



ProMRO
MAINTENANCE, REPAIR & OVERHAUL CLOUD ERP

Complete MRO Business Solution





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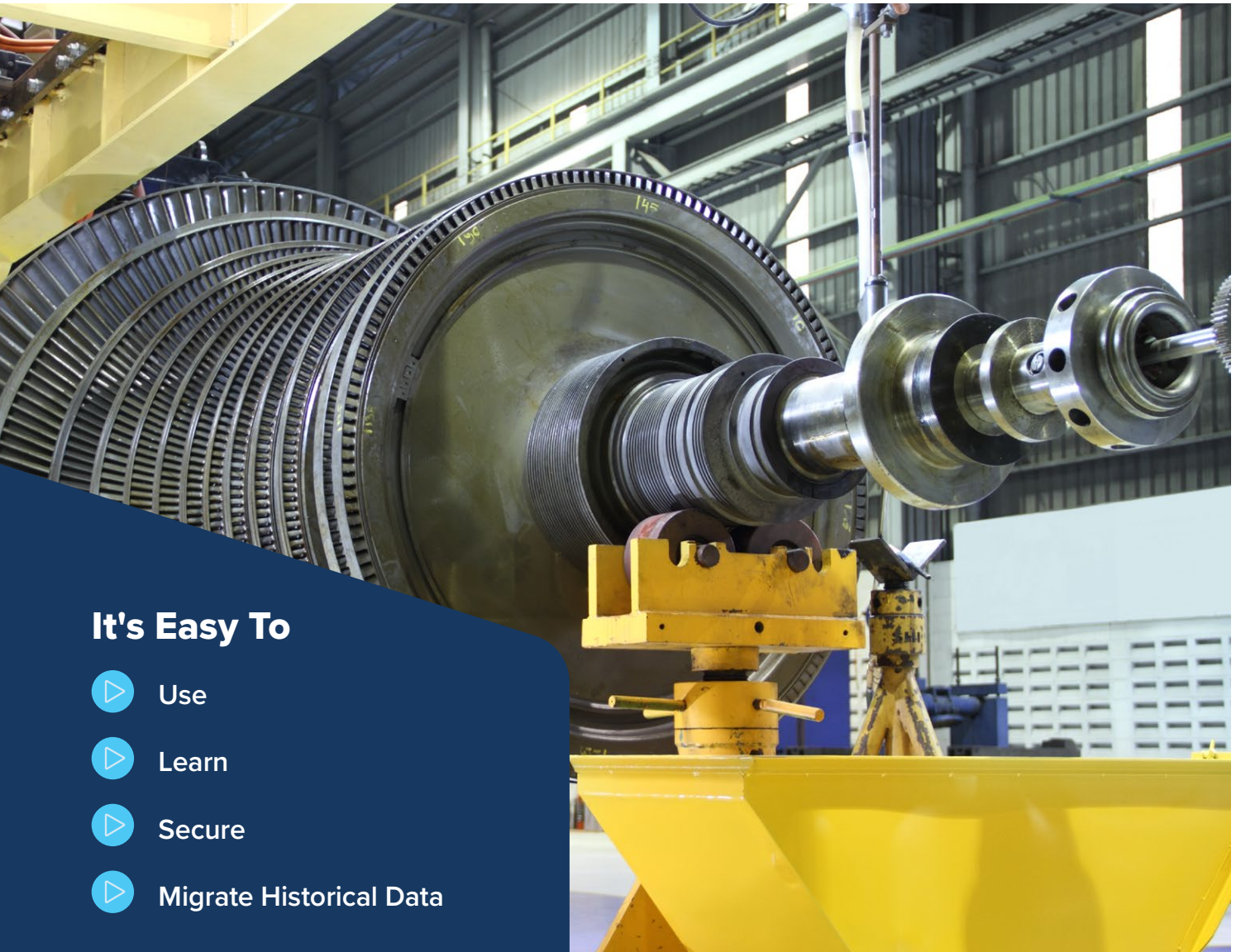
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Maintenance, Repair & Overhaul – Solution for the MRO Shop



It's Easy To

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

Full Multi Capabilities

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

ProMRO is a complete cloud ERP solution tailored to the needs of the MRO business. The solution is built upon Microsoft Dynamics 365 Finance and Supply Chain, a world-class ERP solution. No matter the size or complexity of your 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 Sales Team Support

ProMRO allows you to go from quote through sales to post-sales support – keeping all the activity visible to your sales and customer service team. All contacts, communications, and activities are conveniently accessible within the system. 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 and equipment history) especially helpful to address post-sale questions.

