



**Clients First**<sup>™</sup>  
Business Solutions

**ProMRO**  
MAINTENANCE, REPAIR & OVERHAUL CLOUD ERP

# Complete MRO Business Solution





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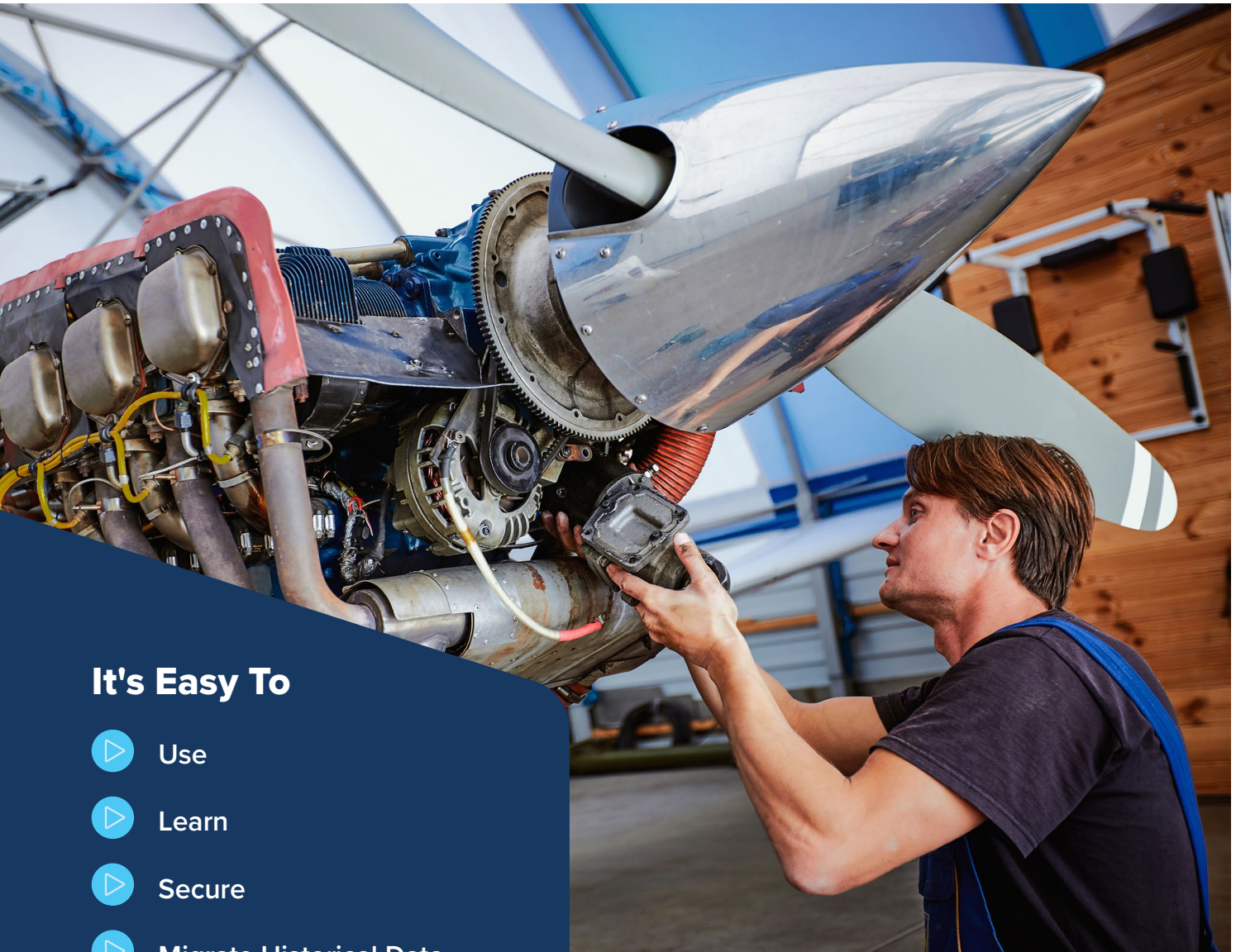
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# Maintenance, Repair & Overhaul – Solution for the MRO Shop



## It's Easy To

- ▶ Use
- ▶ Learn
- ▶ Secure
- ▶ Migrate Historical Data

## Full Multi Capabilities

- ▶ Currency
- ▶ Warehouse
- ▶ Branches
- ▶ Companies

ProMRO is a complete cloud ERP solution tailored to the needs of the MRO business. The solution is built upon Acumatica, a world-class ERP solution that is designed to grow from a few users to thousands. Whether you are a small or large repair shop, you will find that ProMRO has features and capabilities that give you the power to organize and track your business so that you can efficiently grow.

