Expenses Management App
Microsoft Dynamics AX/365

An Introduction

What Do We Have To Show For It All?

FOLIO3 IS TECHNOLOGY DEVELOPMENT PARTNER TO LARGE ENTERPRISES, SMEs, AND STARTUPS.

We are alums of Intel and Silicon Graphics; techies from MIT; entrepreneurs from Silicon Valley; big believers in technology's potential; bigger believers in human potential.

500+
Clients (banks, booksellers, software giants, game start-ups) that trust and value us enough to be our best spokespersons.

1k+
ERP, AI, cloud, web, and mobile solutions made with love, integrity and lots of caffeine.

350+
People who understand the dual commitment at Folio3: **Customers first, Employees forever.**

18+
Years of Experience in serving top quality solutions globally.

Partial Client List

Mercedes-Benz · squaretrade · JAGUAR · LAND ROVER · DELL

COLGATE-PALMOLIVE · SAP · CISCO · HONDA The Power of Dreams · MERCK Be well

ROCKETINTERNET · AirMedicalGroup Holdings · SONY COMPUTER ENTERTAINMENT · CMA CGM · KKR

AGRI BEEF CO. · Alere · Standard Chartered · MIT · zoetis · true fruit

ANGUS THE BUSINESS BREED · KAYAK · Essential · BARNES & NOBLE · Green Giant Fresh · FIRST REPUBLIC BANK It's a privilege to serve you

What We Do

Accredited Microsoft partner with over 12 years of experience and a one-stop shop for all your Microsoft Dynamics needs.

Microsoft Partner
Gold Enterprise Resource Planning

Microsoft Partner
Silver Application Development

Microsoft Partner
Cloud Solutions Provider

MCSE
Mobility
Earned 2017

MCSA
Dynamics 365
Earned 2017

Mobility
6 Apps
20+ Custom Apps

Integration
6 Connectors
15+ Custom Integrations

Implementation & Customization
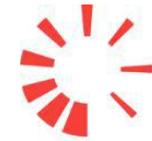Expertise on AX 2009, 2012 & 365
Multiple Deployments

