

# Engineer To Order

**Dynamics Software Engineer To Order for Microsoft Dynamics™ AX supports your project organization featuring: quotation management, calculation management, advanced project management, packaging and shipments, on-site installation and service management. At the same time you have direct access to all the data you need about the financial aspects of a project, i.e. like estimate to complete.**

## Key benefits:

- ✚ Helps processing tenders
- ✚ Supports free definable design of quotations and related project calculations



- ✚ Enables continuous project calculation or placing of preliminary orders
- ✚ Immediate visibility of actual project status at any time

Engineer To Order is the solution for construction, installation and complex project management and manufacturing industries. The solution has been developed based on our practical experience. For many years we consulted for medium and large-sized businesses in the industrial sector of plant and machine construction. We have consequently used this knowledge to develop our vertical solution based on Microsoft Dynamics™ AX.

Based on the requirements of many customer projects a standard software solution for that industrial sector has been created.

Nowadays increased speed and flexibility are demanded from enterprises. Pressure from competition is constant. In order to face this pressure you need tools which don't constrain but support you in your daily work: Tools which

are easy and intuitive to handle, tools you can easily adapt to new requirements by yourself, tools which are uncomplicated in integrating with other systems.

The Engineer To Order solution offers you a highly sophisticated technological ERP-Solution which supports your company in your ambition to grow.

The exclusive use of the Microsoft Dynamics™ AX - Development Environment means that the ideal integration of the solution can be considered as an advancement of the Microsoft Dynamics™ AX standard.

The benefit for the Microsoft Dynamics™ AX users is that all divisions of a company can utilize the same standardized and intuitive user interface and have access to the same database.

## What are the features of Engineer To Order for Microsoft Dynamics™ AX?

- ✚ Advanced Project Management
- ✚ CRM Quotation for the Project Business
- ✚ Import and process of Tender Documents
- ✚ Project cost planning and continuous calculation
- ✚ Project Items and BOMs
- ✚ Item and BOM (Versions) Management
- ✚ Class Lists of Characteristics
- ✚ Project specific Materials Management
- ✚ Preliminary Orders
- ✚ Project picking and Project specific Delivery
- ✚ Invoicing for the Project Business
- ✚ Project Controls
- ✚ Project - status and budget reconciliation based on Progress or after Completion
- ✚ Financial tools
- ✚ Cost Accounting tools

## Immediate Benefit

This solution enables you to perform your day-to-day business from the very beginning: the processing of tenders, the free-definable design of quotations and related pre-calculations, the continuous project calculation or placing of preliminary orders. Most importantly, you have total visibility into the current state of your project at any time!

With Engineer To Order your project business gains more transparency. The push of a button provides insight into your profit margin. Briefly, this Engineer To Order Solution is capable of handling all your business processes and therefore strengthens your competitive position since Microsoft Dynamics AX already contains eBusiness, Supply

Chain Management (SCM), Customer Relationship Management (CRM).

## The most important functions at a glance Advanced Project Management

- Creation of organization specific Project Structures
- Representation of Time & Material and Fixed Price Projects
- Forecasting and Budgeting of Material, Internal and External Labor, as well as other costs
- Presentation of the Project Schedule in Microsoft Project

## CRM-Quotation for the Project Business

- Free definable Design of Quotation Structures
- Quotation preparation without Item No. possible
- Import and Processing of Tender Documents
- Insertion of Pictures, Drafts, or technical Drawings
- Flexible Formatting of the Quotation in Microsoft Word (fig.1)