# Features and Processes to Grow your Profitability



## Proactive Customer Relationship Management (CRM)

A fully integrated CRM allows you to go from marketing through sales to post-sales support – keeping all the activity visible to your customer service team. All contacts, communications, activities, and emails are conveniently accessed within CRM. You will have a clear view of what has transpired with a prospect. Additionally, your customer service team will find the 360-degree view of the customer (including their job history) especially helpful to address post-sale questions.



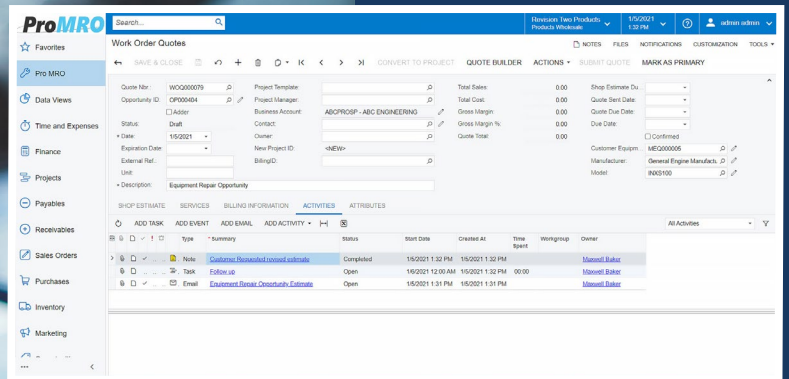
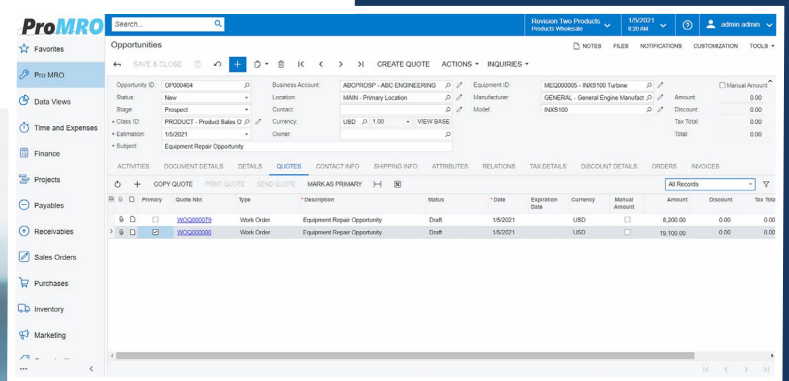
### CRM Features

- ▶ Reporting & Dashboards
- ▶ Integrated Marketing
- ▶ Lead Management
- ▶ Service & Support Automation
- ▶ Customer Self Service Portal
- ▶ Integrated Document Management
- ▶ Account and Contact Management
- ▶ Email Management

## Easy Transformation of Estimates to Sales

It all starts with a qualified lead, a prospect, that creates an opportunity that may become a sale of your services. With ProMRO, you will be able to create visibility of any repair opportunity even before you quote any work.

Estimates are easily created within ProMRO. Each quote is stored within the system allowing you to easily view prior work. In addition, any negotiated special pricing can be automatically applied to the estimate for that customer. Once the quote is accepted it will transform into either a sales order or a service job with a single press of a button.



