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AVAILABLE ON
Microsoft AppSource

Expenses Management App

Microsoft Dynamics AX/365

Microsoft | Dynamics 365

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Agenda

- Folio3's Mobility Suite
- Folio3's Expense Management App
- System Overview
- Supported Versions
- Pre-requisites
- App Pricing Structure
- Customer Success Stories

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Folio3's Mobility Suite

Folio3's Native Mobile Apps for Microsoft Dynamics AX/365

Microsoft | Dynamics 365

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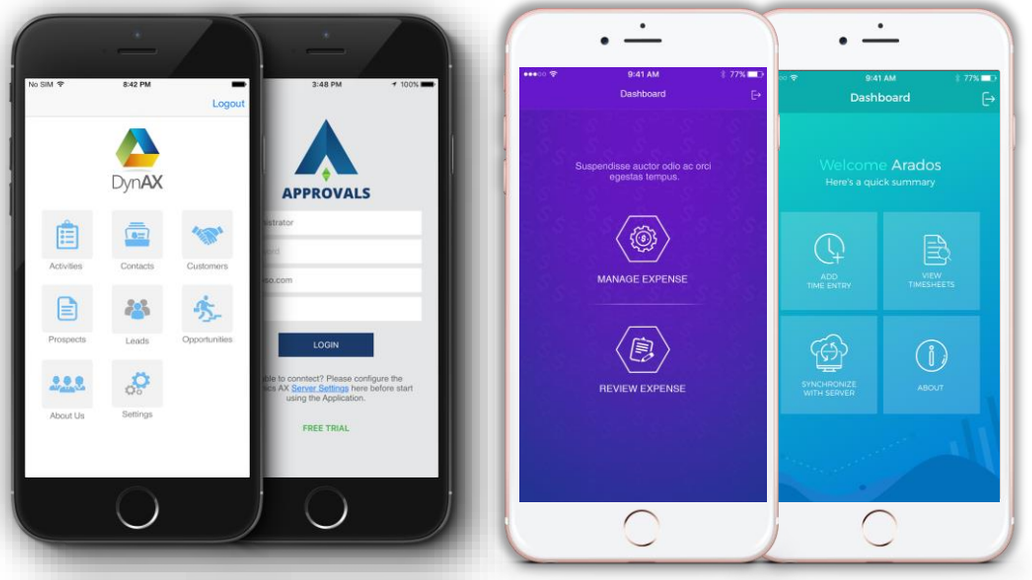
AX/365 Mobility Suite

- **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**.