Features

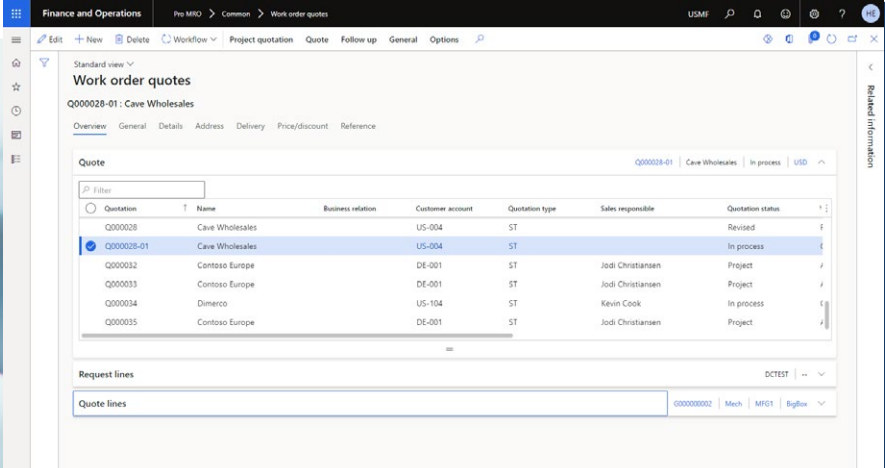
- ▶ Account, Contact and Quote Management
- ▶ Quote workflow streamlines estimate requests. Send requests to the various departments (or branches) that are needed to meet the customer/prospect's requirements along with ability to monitor and be notified when all the requests have been completed. This ensures, a complete, accurate and timely quote generation.
- ▶ Improve accuracy and quote speed with service and rate package templates.
- ▶ Easily track, inquire, and view customer's equipment history as well as record user-defined engineering values.
- ▶ Satisfy every customer quote format by easily editing the quote layout on the fly allowing you to easily meet the needs of a variety of customers. Close work faster with less effort.
- ▶ Integrated Document Management
- ▶ KPI, Reporting and Dashboards

Easy Transformation of Estimates to Sales

It all starts with a qualified lead, prospect, or customer and the creation 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, even the most complex jobs that will require estimates from multiple people in multiple departments, possibly in multiple locations. ProMRO allows you to send requests for estimates along with a deadline date of when the estimate must be completed. This allows for the scheduling and monitoring of tasks to ensure prospects and customers get the information they need when they need it.

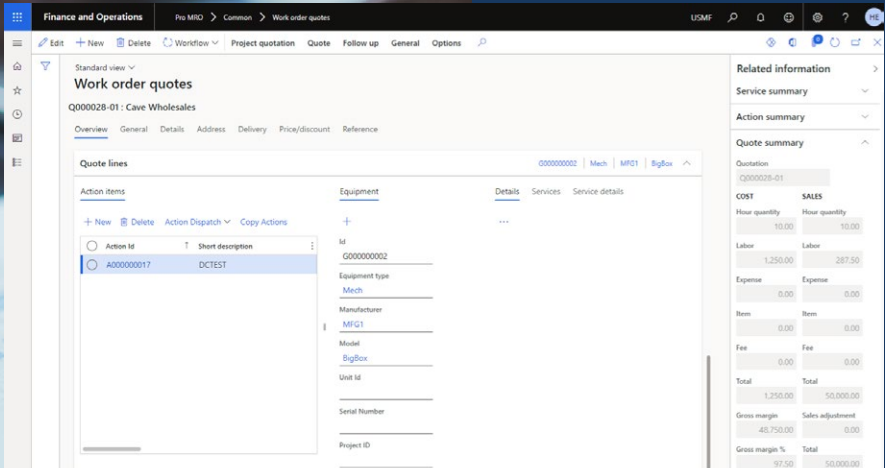
Each quote is stored within ProMRO allowing you to easily view prior estimates or customer history. In addition, any negotiated special pricing can be automatically applied to the estimate for that customer. Once the quote is accepted, it will transform into a service project with a single press of a button.



