



**ProjectPro helped the technology integrator with a centralized database accessible to all the operational staff and managers.**

## **THE CLIENT**

The client is a high-growth organization that provides a complete integration system and connects businesses with advanced technology solutions by designing, selling, installing, and maintaining communication systems for voice, data, security, surveillance, multimedia, and structured cabling.

## **CHALLENGES**

The client was looking for an application that could provide them with easy access to a centralized database containing project operations and management information and wanted an integration for D365 Sales and Dynamics Field Services with D365 Business Central. Here are the key challenges experienced by the client:

- Improper material tracking and inventory management
- Multiple systems used for financial management, payroll, project management, inventory, and CRM operations
- Manual financial reporting
- Complexity to record and save customer information
- Discrepancies in quote comparisons, product evaluation, and logistics pursuit
- Cumbersome time tracking, resource scheduling, and expense reporting

## **APPROACH & SOLUTION**

Our approach was to avail the client with a centralized database accessible to all the operational staff and managers for handling operations, inventory tracking, and management reporting.

We ensure to take care of the pain points shared by the client team, and the discovery of the processes managed currently was scheduled to understand the needs of the implementing Microsoft Dynamics applications.

## TECHNOLOGY USED

Microsoft Dynamics Business Central, ProjectPro, D365 Sales and Dynamics Field Services

## MODULES IMPLEMENTED

- Financial Management
- Sales & Receivables
- Purchase & Payables
- Inventory Management
- Job Management/ProjectPro
  - Job Quote & Job Material Planning
  - Progress Billing
  - Time & Material Billing
  - AIA Billing
  - Subcontracting Management
- Field Service Management
  - Work Order Handling
  - Resource Scheduling
- Sales Management
  - Lead & Opportunity Management
  - Project & Service Quote / Proposal Handling
- Work Order Handling

## THE TEAM

We assigned a project manager to handle implementation and support for the client. The project manager was responsible for the in and out activities and processes throughout the implementation and communication on the operational front with the client.

Also, a business analyst was appointed for discovery, documentation, and configuration of D365 Business Central, ProjectPro, D365 Sales, Dynamics Field Services, respectively. And two developers for D365 Sales -Business Central Integration and Field Services- Business Central Integration

## THE RESULTS

With better design and the rapid implementation of ProjectPro, the client is now effectively managing:

- Access to a centralized database accessible to all the departments with integrated information
- Real-time inventory tracking & real-time project costing
- Much more detailed resource scheduling and resource-wise time tracking
- Procurement of material after multiple approvals minimizing the purchase of over the need stock
- Enhanced lead and opportunity handling as well as resource and work order management





### About ProjectPro

Based on the concept of cloud, ProjectPro is a SaaS-based construction accounting and enterprise resource planning software based on Microsoft Dynamics 365 Business Central.

ProjectPro helps businesses streamline their processes with better insights into the overall project costs, resource requirement & allocation, which offers precise and timely information. Integrate all of your project accounting, management, labor & resources management, material planning, and customer relationship management through a dedicated solution. Streamline accounting processes & strengthen control of your organizations projects with ProjectPro. With integrated data, intelligent transaction processing, and robust analytical and reporting capabilities, you can reduce the time and effort it takes to access meaningful information necessary to make good business decisions.

**20+**  
Years in Business

**100+**  
Projects

**200+**  
Years of collective  
Team Experience

**8**  
Global Locations

#### Highly qualified professionals

We have highly qualified professionals working with us to deliver our Dynamics projects. These include Functional Consultants (CPA, Industry Expert), Technical Consultants, Microsoft Certified Professionals and, Project Managers (PMP & PMI-ACP, Dynamics Sure Step).



Headquarters at Rochester

### About Netsmartz

#### Netsmartz, our parent company

Headquartered in Rochester, New York and with multiple offices across the globe, Netsmartz is a CMMi3 & ISO 9001:2008 certified company. Formed over 20years ago, we currently have over 1000 employees, a rich experience of successfully executing 2000+ projects and working with small companies to Fortune 1000 clients.



PROJECTS  
EXECUTED



TEAM  
MEMBERS



YEARS IN  
BUSINESS



GLOBAL  
LOCATIONS



CUSTOMER  
SATISFACTION

GLOBAL ADDRESSES

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Start growing with ProjectPro today.

If you need to know more about how we can help your business thrive with Dynamics Business Central/NAV, let us show you how it works.

A member of our team will give you a detailed demo based on your specific needs.



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Company Certifications

