Payment Setup and Tax Integration
- › Auto Installation Work Order Creation

Options | Standard view

Billing rules

Project contract ID: PJ00001185 | Billing rule: BR0000376 | Line type: Milestone | Description: [M] PO Received | Project ID: CPJ0000311 | **Activity number: 100-008512**

Billing rule line details

Contract value: 78,833.00 | Change order number:

Milestone

Project date	Description	Type	Code	Project ID	Sales cur...	Sales price	Activity	Invoice status
9/24/2024	Material - Systems & Dev...	Sales Category	Material - Systems & Dev...	CPJ0000311	USD	78,408.00	[M] PO Received	Fully invoiced
9/24/2024	Services - Misc	Sales Category	Services - Misc	CPJ0000311	USD	425.00	[M] PO Received	Fully invoiced

Work breakdown structure | CPJ0000311 | MC02465 Pfizer - Groton CoLAB Flex

Standard view

CPJ0000311: MC02465 Pfizer - Groton CoLAB Flex

Currently published

+ New | Delete | Outlines | Indent | Move up | Move down | Expand to | Details | Import | Export | Attachments | Auto scheduling | Resource | Product dimension

View: Scheduling | Auto scheduling | Show schedule errors

WBS ID	Activity number	Activity status	S...	N...	Task name	Predecessors	Category	Effort in hours	Task start date	Task end date	Duration	Number of resou...
1	100-008505	Not started			CPJ0000311			24.00	9/24/2024	9/26/2024	3.00	
1.1	100-008507	Not started			Project Management			0.00	9/24/2024	9/24/2024	1.00	
1.1.1	100-008543	Not started			Labor - Project Management		Labor - Project Manage...	0.00	9/24/2024	9/24/2024	1.00	1.0
2	100-008508	Not started			Travel			0.00	9/24/2024	9/24/2024	1.00	
2.1	100-008544	Not started			Labor - Travel		Labor - Travel	0.00	9/24/2024	9/24/2024	1.00	1.0
2.2	100-008545	Not started			Expense - Travel		Labor - General	0.00	9/24/2024	9/24/2024	1.00	1.0
3	100-008509	Not started			Training			0.00	9/24/2024	9/24/2024	1.00	
3.1	100-008546	Not started			Labor - Training		Labor - Training	0.00	9/24/2024	9/24/2024	1.00	1.0
3.2	100-008547	Not started			Expense - Training		Labor - General	0.00	9/24/2024	9/24/2024	1.00	1.0
4	100-008511	Not started			FDS Sign Off		Labor - General	0.00	9/24/2024	9/24/2024	1.00	1.0
5	100-008512	Completed			[M] PO Received		Labor - Milestone	0.00	9/24/2024	9/24/2024	1.00	1.0
6	100-008510	Not started			Design			0.00	9/24/2024	9/24/2024	1.00	
6.1	100-008548	Not started			Labor - Design		Labor - Design	0.00	9/24/2024	9/24/2024	1.00	1.0
7	100-008513	Not started			[M] Hardware Received		Labor - Milestone	0.00	9/24/2024	9/24/2024	1.00	1.0
8	100-008514	Not started			Build			0.00	9/24/2024	9/24/2024	1.00	
8.1	100-008549	Not started			Labor - Build		Labor - Build	0.00	9/24/2024	9/24/2024	1.00	1.0

WIP & Committed Cost Forecasting

- › **WIP Tracking:** Enabled visibility of unbilled progress across EPC and manufacturing projects.
- › **Committed Costs:** Tracked open POs and resource allocations for accurate budget control.
- › **Forecasting:** Integrated with dashboards for proactive financial decisions.