The screenshot shows the 'Work order quotes' interface in ProMRO. The main table lists quotes with columns: Quotation, Name, Business relation, Customer account, Quotation type, Sales responsible, and Quotation status. The quote 'Q000028-01' for 'Cave Wholesales' is highlighted.

Quotation	Name	Business relation	Customer account	Quotation type	Sales responsible	Quotation status
Q000028	Cave Wholesales	US-004	ST			Revised
Q000028-01	Cave Wholesales	US-004	ST			In process
Q000032	Contoso Europe	DE-001	ST		Jodi Christiansen	Project
Q000033	Contoso Europe	DE-001	ST		Jodi Christiansen	Project
Q000034	Dimerco	US-104	ST		Kevin Cook	In process
Q000035	Contoso Europe	DE-001	ST		Jodi Christiansen	Project

Below the table, the 'Request lines' section shows 'DCTEST' and the 'Quote lines' section shows 'Q00000002' with details for 'Mech' and 'MFG1'.



The screenshot shows the 'Quote lines' details for 'Q00000002'. The 'Action items' table lists 'A000000017' with description 'DCTEST'. The 'Equipment' section shows details for 'G000000002', including 'Mech', 'MFG1', and 'BigBox'. The 'Related information' sidebar on the right shows a 'Quote summary' table.

Quotation	Hour quantity	Hour quantity
Q000028-01	10.00	10.00
Labor	1,250.00	287.50
Expense	0.00	0.00
Item	0.00	0.00
Fee	0.00	0.00
Total	1,250.00	50,000.00
Gross margin	43,750.00	0.00
Gross margin %	97.50	50,000.00

Parts and Other Sales - Integrated and Streamlined



Service details | S000000003: S000000003
Standard view
S000000003: Mechanical service

+ New + Delete +B Outdent +B Indent + Move up + Move down Quote language Expand to v

View: Scheduling

WBS ID	Task name	Category	Multiplier	Hours per part	Quantity	Calc. Per Se
S000000003	Tear down and inspect	Journeyman	1	10.00	10.00	

WORKCENTER INSTRUCTIONS
Tear down and inspect.
Suggest additional procedures.

+ New + Delete Product dimension Type Filter: All

Line number	Transaction type	Project category	Description	Item number
1.000000000	Item	Project	HDMI 6' Cables	A0001

ProMRO utilizes Dynamics 365 Supply Chain full-fledged inventory system as well as its project management and accounting module to provide world-class functionality to MRO operations.

Feature Highlights

- ▶ Supplemental parts
- ▶ Superseded parts
- ▶ Core Tracking
- ▶ Subscription orders
- ▶ Bill equipment storage fees

ProMRO offers “quick” functionality that will allow you to process parts only sales or small jobs quickly. There is also a complete Pick / Pack / Ship workflow which provides the tools to fulfill your orders and track backorders easily.

ProMRO allows you to create a template for each service your company provides. Services can be grouped and sold as a package. These approval-controlled templates can be comprised of unlimited labor components as well as unlimited parts.

Operational Efficiencies

Service Profiles for Consistent, Measurable, FastEstimates 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.



The image shows a large industrial turbine component, likely a compressor or turbine section, in a workshop setting. The component is made of polished metal and features numerous blades. It is mounted on a yellow support structure. In the background, other similar components and workshop equipment are visible.