Business Intelligence
6 Pre-built Dashboards
20+ Custom Cubes Developed

Dynamics Clientele

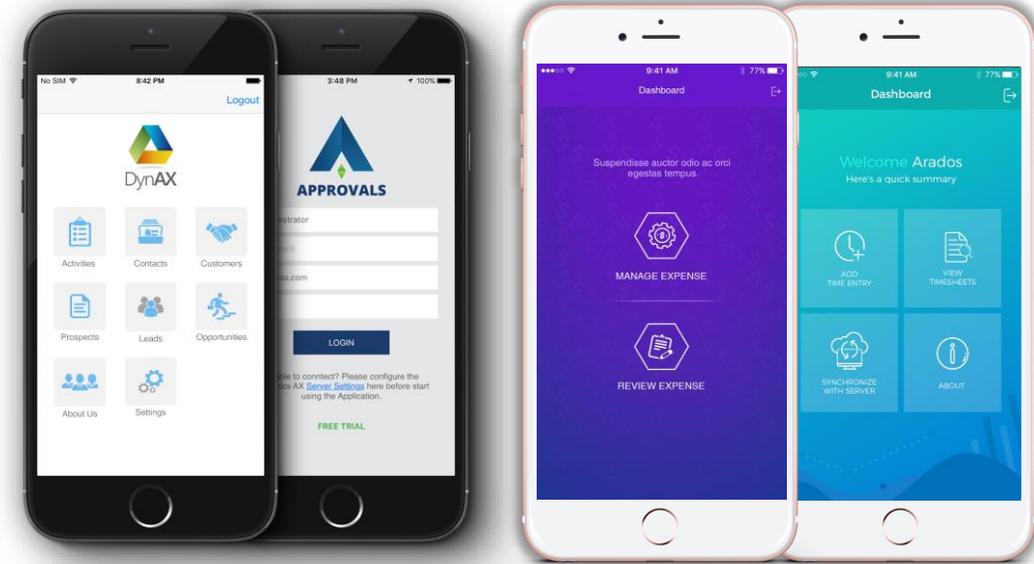# AX MOBILITY

UNITED STATES OF AMERICA

AGRI BEEF CO.
DYNAX

MidContinent
DYNAX

Bastian SOLUTIONS
DYNAX

Stafast
DYNAX

BEACON RAIL LEASING
WORKFLOW APPROVALS

Growers EXPRESS
CUSTOM AX APP

L&M
CUSTOM AX APP

AUSTRALIA

DELIVER-ME
DYNAX

NSW

UNITED KINGDOM

Able Services
WORKFLOW APPROVALS

LIBERTY
DYNAX

Brightstar
WORKFLOW APPROVALS

Thompson CAT
FIELD SERVICES APP

saveco
CUSTOM AX APP

GCC

SWi
DYNAX

igus
WORKFLOW APPROVALS

HONDA
WORKFLOW APPROVALS

savills
TIMESHEETS & WORKFLOW APPROVALS

MEXICO

IDESA
WORKFLOW APPROVALS

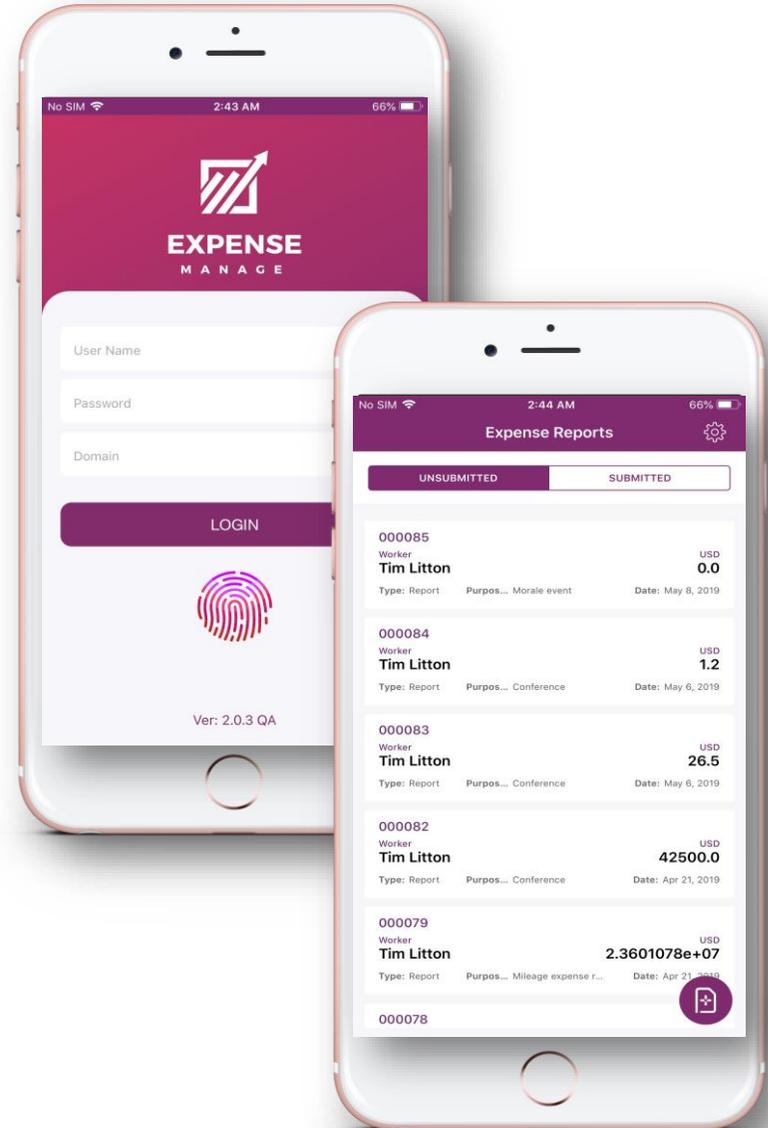**ITALY**

gfl
DYNAX

HyGreen
DYNAX

AX/365 Mobility Suite

- **DynAX App:** The first of its kind, fully featured cross platform customizable mobile solution.

- **Workflow Approvals App:** Fully customizable solution that lets you approve any type of workflow from the AX/D365 CRM.

- The first, fully featured **AX/D365 Timesheet App** for iOS & Android.

- View, create and submit expense reports for approval in our **Expenses App**.

Expenses App

- The first, fully featured AX/D365 Expenses App for iOS & Android.

- View and create expense reports for approval.

- Add attachments to an expense item.

- Super fast setup and configuration.

- Full support of AX Security Framework.