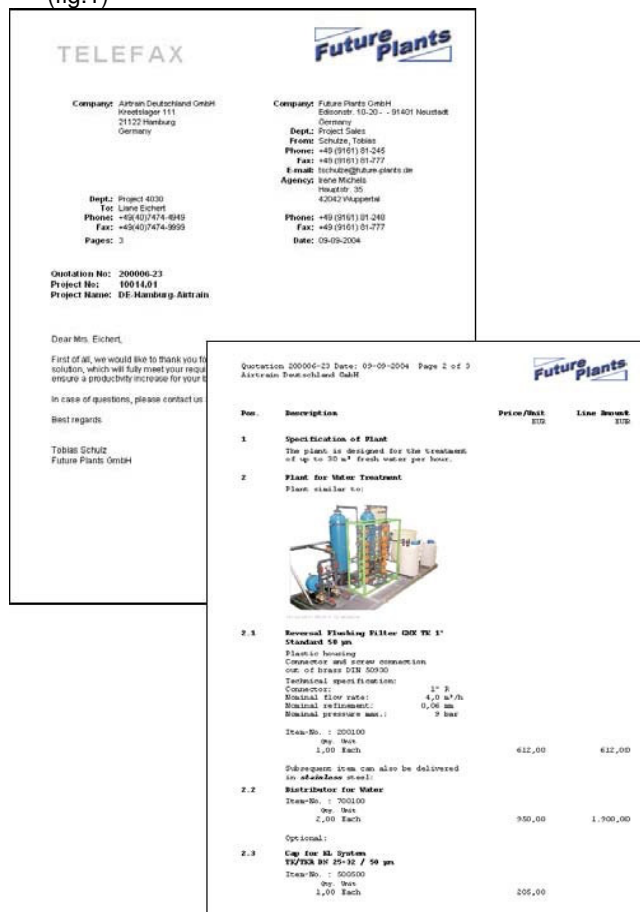


Fig. 1: Representation of quotation

## Project Cost planning and continuous calculation

- Free definable planning calculations based on a multilevel break even analysis (fig.2)
- Calculations based on titles and positions (no item IDs. required)
- Continuous Calculation and Final costing of Projects
- Quick Entry of the Calculation base

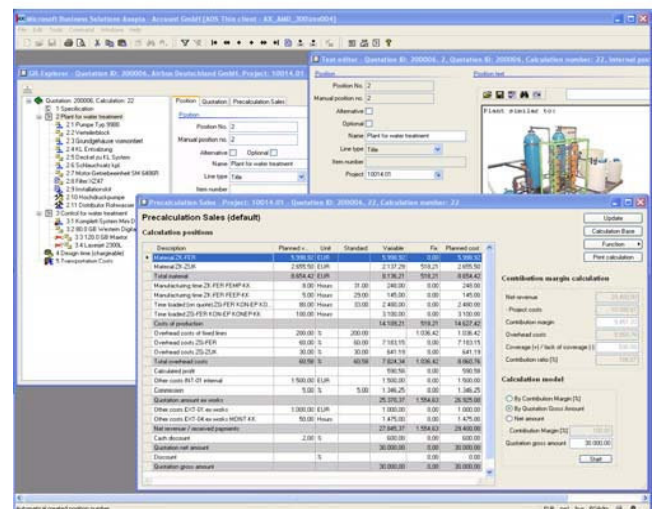


Fig. 2: Project - Precalculation

## Item and BOM (Version) Management

- Sales BOMs
- Project BOMs
- Change Management of BOMs
- Free definable class lists of characteristics

## Project-related Materials Management

- Disposal and Procurement with reference to Project
- Preliminary order process for items with a high procurement lead time
- Item Arrival process
- Project picking and project related Delivery

## Invoicing for the Project Business

- Creation of accounts and Final Invoices
- Automatic Determination of the final invoice amount based on previous Invoices or payments received
- Enhanced Functionalities for Editing of Project Invoices

## Project Controls

- Monitoring of revenue, costs and the financial statement
- Comparison of Calculations