Below the image is a screenshot of a software interface for project management and accounting. The interface displays a 'Standard view' for a project titled '000236.034.01.01: Container Repair'. The view shows a table of tasks with columns for Effort in hours, Workcenter / Role ID, Resources, Shop task ID, Factored rate, Total cost price, and Total sales price. The tasks listed are:

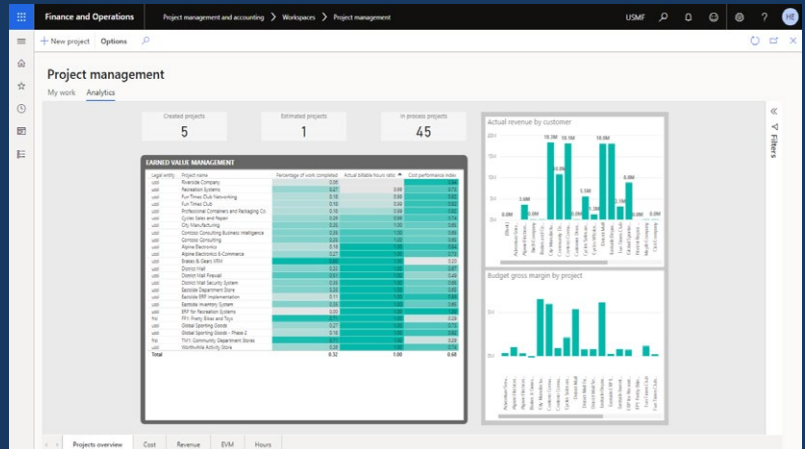
Effort in hours	Workcenter / Role ID	Resources	Shop task ID	Factored rate	Total cost price	Total sales price
18.00					2,552.00	3,510.00
5.00	Inspect		1050	127.00	635.00	925.00
10.00	Machining		0025	135.00	1,350.00	1,850.00
2.00	INDT		1116	145.00	290.00	370.00
1.00	Team member		0120	127.00	127.00	185.00

The interface also includes a 'Delete' button, a 'Product dimension' dropdown, and a 'Type Filter' dropdown. The 'Type Filter' is currently set to 'All'. The 'Delete' button is labeled 'Delete'.

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.



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.

The screenshot shows the 'Released product details' form for 'P3000 : White paint - Gallon can'. The form is divided into several sections: 'General', 'FURTHER IDENTIFICATION', 'ADMINISTRATION', and 'Purchase'. The 'General' section includes fields for Product type, Product subtype, Product, Product service type, Item number, and Product number. The 'FURTHER IDENTIFICATION' section includes fields for Product name, Search name, and Description. The 'ADMINISTRATION' section includes fields for Storage dimension group, Tracking dimension group, Item model group, and Reservation hierarchy. The 'Purchase' section includes fields for Purchase order, Unit, New price tolerance group, Price quantity, and Multiline discount. A 'Related information' sidebar on the right shows a product image of a white paint can and links to Retail channels, Related product variants, Product change cases, and Assortments.

The screenshot shows the 'Released product details' table view. The table has columns for Item number, Product name, Search name, Product type, Product subtype, and Product service type. The table lists several products, including 'Electrical Assembly', 'Magnet Assembly AX-21', 'Coil assembly CK-987', 'Basket assembly BA0183', 'Coil assembly CK-988', 'Magnet Assembly AX-22', 'Coil assembly CV-987', 'PCB Assembly', and 'Cone and coil assembly'.

Item number	Product name	Search name	Product type	Product subtype	Product service type
D0012	Electrical Assembly	Electrical Assembly	Item	Product	Not specified
E00001	Magnet Assembly AX-21	MagnetAssemblyAX21	Item	Product master	Not specified
E00002	Coil assembly CK-987	CoilassemblyCK987	Item	Product master	Not specified
E00003	Basket assembly BA0183	BasketassemblyBA0183	Item	Product master	Not specified
E00012	Coil assembly CK-988	CoilassemblyCK988	Item	Product master	Not specified
E00014	Magnet Assembly AX-22	MagnetAssemblyAX22	Item	Product master	Not specified
E00015	Coil assembly CV-987	CoilassemblyCV987	Item	Product master	Not specified
M0050	PCB Assembly	PCB Assembly	Item	Product	Not specified
M0201	Cone and coil assembly	Cone and coil assembly	Item	Product	Not specified

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

Production Management

If your business includes manufacturing, you'll be pleased to know that ProMRO is fully integrated with the Dynamics 365 Finance and Supply Chain Management production module, which supports discrete, process, lean and mix-mode manufacturing. You will also be able to track routes as well as manage tools and resources. Replenishments are automatically calculated through MRP which will create and schedule purchase orders and production orders to replace inventory.