## Parts and Other Sales - Integrated and Streamlined



**ProMRO** Search: [ ] Revision: Two Products Products Worksheet 1/2/2021 1:27 PM admin admin

Work Order Quotes






Quote No: 10000005 Project Template: PROMRO - PMAIRO Total Sales: 8,200.00 Shop Estimate Dt.: 14/02/21  
 Opportunity ID: 10000008 Project Manager: Total Cost: 4,547.00 Quote Sent Date: 19/02/21  
 Address: Business Account: INDUSPLY - Industrial Supply Inc Gross Margin: 3,653.00 Quote Due Date: 14/02/21  
 Status: Prepared Contact: Gross Margin %: 44.43 Due Date: 20/02/21  
 Date: 19/02/21 Owner: Quote Total: 8,200.00 Customer Equip.: M2000005  
 Extension Date: New Project ID: \*NEW\* Manufacturer: General Engine Manufac.  
 External Ref: BillingID: Model: RNS200  
 Unit: Description: Equipment Repair Opportunity

SHOP ESTIMATE SERVICES BILLING INFORMATION ACTIVITIES ATTRIBUTES


Accept	Template ID	Description	Division ID	Component	Service Package	Revenue Budget	Cost Budget	Margin	Margin (%)	Quote Group ID	Optional
<input checked="" type="checkbox"/>	SP000001	Transport	Repair	Gearbox	SMAL	0.00	0.00	0.00	0.00	MAN	<input type="checkbox"/>
<input checked="" type="checkbox"/>	SP000002	Remove & Unload	Repair	Gearbox	SMAL	200.00	150.00	150.00	50.00	MAN	<input type="checkbox"/>
<input checked="" type="checkbox"/>	SP000003	Disassemble and clean parts	Repair	Gearbox	SMAL	3,150.00	1,800.00	1,350.00	43.86	MAN	<input type="checkbox"/>
<input checked="" type="checkbox"/>	SP000004	Inspect/Photograph/measure/report	Repair	Gearbox	SMAL	2,100.00	1,200.00	900.00	42.86	MAN	<input type="checkbox"/>
<input checked="" type="checkbox"/>	SP000005	Replace Tires	Repair	Gearbox	SMAL	1,200.00	307.00	893.00	74.42	REC	<input type="checkbox"/>
<input checked="" type="checkbox"/>	SP000006	Repair washout around solid end discharge...	Repair	Gearbox	SMAL	1,500.00	1,130.00	370.00	24.67	REC	<input type="checkbox"/>

ProMRO has a Sales Order Management system perfect for part sales. It allows you to accept cash, credit cards, or bill an account. Special order items and drop ship orders can automatically be transformed into purchase orders. There is also a Point-of-Sale module, if you have a store front. There is a complete Pick / Pack / Ship workflow which provides the tools to fulfill your orders and track your backorders easily.

## Additional Features

-  Supplemental parts
-  Superseded parts
-  Core Tracking
-  Subscription orders
-  Powerful parts searches

## Optional

-  PartsBase Integration
-  Customer Portal
-  eCommerce Module

# Operational Efficiencies

## Service Profiles for Consistent, Measurable, Fast Estimates and Quotes

Defining Service Profiles gives you the ability to standardize the estimates of the services you offer, as appropriate. Each Service Profile allows you to establish time estimates, labor types, materials estimates, and miscellaneous expenses. You can then add shop work steps along with any testing criteria that is required. In addition, the quote language can be added so that your quotes uniformly describe the service on your estimates.



## Services Profile Features

- ▶ Templates can standardize how you quote work
- ▶ Services can be priced at standard rates or customer specific rates
- ▶ Accurate costs of services allow you to profitably price your work
- ▶ Prospect friendly quote language can be added to each service
- ▶ Dashboards to monitor your profitability by service type, equipment type, make and model



## Service Projects offer Complete Transparency and Increased Teamwork

A quote can be transformed into a Project which provides unparalleled transparency to both the shop floor and the customer. The shop floor will know what was sold and what needs to be accomplished by having clearly defined tasks to be followed within a Project.

The project will capture and track all activity enabling you to monitor the budget in real-time.

Activities can include labor, materials, and miscellaneous expenses. Dashboards help you identify problems quickly which will help prevent the end of job surprises.

All required tasks, time estimates, and actuals are clearly visible. You will be able to easily identify whether a task was started, how long was spent on it, who charged the time, and when.