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Folio3’s Expense App

Expenses App

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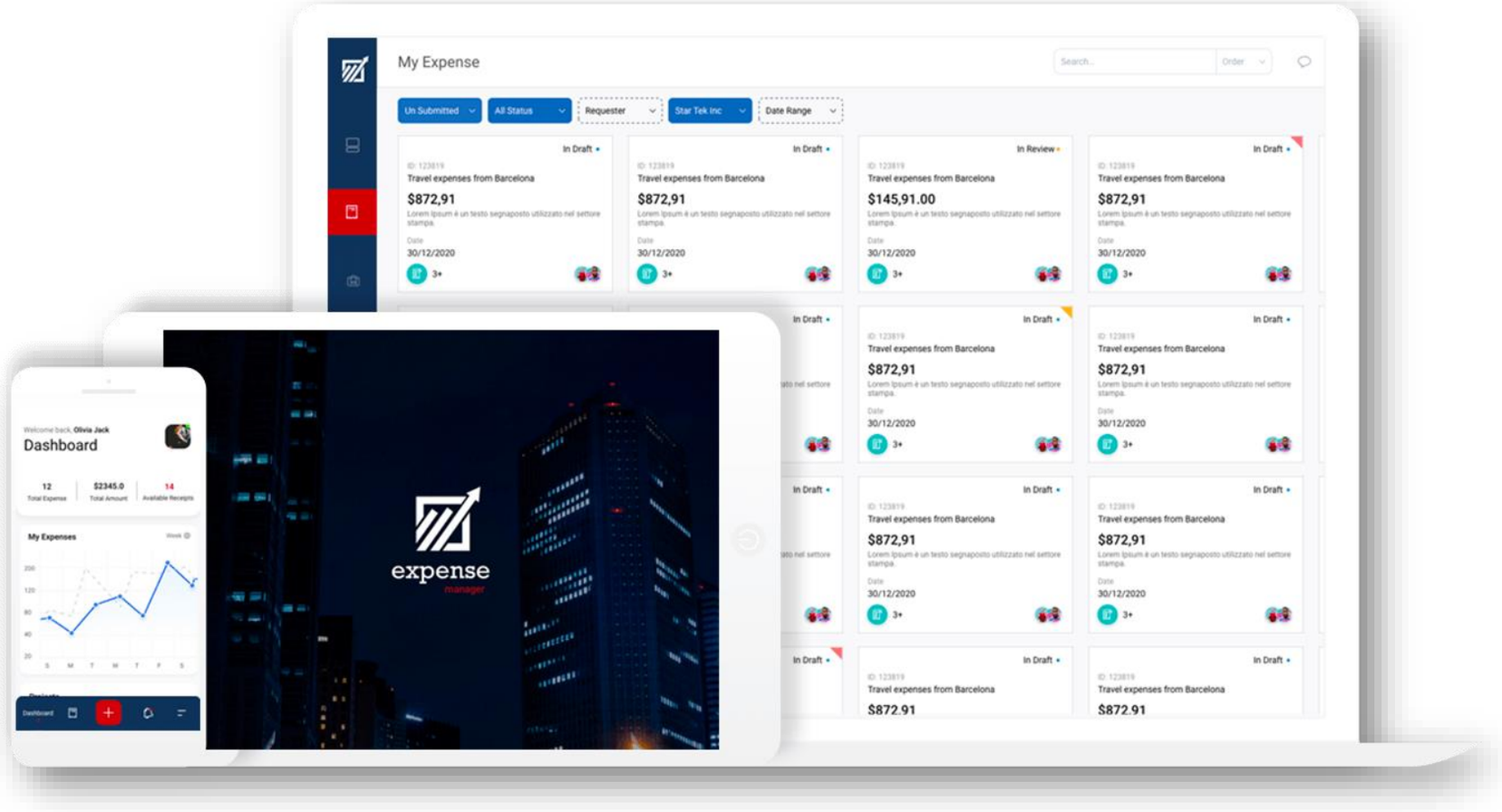
THE FIRST, FULLY FEATURED AX/D365 EXPENSES APP FOR IOS & ANDROID



- View and create expense reports for approval
- Super fast setup and configuration
- Add attachments to an expense item
- Full support of AX Security Framework