Purchase orders and production orders are linked to the job providing you with full tracking capabilities as well as accurate costing and profitability calculations.

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

The screenshot displays the 'BOM version' form for 'D0012 : Electrical Assembly'. The form is divided into several sections:

- IDENTIFICATION:** BOM (D00110), Name (Electrical Assembly).
- PRODUCT REFERENCE:** Item number (D0012), Product name (Electrical Assembly).
- INVENTORY DIMENSIONS:** Site (11).
- VALIDITY:** From date (1.00).
- STATUS:** Approved (Yes), Action (Yes).

Below these sections is a table titled 'Bill of materials lines' with the following data:

Item number	Site	Warehouse	Resource cons.	Quantity	Per series	Unit	Configuration group
M0050	1	11		1,0000	1	ea	
M0051	1	11		1,0000	1	ea	

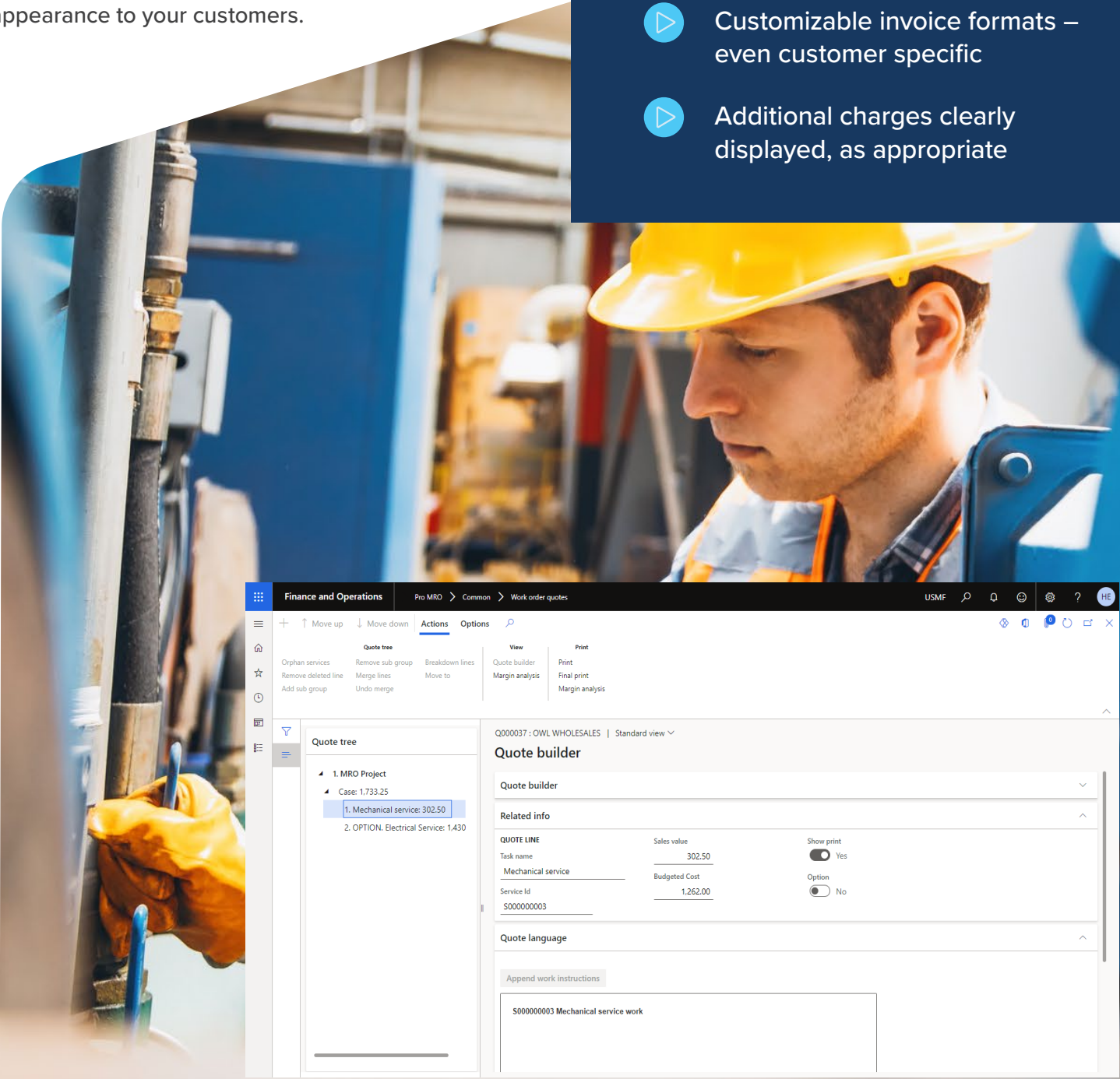