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Projects

SAVE & CLOSE RUN PROJECT BILLING CREATE CHANGE ORDER ACTIONS INQUIRIES REPORTS OPEN QUOTE

Project ID: PR0000037 Status: Active Asset: 0.00 Customer Equip: MEQ000006  
 Customer: INDUSUPPLY - Industrial Supply Inc. Hold Liabilities: 0.00 Manufacturer: General Engine Manufact. J  
 Template: Income: 0.00 Model: RNS200  
 Description: Equipment Repair Opportunity Expense: 0.00 Project Warehouse: WHOLESALE - Wholesale J  
 Currency Rate for Budget: USD 1.00 VIEW BASE

SUMMARY TASKS REVENUE BUDGET COST BUDGET BALANCES COMMITMENTS INVOICES CHANGE ORDERS ACTIVITY HISTORY EMPLOYEES EQUIPMENT SETTINGS

Disburse	Component	Task ID	Description	Rate	Unit	Alloc	Bill	Rate	Status	Service Profile ID	Completed (%)	Start Date	End Date	Approver
0	02	GEARBOX	PR0000037.0001	Transport	STANDARD	FIXE	ENDPRICE		Active	SP000001	0.00	15/2021		
0	02	GEARBOX	PR0000037.0002	Remove & Unload	STANDARD	FIXE	ENDPRICE		Active	SP000002	0.00	15/2021		
0	02	GEARBOX	PR0000037.0003	Disassemble and clean parts	STANDARD	FIXE	ENDPRICE		In Planning	SP000003	0.00			
0	02	GEARBOX	PR0000037.0004	Inspect/Photograph/measure/report	STANDARD	FIXE	ENDPRICE		In Planning	SP000004	0.00			
0	02	GEARBOX	PR0000037.0005	Replace filter	STANDARD	FIXE	ENDPRICE		In Planning	SP000005	0.00			
0	02	GEARBOX	PR0000037.0006	Repair wheel around solid end.	STANDARD	FIXE	ENDPRICE		In Planning	SP000006	0.00			

## Service and Profit Tracking in Real-time

The Project in ProMRO is the hub for the repairs. Out-of-scope work is easily handled using adders which preserve the original estimate and clearly showing the out-of-scope work.

Shop personnel time can be entered on the ProMRO timecard either per task or per project or through an optional kiosk at or near workstations. The cost of labor is then automatically applied to the project enabling real-time insight for management to track project profitability.

The screenshot displays the ProMRO software interface for a specific project. The top navigation bar includes 'ProMRO', a search bar, and user information. The main content area shows project details for Project ID P92000027, which is active and held. Key details include the customer 'INDSUPPLY - Industrial Supply Inc.', the description 'Equipment Repair Opportunity', and the currency 'USD'. Below this, there are tabs for 'VIEW TRANSACTIONS' and 'VIEW COMMITMENT DETAILS'. The 'VIEW COMMITMENT DETAILS' tab is active, showing a table with columns for 'Account Group', 'Description', 'Original Budgeted Amount', 'Potential CO Amount', 'Budgeted CO Amount', 'Revised Budgeted Amount', 'Original Committed Amount', 'Revised Committed Amount', 'Actual Amount', 'Hist. Actual Amount in Base Currency', 'Committed Open Amount', 'Actual + Open Committed Amount', 'Variance Amount', and 'Performance %'.