Finance and Operations

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Item task

Options

Committed costs

00000057 : 1/4/2015

Standard view * v

Filter

Open

Overview

General

Financial dimensions

Open	Committed date	Project ID	Category	Item	Resource	Role ID	Quantity	Cost price	Cost amount	Transaction origin	
✓	1/1/2016	00000009	ProjItem	S0017			1.00	6,459.00	6,459.00	Vendor invoice	
✓	2/1/2016	00000010	ProjItem	S0011			1.00	3,314.00	3,314.00	Purchase order	
✓	2/1/2016	00000010	ProjItem	S0014			1.00	5,269.00	5,269.00	Purchase order	
✓	11/26/2016	00000012	ProjItem	S0014			1.00	5,269.00	5,269.00	Vendor invoice	
✓	11/26/2016	00000012	ProjItem	S0013			1.00	6,969.00	6,969.00	Vendor invoice	
✓	11/26/2016	00000012	ProjItem	S0011			2.00	3,314.00	6,628.00	Vendor invoice	
✓	11/26/2016	00000012	ProjItem	S0017			1.00	6,459.00	6,459.00	Vendor invoice	
✓	11/5/2016	00000096	QA		000366	Karen Berg	Project manager	3.00	175.00	525.00	Timesheets
✓	11/6/2016	00000096	QA		000366	Karen Berg	Project manager	3.00	175.00	525.00	Timesheets
✓	11/9/2016	00000096	QA		000366	Karen Berg	Project manager	3.00	175.00	525.00	Timesheets
✓	11/10/2016	00000096	QA		000366	Karen Berg	Project manager	3.00	175.00	525.00	Timesheets
✓	11/11/2016	00000096	QA		000366	Karen Berg	Project manager	3.00	175.00	525.00	Timesheets
✓	11/16/2016	00000096	QA		000366	Karen Berg	Project manager	4.00	175.00	700.00	Timesheets
✓	11/17/2016	00000096	QA		000366	Karen Berg	Project manager	3.00	175.00	525.00	Timesheets

Revenue Recognition

- › **Flexible Models:** Supported milestone, % completion, and T&M recognition.
- › **WBS-Linked Automation:** Revenue posted based on activity progress.
- › **Financial Accuracy:** Real-time sync with billing ensures audit-ready books.

Revenue recognition | 00000101 : Global Sporting Goods

Standard view v

Filter Include reversed EstMonth Estimate

Overview General Profit and loss WIP Consumption Hour rate Totals

Revenue recognition ...	Revenue status	Percentage co...	Re...	Revenue project	Description	Contract value	Invoiced reven...	Accrued revenue	Total cost	Gross margin
11/30/2016	Posted	50.00	✓	00000101	Global Sporting Goods	764,908.90	764,908.90	382,454.45	82,594.93	78.40
12/31/2016	Posted	100.00	✓	00000101	Global Sporting Goods	764,908.90	0.00	382,454.45	414,792.53	-8.46

- › Purchase Order and Vendor Invoice Processing
- › **Inventory Posting:** Material usage updates cost/stock in real time
- › Auto Material Posting to Projects
- › Advanced Warehouse Management & Inventory Recalculation

ProjectID
All

Company ID
All

Business Unit
All

Purchase Order Number	Project ID	BusinessUnit	Project Name	Delivery Name	Name	Purchase Order Status	Vendor Name	Purchase C
103165	Y5770	BSH	TIMET, PO# 4501106307			Cancelled	RECCO	
103179	Y5771	BSH	TIMET, PO# 4501110594			Invoiced	BUSCH MARTEC, L.L.C.	
103322	Y5771	BSH	TIMET, PO# 4501110594			Invoiced	NEW YORK BLOWER	
103510	Y5786	BSH	Redwood Materials, PO# 563			Invoiced	HEE-DUALL - A CECO ENVIRONMENT	
103588	Y5782	BSH	Arconic, PO# 140675684			Open Order	RECCO	
103590	Y5783	BSH	Arconic, PO# 140675682			Invoiced	RECCO	
103590	Y5783	BSH	Arconic, PO# 140675682			Open Order	RECCO	
103651	F04899	FKI	XQ 120-38 QUAD CYCLONE			Open Order	DAVID P. WILSON COMPANY	
103668	Y5782	BSH	Arconic, PO# 140675684			Invoiced	NEW YORK BLOWER	
103674	Y5782	BSH	Arconic, PO# 140675684			Invoiced	BUSCH MARTEC, L.L.C.	
103689	Y5783	BSH	Arconic, PO# 140675682			Invoiced	FLEX-KLEEN CORP.	
103689	Y5783	BSH	Arconic, PO# 140675682			Open Order	FLEX-KLEEN CORP.	
103692	Y5783	BSH	Arconic, PO# 140675682			Invoiced	AMERICAN PULVERIZER COMPANY	
103704	Y5783	BSH	Arconic, PO# 140675682			Open Order	WM W. MEYER & SONS	
103826	Y5783	BSH	Arconic, PO# 140675682			Invoiced	NEW YORK BLOWER	
104081	Y5782	BSH	Arconic, PO# 140675684			Invoiced	R & T MECHANICAL INC.	
104081	Y5782	BSH	Arconic, PO# 140675684			Open Order	R & T MECHANICAL INC.	
104107	F04904	FKI	XQ 120-27M--4 QUAD			Cancelled	FLUID ENGINEERING	
104123	F04899	FKI	XQ 120-38 QUAD CYCLONE			Invoiced	KIRK & BLUM	
104123	F04899	FKI	XQ 120-38 QUAD CYCLONE			Open Order	KIRK & BLUM	
104135	T3023	KB	WOOD PELLET DRYER SYSTEM			Open Order	KIRK & BLUM	
104154	W010330	ADW	RETOX DUAL CHAMTER RTO SYSTEM			Invoiced	HAYES AUTOMATION, INC	
Total								66,447,