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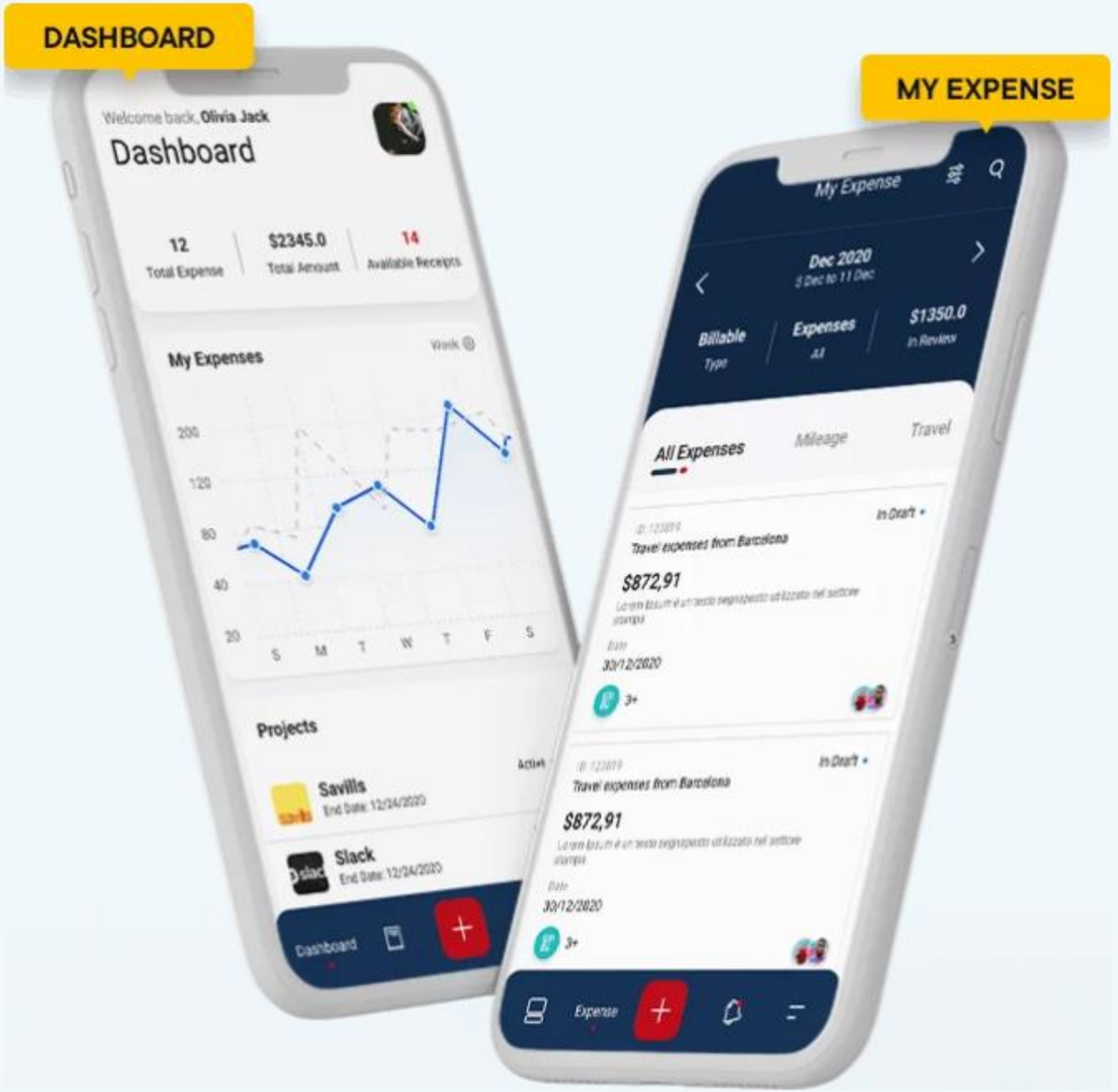
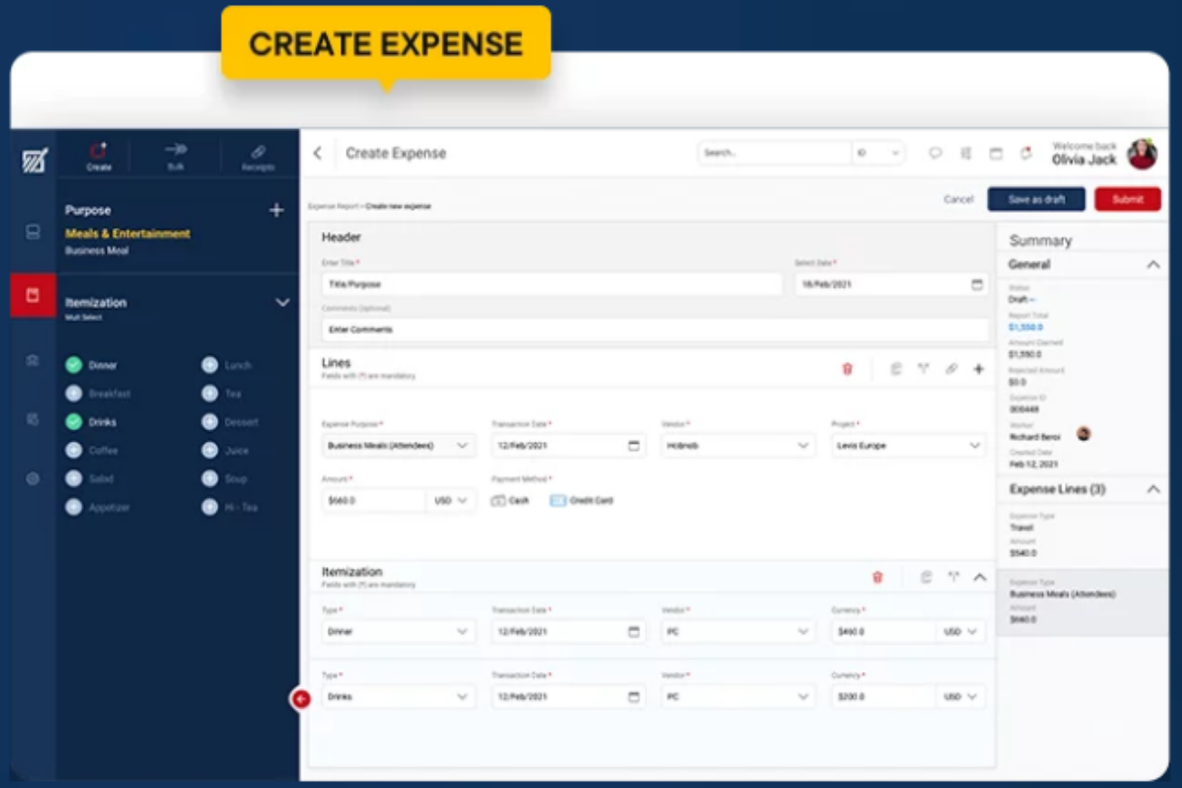
Expense Management App