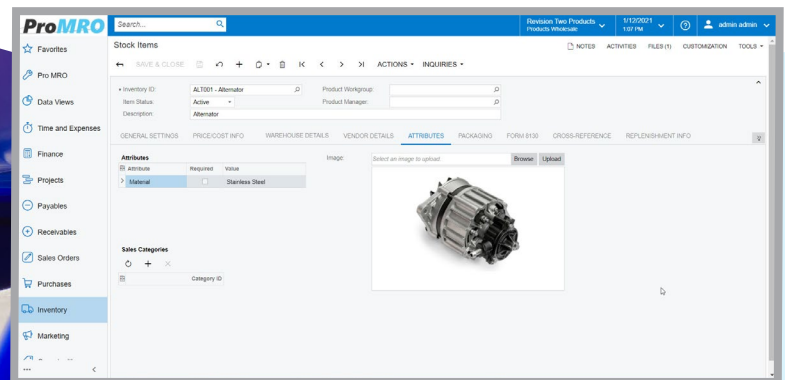
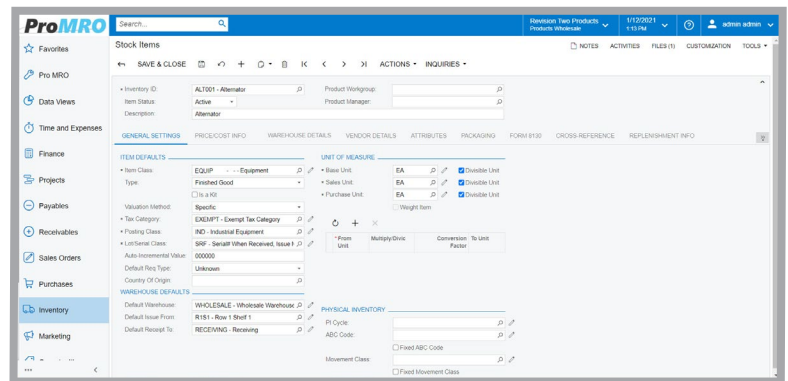
Account Group	Description	Original Budgeted Amount	Potential CO Amount	Budgeted CO Amount	Revised Budgeted Amount	Original Committed Amount	Revised Committed Amount	Actual Amount	Hist. Actual Amount in Base Currency	Committed Open Amount	Actual + Open Committed Amount	Variance Amount	Performance %
<b>Income</b>													
REVENUE	Revenue for projects	8,200.00	0.00	0.00	8,200.00	0.00	0.00	0.00	0.00	0.00	0.00	8,200.00	0.00
<b>Income Totals</b>		<b>8,200.00</b>			<b>8,200.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>8,200.00</b>	<b>0.00</b>
<b>Expense</b>													
LABOR	Labor	4,300.00	0.00	0.00	4,300.00	0.00	0.00	0.00	0.00	0.00	4,300.00	0.00	
MATERIALS	Materials for projects	727.00	0.00	0.00	727.00	10,000.00	0.00	10,000.00	87.00	87.00	10,087.00	10,000.00	
OTHER	Other project expenses	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
<b>Expense Totals</b>		<b>4,987.00</b>			<b>4,987.00</b>	<b>10,000.00</b>	<b>0.00</b>	<b>10,000.00</b>	<b>87.00</b>	<b>87.00</b>	<b>10,087.00</b>	<b>-8,640.00</b>	<b>2.10</b>



## Powerful Inventory Control

Once you purchase the inventory, it needs to be controlled. With ProMRO you have the control features you need - from full traceability for serialized and batch control inventory to multiple warehouses, types of warehouses, and even customer or subcontractor locations. These features provide you with a solid foundation to control your inventory. You can even avoid inventory obsolescence because inventory can be defined to be date controlled (log expiration dates). The various definitions of inventory can then be reported on an inventory aging report or other reports to show locations, quantities, values, and more.

Non-stock inventory and kits are supported in standard ProMRO. There is also an optional WMS module which includes all the features you need to scan inventory in/out of your warehouse.



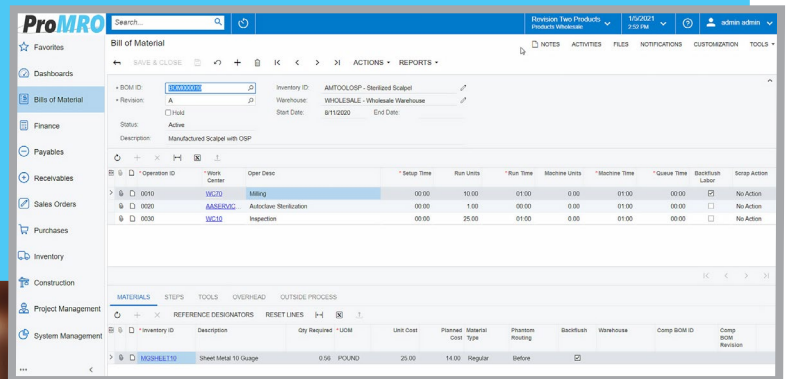
- ▶ Traceability for serialized and batch control inventory
- ▶ Inventory obsolescence tracking
- ▶ Multiple types of warehouses with multiple locations
- ▶ Stock and Nonstock items available

## Production Management

ProMRO is fully integrated with the optional Production Module if your business includes manufacturing. You will be able to add your Bills of Materials which can include routers, subassemblies, tools, and manufacturing notes. Replenishments are automatically calculated by using the Material Requirements Module which will create Purchase Orders and production orders to replace inventory.

The Production Module is also integrated with Sales Orders for make-to-order items providing you with full tracking between the Sales Order and the related production order. That means that the revenue and costs are accurately tied so you have your accurate profit calculated.