Intercompany Timesheet

- › Employees log time on projects across legal entities.
- › Ensures accurate project costing and cross-entity collaboration.
- › Eliminates manual effort in intercompany project tracking.



Intercompany Expense Report

- › Submit expenses in one entity for projects in another.
- › Aligns costs with the correct legal entity for transparency.
- › Enhances compliance in multi-entity expense management.



Intercompany Pending Vendor Invoice

- › Allocate vendor invoice costs to the benefiting legal entity.
- › Maintains project and financial accuracy across entities.
- › Prevents misstatements with proper cost assignment.



Intercompany AR & AP Invoice Automation

- › Transfers costs via automated intercompany customer and AP invoices.
- › Uses mirrored invoice numbers for alignment and traceability.
- › Strengthens audit readiness and financial compliance.

Legal entity	Customer	Customer name	Project ID	Project name	Activity number	Activity	Category	Deferred	Sun 04/20	Mon 04/21	Tue 04/22	Wed 04/23	Thu 04/24	Fri 04/25	Sat 04/26
1430	1430	The University of Texas Health Science Ca...	16065.01	16065 - Adhoc Consulting and ...	A151849	2.01 - Project Star...	Int'l		2.00	3.00	4.00	5.00	6.00		
Total									20.00						

1

Streamlined F&O via Business Process Flow

- › Standardizes key processes like invoice validation, customer onboarding, and sales order approvals.
- › Automates validations and enforces business rules to minimize manual intervention and errors.
- › Ensures consistent execution across entities with system-guided steps.

4

Credit and Collections

- › Enforces credit limits based on customer profiles and payment history.
- › Automates dunning letters, reminders, and collection escalations.
- › Integrates with sales and finance data for proactive credit risk control.

7

System-Driven Sales Order Compliance

- › Validates orders against pricing, terms, tax rules, and master data.
- › Prevents submission of incomplete or non-compliant orders.
- › Supports exception handling and alerts to enforce sales governance.

2

AR/AP Management

- › Manages customer and vendor invoices end-to-end—creation, approvals, posting, and payments.
- › Supports automated matching for vendor invoices and intercompany AR/AP processing.
- › Handles credit memos, multi-currency transactions, and consolidation across legal entities.

5

Compliance

- › Supports local tax regulations, audit readiness, and statutory reporting.
- › Ensures traceability across workflows, approvals, and financial records.
- › Enforces internal controls and reduces compliance risk in financial operations.

8

Role-Based Security

- › Restricts access to finance functions based on roles, units, or hierarchy.
- › Enforces segregation of duties across users (e.g., entry vs. approval rights).
- › Protects sensitive financial data and ensures audit-readiness.

3

Cash and Bank Transactions

- › Enables real-time visibility of cash flow across multiple legal entities and accounts.
- › Automates reconciliations, deposits, check issuance, and bank transfers.
- › Tracks all cash movements to support liquidity planning and treasury operations.