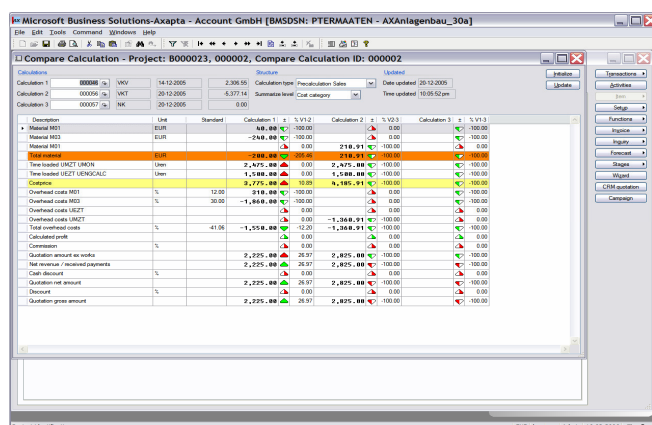


Fig. 3: Project calculation Comparison

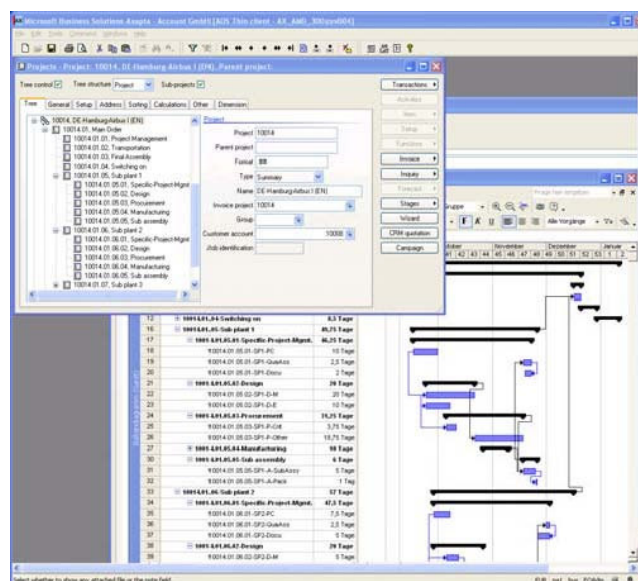


Fig. 4: Project Forecast

## Project Performance Assessments

- Assessments based on Project status or after completion of the project

## Financial Tools

- Posting of Project costs and revenue in the Financial Accounting Form with reference to the related Project
- Extensive Analysis and Reports.
- Special Analysis Functionality according to Basel II terms.

## Cost Accounting Tools

- ✚ Cost center accounting with different rate assessments in order to determine the burden costs of the Projects
- ✚ Multi-level Breakeven Analysis for the Project
- ✚ Setting up of a Cost Unit/Purpose when Creating a new Project
- ✚ Automatic Classification of Cost Unit within the Cost Unit Structure

Engineer To Order is excellent in the industrial sectors of plant and machine construction. Modules like “Integrated Project Forecasting” with MS Project (fig.3) can also be used in other industrial sectors, such as:

- Process
- Maintenance / Services

## Our Solution

## Benefit from the Potential

As globalization accelerates, so does the competition. Vendors are pricing in lower margins, banks and clients expect transparency from their suppliers. Financial flexibility for processing an order becomes lower, however, the project risks are rising because of the current cost pressure.

For this reason the quality of your risk management is the key to your success and rating according Basel II terms.

Successful companies now have to gain advantages compared to their competitors by using qualified Project Management methods.

Our solution supports you as you face-up to this challenge. With the implementation you will get an integrated ERP-System, that has been developed and dedicated for the needs of an Engineer To Order type of company, e.g. Plant Constructors.

## A professional Network requires strong Partnerships

We offer our Solution and consulting services in co-operation with qualified co-operation partners worldwide. Dynamics Software is a member of VDMA (Association of the German machine and plant construction industry).

## Further Information

We are very pleased, if we have aroused your interest for our application. Our staff members are looking forward to present you our solution. For further information, please contact us at any time.

## About Dynamics Software

Dynamics Software Engineer To Order is developed and maintained by Dynamics Software AG. Dynamics Software is a certified Microsoft Dynamics™ AX Independent Software Vendor (ISV). For more details you can contact the Dynamics Software Sales team.

Microsoft Dynamics™ AX is developed by Microsoft Corporation and marketed and distributed worldwide.

This information is based on Dynamics Software Engineer To Order for Microsoft Dynamics™ AX, version 3.0. The solution is available in multiple languages

## Address

Dynamics Software	Dynamics Software
Zonnebaan 9A	Bahnhofstraße 35
3542 EA UTRECHT	71272 RENNINGEN
The Netherlands	Germany
<a href="http://www.dynamicssoftware.com">www.dynamicssoftware.com</a>	
phone +31 30 2408640	phone +49 7159 8040-0
fax +31 30 2408641	fax +49 7159 8040-999
e-mail: <a href="mailto:info@dynamicssoftware.com">info@dynamicssoftware.com</a>	

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## Awarded

In 2003 Dynamics Software received the Microsoft Corporation Finalist-Award „ERP Solution Developer of the year“ as the Winner for the Western European region. In total 1200 candidates applied for the awards.