Financial Efficiencies

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



Finance and Operations | Pro MRO > Common > Work order quotes | USMF

Quote tree

- 1. MRO Project
 - Case: 1,733.25
 - 1. Mechanical service: 302.50
 - 2. OPTION. Electrical Service: 1,430

Quote builder

Q000037: OWL WHOLESALERS | Standard view

Quote builder

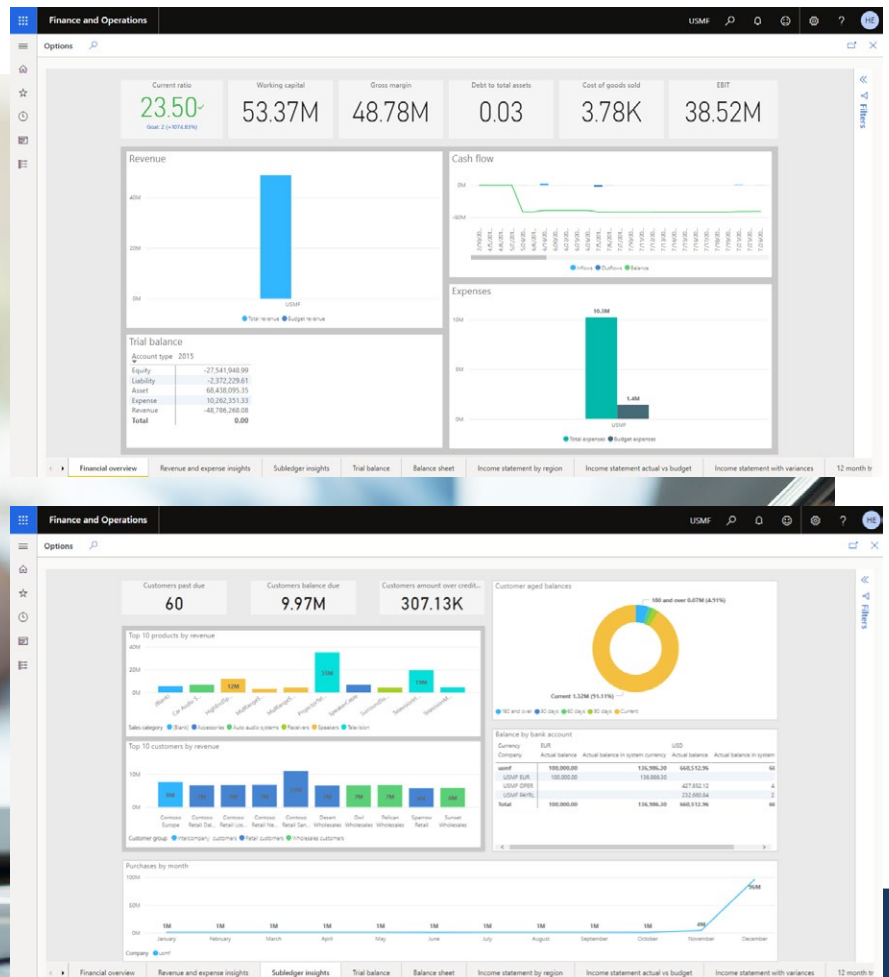
Related info

QUOTE LINE	Sales value	Show print
Task name Mechanical service	302.50	<input checked="" type="checkbox"/> Yes
Service Id S000000003	Budgeted Cost 1,262.00	Option <input type="checkbox"/> No

Quote language

Append work instructions

S000000003 Mechanical service work



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
- ▶ Time and expenses
- ▶ Credit card processing



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Microsoft Dynamics 365 Finance and
Supply Chain Management