6

Invoice Proposal Logic

- › Automates invoice generation from timesheets, milestones, or order delivery.
- › Applies customer-specific billing rules and margin validation before submission.
- › Reduces manual effort and billing errors with predefined invoice logic.

9

Payment Terms Sync with D365 CE

- › Automatically syncs payment terms between CE and F&O using Dual Write.
- › Aligns commercial terms across quoting, invoicing, and collections.
- › Reduces disputes and improves consistency between departments.

Execution & Operations

- › Work Orders auto-linked to D365 Project Contracts and Tasks
- › Time & Expense Capture from technicians, feeds directly into project costs
- › Inventory Usage auto-posted to project costs and inventory records
- › Resource Calendar: Technician scheduling
- › Mobile Technician App for on-the-go service updates
- › Service Agreements for Reactive and Preventive Maintenance
- › Auto Case Creation from support tickets
- › Variation Order Handling

Financial Integration & Billing

- › Role-Based Access Control to Field Operations
- › Project-aligned Work Order Costing

Workflows & Automation

- › Business Process Flows configured for over 200 Business Units
- › Digital Approval Workflow: Auto-triggered based on criteria
- › Outlook App Integration for task alerts
- › Quote Import Templates by BU with currency conversion
- › Finance Due Diligence Automation
- › Auto Milestone and Invoice Proposal generation

Data Integration & Governance

- › Seamless Integration of 35+ data entities
- › Dual Write to eliminate redundancy between CE and FO
- › CDS Integration for recurring sync
- › Customer and Product Master Sync across systems
- › Role-Based, Hierarchical Security Framework

› BI for Project Analysis:

Costing, Financials, Budget Control

› OPS Benchmark Reports:

Cost by Project/Line, Customer and Vendor Invoices

› OPS Forecast Model:

POC (Percentage of Completion), Cost Commitment PO

Includes trendline projections for % completion & margin alerts

› FIN Invoice Reports:

Open and All Project Invoices, Statement of Accounts

› Project Dashboards:

Unified, real-time performance visibility

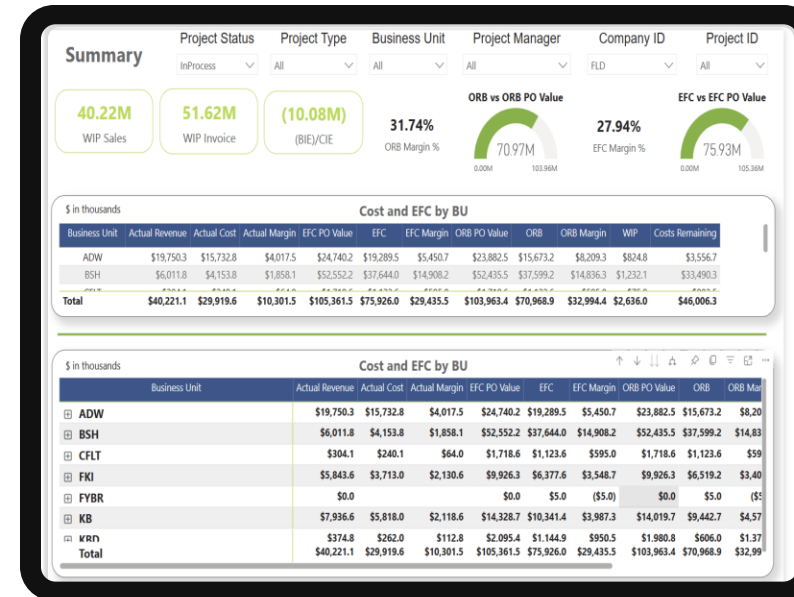
› Configured per role – project managers, controllers, CFOs

› Project Item Forecast Reports:

Forecast vs Actuals by division/region/type

› Audit Reports:

