



Dynamics 365 Customer Engagement

Project Management

Submittals, Transmittals
Meeting Minutes
RFPs, RFIs, & RFQs
Project Change Order
Issue/Task Management
Project Task Management

Document Management

Drawings and Specifications
Version Control
Contracts, Permits, Certificates, etc.
Reports and Testing
Progress Photos
Workflow & Approvals Tracking

Collaboration

Provide secure access to all the project team members. Keep everyone up to date & informed on the project, via email library, alerts, and online access.

Global Features

Global Address Book
Microsoft Outlook Integration
Excel Reporting Alerts
Search Functions
Workflow By Secure Roles



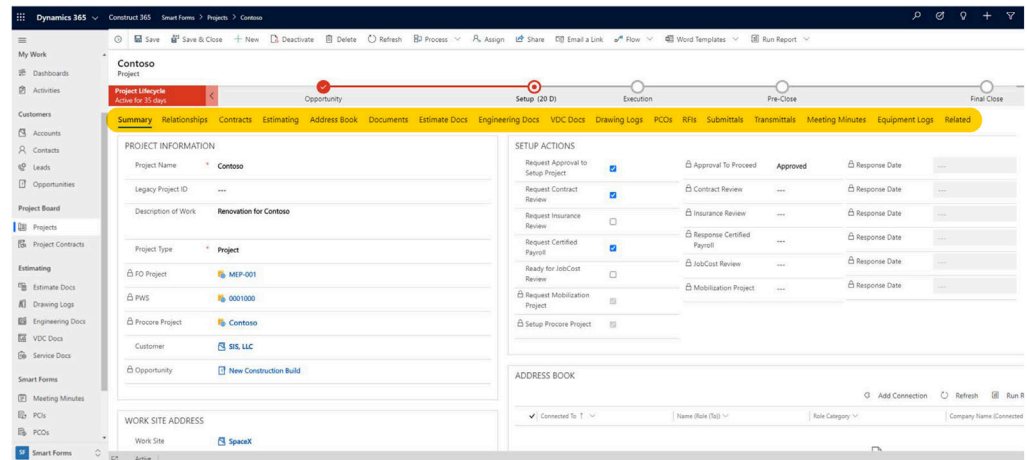
Construct 365 Project Management

Construct 365 Project Management (PM) is a comprehensive Project & Document Management solution built on Microsoft Dynamics 365 and SharePoint technology in the Microsoft Azure Cloud. Construct 365 PM empowers employees with powerful tools to better manage and execute projects using software that works the way they do. Construct 365 PM was created by SIS, a Microsoft Gold Certified partner, and a leader in Microsoft solutions for the construction industry.

As a preconfigured Microsoft Dynamics 365 solution, Construct 365 PM provides construction companies with an intuitive user interface built to manage all of the key aspects of a project. Streamlining project management tasks with easy-to-use SmartForms and automatic updates to log files such as submittals and RFIs. Microsoft SharePoint is used as the backbone for the document repository which brings in a rich tool set for managing documents throughout the life-cycle of a project.

Construct 365 PM offers companies the unmatched flexibility using the power of Microsoft Dynamics which allows personalizing and configuration of the solution to best match your company's unique needs.

SIS (Strategic Industry Solutions) is a Microsoft Partner of the Year Award Recipient that provides, develops, and implements financial and operational software for contracting and professional services focused companies. Our solutions built on Microsoft Dynamics ERP, CRM, and SharePoint foundations provide tools to manage all aspects of the operation, from initial bid, to project close-out. With more than over 25 years of industry experience, SIS has the proven capabilities needed to ensure your success.



POWERFUL WORKFLOWS AND NATIVE MICROSOFT INTEGRATION WITH MICROSOFT OFFICE 365

- The Global Address Book provides a complete database of all business partners integrated into Microsoft Outlook, facilitating all project communications and activities, to be tracked.
- Users can work within the familiar Microsoft Outlook client within the application.
- Reporting is made simple via integration with Microsoft Excel and quick exporting of all log files to an Excel file.
- E-Mail automatically alerts team members of new items, changes and more.
- Powerful search feature works within a single library or across all projects.
- Create powerful user defined workflows based on business rules to automate business processes.
- Assign employees to user roles to control file and information access.
- Access project sites from anywhere in the world with a full cloud solution.

Construct 365 - Project Management



AUTOMATIC CREATION & PROCESSING OF PROJECT MANAGEMENT DOCUMENTS WITH SMARTFORMS

- Streamline submittals with automated submittal workflow and processing. Easily send submittals in Outlook with a one-step process.
- Create transmittal cover sheets for sending submittals and other physical items to business partners.
- Document all meeting aspects according to meeting dates and items discussed. Create project tasks directly from the meeting minutes topic, to ensure activities get tracked and completed.
- Track RFIs in a detailed fashion including all attachments, suggestions, answers, and status.
- Send out complete RFP specifications and details via Microsoft Outlook and track status, responses, and quotations.
- Combine all Project Change Order documentation into one document for submitting and track amounts, dates, and status.
- Capture project issues and assign responsibility and due dates.
- Assign tasks to project team members with complete details, attachments, and more.
- Project team members are alerted with an e-mail when tasks are assigned.
- Reporting and forms output in Microsoft Office or PDFs



INCREASED EMPLOYEE PRODUCTIVITY AND INFORMATION ACCESS ACROSS THE PROJECT TEAM

- Forward all relevant project emails to the project e-mail library. Keep all e-mail messages and attachments in a single location, even if they are deleted from the user's e-mail.
- Version-enable any library for tight version control with document check-in and check-out, along with the ability to add version change comments.
- Host project topic discussions and get real-time feedback from all project team members.
- Complete project document repository accessible from anywhere
- Gain control over drawings with version control and tracking latest approved.
- Organized document storage of all specifications and subsequent changes.
- Scan and store executed owner and subcontract documents with approved signatures, dates, and more.
- Store all permit files tracking the status of the permit, date approved, and notes related to special stipulations.
- Scan and store all related site reports and or tests that have been completed on a project site.
- Complete library of progress photos for viewing, downloading, or e-mailing. Organize by dates, phases, or other relevant grouping.

The screenshot displays the Dynamics 365 user interface. The top navigation bar shows the breadcrumb path: Dynamics 365 > Construct 365 > Smart Forms > Engineering Docs > 2020.05.22-Doc-001. The main content area is titled '2020.05.22-Doc-001 Engineering Doc' and includes a 'File Manager' section. The file manager shows a directory structure with folders like 'Archive', 'Codes', 'Comcheck', 'Design', 'General', 'Mechanical Design', 'Plumbing Design', 'PreCon Efforts', 'Issued', 'Load Calc', 'Photos', and 'Quality Control'. The 'Design' folder is expanded, showing a list of PDF files:

Name
001-56 BUILDING DETAILS.PDF
001-89 BUILDING DETAILS.PDF
002-121 SP-1 SPECIFICATIONS.PDF
002-55 SP-1 SPECIFICATIONS.PDF
003-15 2nd Floor Drawings.PDF
003-15 1st Floor Drawings.PDF
003-15 3rd Floor Drawings.PDF
003-15 4th Floor Drawings.PDF