System Overview

F3 Dynamics Mobility Architecture

Supported Versions/Editions

Microsoft Dynamics 365

- Finance and Operations
- Business Central

Microsoft Dynamics AX

- 2012 R1
- 2012 R2
- 2012 R3

Expenses & Timesheets App

- iOS 9+
- Android 5+

Prerequisites

Microsoft Dynamics 365

1. A model package deployment.
2. Application ID, Object ID and Key for the connection.

Middleware

1. Specify AX service URLs for connectivity.
2. Exposing Middleware services to internet over HTTPs/Net.TCP

Microsoft Dynamics AX

1. A small XPO.
2. Creating an AIF Service.
3. Exposing AIF Service to intranet.

Infrastructure Requirements

Middleware

o Windows Server Machine (8GB RAM, 160 GB)
o SQL Server 2012 with IIS and Internet

XPO

o Access to test AX Instance (Webserver & AX Machine must be on the same domain or IIS to be installed on AOS Server)

- Public IP of Middleware Webserver

- Remote Desktop Access to Middleware & AX Client/Server.

- Windows Server 2012 is preferred, 2008 will work too.

Terms

- One-time Setup Charge: $3,000

- Custom Development: $60/hour

- Annual/Multi-year Prepay Discount: Engagement term's pre-payment must be made at the start of the Billing Cycle.

- Support: included in monthly license and provided as per attached SLA.
  Bronze Level Included Complimentary (60 hours yearly)

Business Use Cases – Expense App

Some sample use-cases,

- View and create expense reports

- Modify expense reports to add detail

- Add expenses and receipts to reports

- Submit expense reports for approval

- Add details or photo to an expense item

Microsoft Dynamics – AX Mobility Solutions
Customer Success Stories

A comprehensive solution for improved accessibility and streamline processes

Honda R&D Europe (U.K.) Ltd.

One of the largest manufacturer's of automobiles, aircraft, motorcycles and power equipment with global yearly sales in access of $120 Billion.

Honda wanted a reliable and customized AX Workflow Approval mobile solution that provided approval / rejection capabilities for all workflow types including purchase orders, purchase requisitions and finance.

Products and services	Organization size	Industry	Location	Company Type
Folio3 AX Workflow Approvals App	Large (1001- 5000) employees	Automotive	Swindon, UK	Public Limited

Folio3 delivered a customized AX Workflow Approvals App that was compatible with AX 2012, this allowed existing Honda users to access and manage workflow approval requests from their mobile devices.

Bastian Solutions opts automation for more efficient operations

The company is an independent system integrator dedicated to helping customers increase their productivity through proven automation, information systems and sound operating procedures.

Bastian Solutions needed a mobile solution so that their field-based sales users can access Dynamics AX's Sales & Marketing module.

Products and services	Organization size	Industry	Country	Company Type
Folio3 DynAX App for AX Sales & Marketing	Medium (501 – 1000) employees	Logistics and Supply Chain	Indianapolis, IN USA	Public Company

Folio3 delivered a customized and cross-platforms version of it's DynAX App, the app had built is role based authorization and a number of technical customizations were added on the Customer and Prospect entities.

Enabled the app users to have a more streamlined and enjoyable experience

Savills (UK)

Savills is a global real estate services provider with a network of more than 35,000 people in over 600 offices across the Americas, Europe, Asia Pacific, Africa and the Middle East.

Savills found itself facing various issues with their Timesheet App for iOS, as it had very limited functionality. While the software was lacking basic attributes that Timesheets need, Savills further needed additional features to handle their nature of work.

Products and services	Organization size	Industry	Country	Company Type
Folio3 Timesheet App, Expense Management	Large (10,000+) employees	Real Estate	London, UK	Public Company