## Data summary sheet

### Dynamics Software Engineer To Order for Microsoft Dynamics™ AX

Main features	Description
QUOTATION MANAGEMENT	<ul style="list-style-type: none"> <li>Import of (industry) predefined quotation templates (GEAB, etc.)</li> <li>Creation of quotations with free definable titles and positions using the Explorer structure</li> <li>Flexible quotation calculation with alternative calculation models (variable expenses, cost price, distribute engineering/assembly time over all titles and/or positions, etc.)</li> <li>Quotations with lines for standard items, customer specific items, quotation items, configured items (using product builder), text, etc.</li> <li>Multiple quotation calculations per quotation, Multiple quotation versions</li> <li>Flexible quotation lay-out (MS Office-integration), using (rich) text elements, pictures, formats, level of detail, etc. – all by parameters in the quotation</li> </ul>
PROJECT MANAGEMENT	<ul style="list-style-type: none"> <li>Flexible project structure, free definable number of levels and network points /subprojects</li> <li>Quick entry based on free definable templates + wizard functions</li> <li>Support for different project types, like fixed price, time &amp; material and internal projects/hours</li> <li>Project management by project/networkpoint: <ul style="list-style-type: none"> <li>Work-Break-Down-Structure</li> <li>Planning</li> <li>Activities</li> <li>Milestones</li> </ul> </li> <li>Financial control by project/network point using budgets for material costs, hours, subcontracting and other project related expenses</li> <li>Extensive analysis possibilities by project budget, revenue, cash flow, etc.</li> <li>Consolidation and aggregation to each level</li> <li>Link between project structure and quotation structure</li> <li>Bi-directional interface with MS-Project</li> </ul>
CALCULATION MANAGEMENT	<ul style="list-style-type: none"> <li>Quotation calculation based on quotation structure that could consist of titles, positions, text, item lines, special lines etc.</li> <li>Engineering calculation (estimate) based on items, BOM's, customer specific (project) BOM's, routings, activities, etc.</li> <li>Growing estimates, time phased as quoted and as designed. Growing actual costing</li> <li>Comparison of calculations of the 3 calculation models with differences analysis</li> <li>Estimate to complete in numbers, estimate to complete using OLAP</li> </ul>
PACKAGING AND SHIPMENTS	<ul style="list-style-type: none"> <li>Disassemble, packaging and shipment</li> <li>Intelligent support for packaging and assembly of shipments (content)</li> <li>A shipment consists of multiple shipping units (container, pallet, etc.)</li> <li>Registration of components/parts per shipping unit</li> <li>Documents with table of content per shipping unit</li> <li>Optional pro forma invoices per shipment/unit</li> </ul>

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Main features	Description
ON-SITE INSTALLATION & SERVICE MANAGEMENT	<ul style="list-style-type: none"> <li>Administration of service objects</li> <li>Multi-level/dimensional objects</li> <li>Maintenance contracts</li> <li>Service call registration, follow-up and tracking (Customer Help Desk)</li> <li>Service orders</li> <li>Allocation and scheduling of service engineers and material</li> <li>Invoicing of spare parts and services (based on service contract)</li> <li>Etc.</li> <li>See our factsheet for service management for more information</li> </ul>
FINANCIAL MANAGEMENT	<ul style="list-style-type: none"> <li>Type of projects: <ul style="list-style-type: none"> <li>Fixed price</li> <li>Time and material</li> <li>Internal</li> </ul> </li> <li>Invoicing: <ul style="list-style-type: none"> <li>Milestones to support deposits, pre/upfront/down payments, percentage/partly payments, etc.</li> <li>Automatic generation of a final invoice based on previous payments.</li> <li>Support for several profiles for percentage/part and final invoices</li> </ul> </li> <li>Revenue recognition, result realization and Work-in-Progress management: <ul style="list-style-type: none"> <li>Based on delivered/accepted projects or subprojects.</li> <li>Based on percentage complete</li> </ul> </li> <li>Flexible definition of dimensions: <ul style="list-style-type: none"> <li>Cost carrier</li> <li>Cost center</li> <li>Project, Department</li> <li>Company</li> </ul> </li> <li>Flexible multi-level determination of results, based on: <ul style="list-style-type: none"> <li>Product (groups)</li> <li>Departments</li> <li>Business-units</li> <li>Companies</li> <li>Projects</li> </ul> </li> </ul>