- ▶ Bills of Materials and Routers
- ▶ Production Orders
- ▶ Material Requirements Planning
- ▶ Forecasts



# Financial Efficiencies

## Flexible Invoicing

With ProMRO, you control how the invoice is created. The system keeps track of the funds behind the scenes assuring you that all rendered services will be invoiced. The invoice format is customizable to your company's needs presenting a professional appearance to your customers.

- ▶ Invoice language taken from quote language for consistency
- ▶ Details or Results-based invoicing
- ▶ Customizable invoice formats – even customer specific
- ▶ Additional charges clearly displayed, as appropriate



## ProMRO

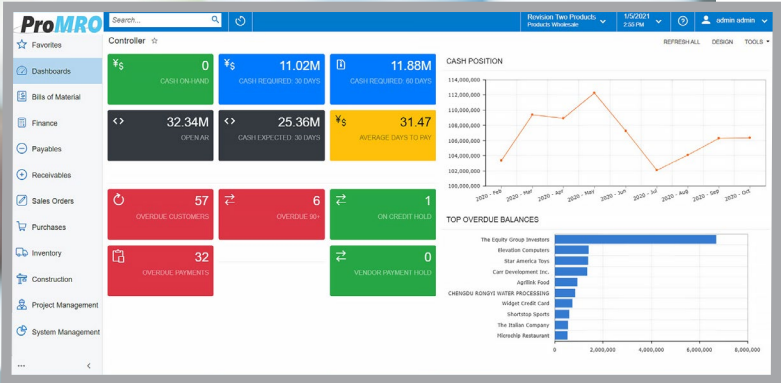
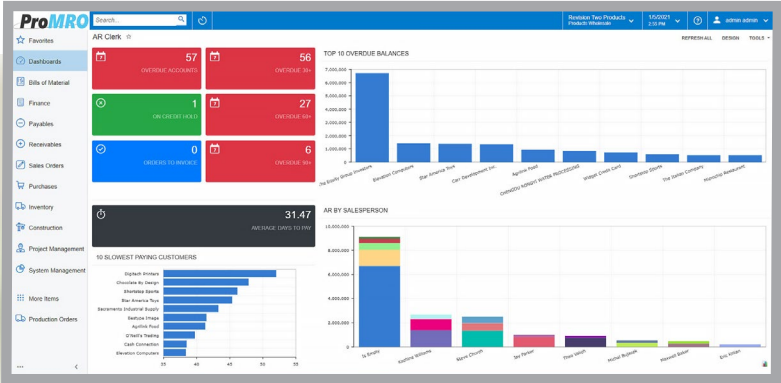
Products Wholesale  
11235 SE 6th St.  
Suite 140  
Bellevue, WA, 98004  
Phone: 206-555-1212  
Web: www.revisontwo.com

**PRO FORMA INVOICE**

Pro Forma Ref. Nbr.: PF00018  
Date: 05-Jul-2021  
Due Date: 04-Aug-2021  
Customer ID: INDSUPPLY  
Currency: USD  
Project ID: PR00000037  
Terms: 30 Days

BILL TO		SHIP TO	
Industrial Supply Inc 1725 S Federal Hwy Boynton Beach FL 33435 United States of America	Industrial Supply Inc 1725 S Federal Hwy Boynton Beach FL 33435 United States of America		








TIME AND MATERIAL						
#	PROJECT TASK	ITEM	DESCRIPTION	QTY.	UOM	UNIT PRICE   AMOUNT
1	Receive & Unload	PROJREV	Receive & Unload	1.00	EA	250.00   250.00
2	Disassemble and clean parts	REVLABOR	Receive & Unload	30.00	HOUR	105.00   3,150.00
3	Inspect/Photograph/measure/report	REVLABOR	Inspect/Photograph/measure/report	20.00	HOUR	105.00   2,100.00
4	Replace Tiles	PROJREV	Replace Tiles	1.00	EA	1,200.00   1,200.00
5	Repair washout around solid end discharge ports	PROJREV	Repair washout around solid end discharge ports	1.00	EA	1,500.00   1,500.00



## Complete Financials

Each financial-related transaction automatically flows into the financial ledgers providing you with up-to-the-minute financials. The system supports multiple company locations, branches, and a nearly infinite sub-account structure to give you the ability to produce financials by region, product type, sale type or any other need you may have.