Intercompany traceability and margin analysis



Project ID	Forecast Type	Item Number	Vendor	PO	PO Amt	Item Amt	Forecast Cost	Act Cost	PI	Jan	Feb	Mar	Apr	May
DP001045-02	Non-Fabricator	Expenses			0	0	3,562	3,748	-186					
DP001045-02	Non-Fabricator	Material			0	0	0	0	-28,611					
DP001045-02	Non-Fabricator	Material	1817-V-S00850	BOI	PO002157	595	0	0	595	0				
DP001045-02	Non-Fabricator	Material	18RG	CATHEY COMPANY	PO002156	4,773	0	0	4,773	0				
DP001045-02	Non-Fabricator	Material	18ENTAL	MATHESON TR-GAS	PO002173	60	0	0	60	0				
DP001045-02	Non-Fabricator	Material	1SERVICE			0	0	50,000	0	50,000				
DP001045-02	Non-Fabricator	Material	1TESTING	ST CROIX SENSORY INC	PO002290	23,183	0	0	23,183	0				
DP001045-02	Non-Fabricator	Material	EFC INCREASE			0	0	6,121	0	6,121				
DP001045-02	Non-Fabricator	Material	EFC INCREASE			0	0	4,855	0	4,855				
DP001045-02	Non-Fabricator	Material	Engineering Labor			0	0	2,637	2,637	0				
DP001045-02	Non-Fabricator	Material	Engineering Labor			0	0	65,942	65,942	0				
DP001045-02	Non-Fabricator	Material	Expenses			0	0	1,083	1,083,776	-1,304,683				
DP001045-02	Non-Fabricator	Material	EFC INCREASE			0	0	0	0	-4,925				
DP001045-02	Non-Fabricator	Material	TEST	INTEGRITY AIR MONITORING	PO000942	9,600	9,600	0	325					
DP001045-02	Non-Fabricator	Material	350B			0	0	387,252	0	387,252				
DP001045-02	Non-Fabricator	Material	60Y5			0	0	1,601,836	0	1,601,836				
DP001045-02	Non-Fabricator	Material	EFC INCREASE			0	0	623	0	623				
DP001045-02	Non-Fabricator	Material	Engineering Labor			0	0	2,716	2,716	0				
DP001045-02	Non-Fabricator	Material	Expenses			0	0	5,048	51,111	-46,063				
DP001045-02	Non-Fabricator	Material	18AGRES35352	GLOBAL-PNK	PO001719	5,825	0	0	3,894	0				
DP001045-02	Non-Fabricator	Material	18SASTING75-S156	EXOTIC AUTOMATION & SUPPLY	PO002317	477	0	0	0	0				
DP001045-02	Non-Fabricator	Material	18USHING	BOI	PO002214	448	0	0	448	0				
Total						49,622,732	10,219,487	151,243,756	73,461,925	31,468,195	7,919,464	262,884	1,481,506	912,878

Company	Business Unit	Customer Account	Invoice Number	Invoice Date
All	All	000005101 000005202 000005709 000006202	EP00000316 EP00000317 EP00000318 EP00000319	1/6/2023 7/3/2023