Savills Timesheet App Upgrade and Improvements by Folio3 Enables App Users to Have a More Streamlined and Enjoyable Experience, Considerably Boosting Productivity. With the increased streamlining and efficiency provided by Folio3, Savills has been able to improve their Timesheet app considerably. Enabled service lines associated with a particular instruction so that they can be downloaded from central Timesheets to the Timesheets app.
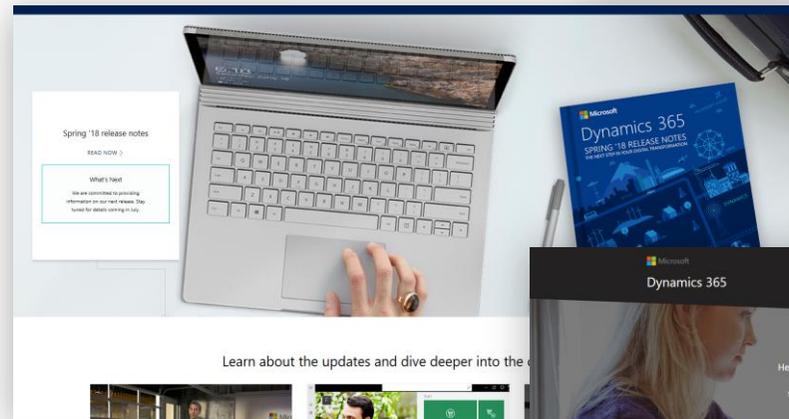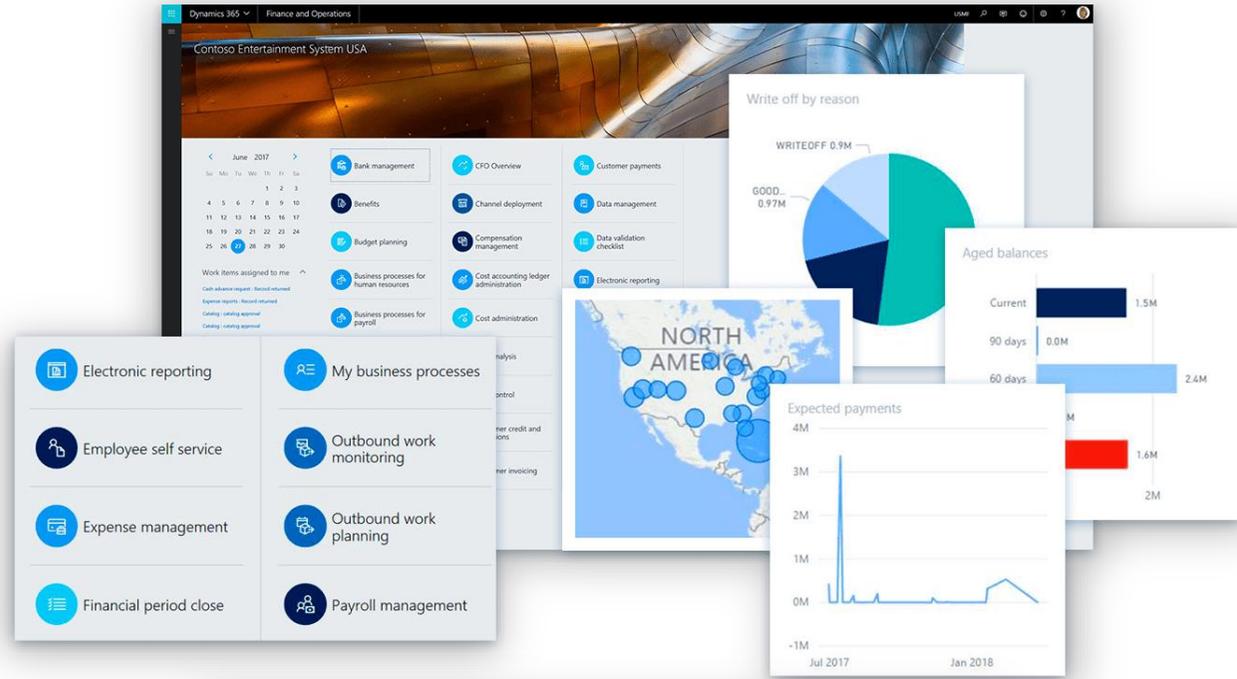
We Are Your Go-To-Experts

- Over 12 years of experience with Microsoft Dynamics

- Featured Microsoft Mobility Partner

- We are a ONE STOP shop for world class expertise in:

  ❖ Dynamics Mobile Apps

  ❖ Dynamics AX/365 Connectors

  ❖ Custom Mobile app development for Dynamics AX/365

  ❖ Cost Efficient AX/365 Implementations

  ❖ AX/365 Development & Customizations

Next steps

- Requirements

- S.O.W

- Sign-off

- Project Initiation

Thank you

Folio3 Dynamics Services

dynamics.folio3.com

dynamics@folio3.com

+1 (408) 365 4638