You will have the ability to create comparative reports, monthly reports, department reports, and any other reports by simply using the financial statement builder. That is, if the over 200 standard reports are not exactly what you want to see.

-  Accounts Receivable
-  Accounts Payable
-  Banking
-  Fixed Assets
-  Payroll
-  Time and expenses
-  Credit card processing

# Additional Modules

## Shop Kiosk

There is User Friendly and then there is Shop Friendly which are not the same. Shop people have a job to do and becoming a computer guru is not one of them which is why we created the Shop Kiosk. It is a Shop Friendly time input for the people in shop to help eliminate the mistakes and headaches normally experienced with trying to get the shop to enter their time.



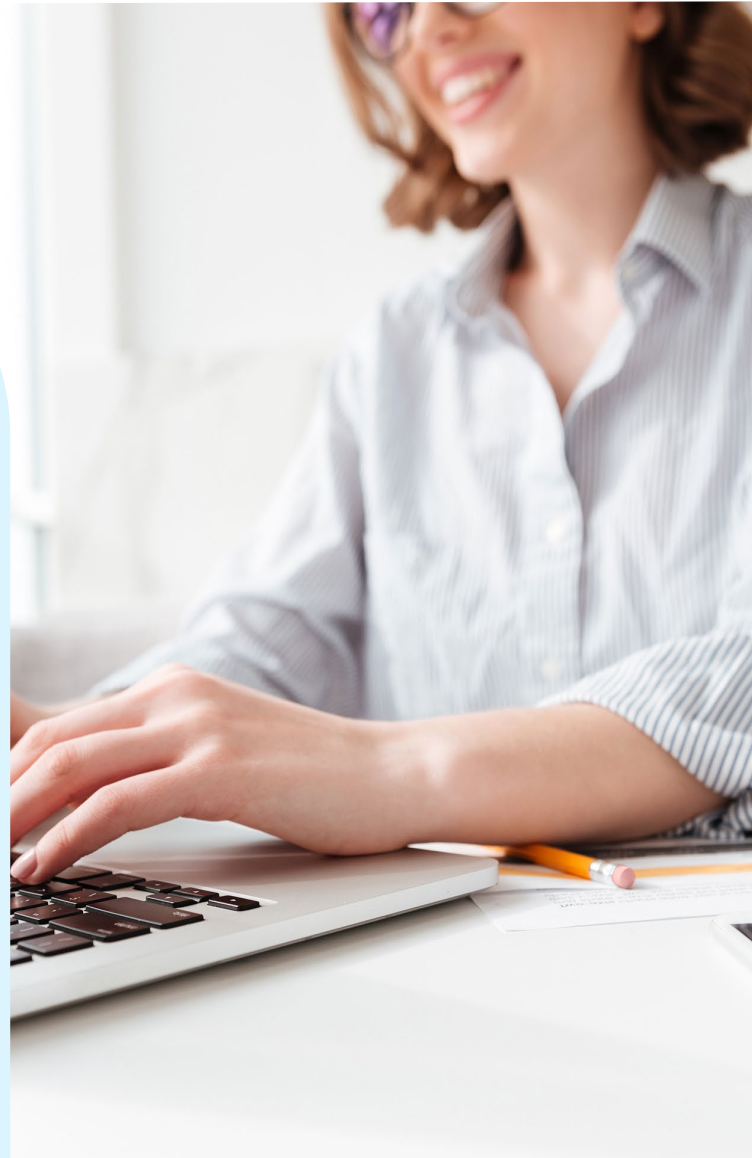
## Vendor Catalog

Simplify your use of vendor catalogs to quote new orders and easily create Purchase Orders without burdening your inventory with single use items and automating the administrative tracking. Transactions are coded giving you the ability to closely monitor the activity for each catalog so you can make an intelligent decision to stock popular special-order items.



## PartsBase Module

For aviation businesses the PartsBase marketplace is a site to purchase and sell inventory. This module is great if you are interested in selling excess inventory or searching for parts across the large community of PartsBase users. Transactions are automated and completely integrated within ProMRO.



Wufoo by Survey Monkey is a popular tool to build online forms without any coding. With our WuConnect you can build your forms and have the responses pass directly into the ProMRO CRM module. This gives you the power to leverage the internet to better service your prospects and customers.



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