Project ID	AccountNum	Name	InvoiceID	InvoiceDate	Terms	TotalInvoice	AmountPaid	AmountOpen	DueDate	Overdue	InvoiceAge	Last
PJ00000471	CO000700	WMA Corp	PJ00000599	01/06/2023	N030	\$1,109.00	\$0.00	\$1,109.00	02/06/2023	179		
PJ00000501	CO000326	ADRISSON INC	PJ00000591	01/10/2023	N030	\$27,427.20	\$0.00	\$27,427.20	02/06/2023	175		
PJ00000113	CR00002	CROWN CORK & SEAL USA, INC	EP00000319	01/13/2023	N030	\$1,129.00	\$0.00	\$1,129.00	02/12/2023	172		
PJ00000123	CO000020	GEORGE KOCH SONS EUROPE LTD	EP00000316	01/13/2023	N030	\$94,536.00	\$0.00	\$94,536.00	02/12/2023	172		
PJ00000123	CO000020	GEORGE KOCH SONS EUROPE LTD	EP00000317	01/13/2023	N030	\$78,780.00	\$0.00	\$78,780.00	02/12/2023	172		
PJ00000129	FOR0001	FORMICA LTD	EP00000316	01/13/2023	N030	\$50,480.00	\$0.00	\$50,480.00	02/12/2023	172		
PJ00000444	CR00002	CROWN PACKAGING UK PLC	EP00000323	01/16/2023	N030	\$11,743.20	\$0.00	\$11,743.20	02/18/2023	166		
PJ00000444	CR00002	CROWN PACKAGING UK PLC	EP00000324	01/16/2023	N030	\$3,914.40	\$0.00	\$3,914.40	02/18/2023	166		
PJ00000128	TUL001	PILGRIMS PRIDE LTD	EP00000325	01/16/2023	N030	\$774.00	\$0.00	\$774.00	02/18/2023	166		
PJ00000821	CO000818	HARPER INTERNATIONAL CORP	PJ00000597	01/16/2023	N030	\$6,496.50	\$0.00	\$6,496.50	02/18/2023	166		
PJ00000135	ST0001	STOLLER EUROPE LIMITED	EP00000326	01/20/2023	N030	\$60,238.00	\$0.00	\$60,238.00	02/18/2023	165		
FLD-000171	7442	ARCONEG RIGID PACKAGING DIVISION	EP00000383	01/24/2023	N030	\$101,533.50	(\$15,374.00)	\$86,159.50	02/23/2023	161	11%	
PJ00000132	JO0001	JOINT VENTURE AKTOR S.A. AXAS S.A. EROGEM S.A.	EP00000327	01/27/2023	N030	\$157,700.00	\$0.00	\$157,700.00	02/26/2023	158		
PJ00000833	CO000978	PORT ST LUCIE CITY OF	PJ00000608	01/27/2023	N030	\$11,980.00	\$0.00	\$11,980.00	02/26/2023	158		
PJ00000444	CR00002	CROWN PACKAGING UK PLC	EP00000331	01/30/2023	N030	\$1,053,234.00	\$0.00	\$1,053,234.00	03/01/2023	155		
PJ00000132	QI000001	QUALITY PACK ZET	EP00000333	01/30/2023	N030	\$6,670.00	\$0.00	\$6,670.00	03/01/2023	155		
PJ00000127	RE0001	BALL BEVERAGE PACKING MANTAS O.Y	EP00000332	01/30/2023	N030	\$2,377.92	\$0.00	\$2,377.92	04/30/2023	155		
PJ00000598	CO000348	PRO-MEC ENGINEERING SERVICES	PJ00000615	02/01/2023	N030	\$3,600.00	\$0.00	\$3,600.00	03/03/2023	153		
PJ00000806	CO000228	UNLIMITED SAVORY SYSTEMS	PJ00000619	02/01/2023	N030	\$17,239.98	(\$16,112.13)	\$1,127.85	03/03/2023	153	02%	
PJ00000584	CO000808	LYON SWEETMEAT	PJ00000624	02/08/2023	N030	\$26,988.72	(\$24,750.80)	\$2,237.92	03/16/2023	146	05%	
PJ00000140	BAL002	BALL BEVERAGE PACKAGING LUDSCH GMBH	EP00000338	02/08/2023	N030	\$6,075.00	\$0.00	\$6,075.00	03/11/2023	145		
PJ00000144	CO000023	EKO PARTNERZY SP Z O O	EP00000336	02/08/2023	N030	\$737,325.00	\$0.00	\$737,325.00	03/11/2023	145		
PJ00000144	CO000023	EKO PARTNERZY SP Z O O	EP00000339	02/08/2023	N030	\$737,325.00	\$0.00	\$737,325.00	03/11/2023	145		
PJ00000134	CO000019	BALL AEROSOL PACKAGING UK LTD	EP00000340	02/13/2023	N030	\$296,136.00	\$0.00	\$296,136.00	03/15/2023	141		
PJ00000176	00001444	STRATUS SYSTEMS, LLC	PJ00000629	02/16/2023	Proj 10	\$40,000.00	\$0.00	\$40,000.00	02/16/2023	138		
PJ00000624	CO000830	PORTEX TECHNOLOGIES CORP	PJ00000628	02/16/2023	N030	\$3,741.80	(\$3,530.00)	\$211.80	03/18/2023	138	04%	
PJ00000640	CO000768	JOHNSON MATTHEY INC - NJ	PJ00000631	02/16/2023	N030	\$24,353.15	\$0.00	\$24,353.15	03/18/2023	138		
PJ00000120	HEL001	HELVETIA PACKAGING AG	EP00000342	02/18/2023	N030	\$7,820.00	\$0.00	\$7,820.00	03/20/2023	136		

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