FEATURES FOR MOBILE

The Folio3 Dynamics 365 & AX Expense Management and Travel Requisition App features are as under:

- Access and manage Dynamics AX Expense Management and Travel Requisition approval requests anytime, anywhere, from the mobile platform.
- Accept or reject individual expense requests with a single tap. View the information pertaining to each request and take appropriate action, along with comments or questions.
- Get instant alerts about pending expense and travel requisition requests and comments or questions from the approver/originator via PUSH notification.
- View and create expense reports and Modify expense reports to add detail.





Expense Management App

FEATURES FOR WEB

The Folio3 Microsoft Dynamics Expense App features are as under:

- Access and manage Dynamics 365 & AX Expense Management and Travel Requisition approval requests anytime, anywhere, from the web platform.
- Accept or reject individual expense requests with a single tap. View the i nformation pertaining to each request and take appropriate action, along with comments or questions.
- Get instant alerts about pending expense and travel requisition requests and comments or questions from the approver/originator via PUSH notification.
- View and create expense reports and Modify expense reports to add detail.
- Add expenses and receipts to reports and submit expense reports for approval.
- Add details or photo to an expense item.
- Approve Expenses pending for you.
- The web platform will provide users with the Ability to create Travel requisitions and also ability to approve Travel requisitions from the Web interface.
- Add details or photo to an expense item.

Our Travel & Expense Management Web App is compatible with Dynamic 365, AX and NAV. The Web App is works flawlessly with all the latest versions of Internet browsers; Google Chrome, Mozilla Firefox, Safari, Microsoft Edge, etc.

WHY CHOOSE OUR

Expense Management App

Renowned & Proven

Our Dynamics 365 Expense App has been tried and tested by many companies across the globe, and has gained a good client base over the course of 10 years.

Fully Customizable

Our Microsoft Dynamics Expenses App is fully customizable; We can provide custom features that are tailor-made for your specific business requirements.

Budget-Friendly Service Provision

There is only a one-time cost for the installation of the app along with customization, and other than that a nominal annual fee for licensing is charged. Once the app is active, users can take advantage of unlimited submissions at no additional cost.

Regular Updates

COne thing our clients appreciate is how we take their feedback into actual consideration and provide regular updates on our app to make the user experience even better.

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

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System Overview

System Overview

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Supported Versions/Editions

Microsoft Dynamics 365

- Finance and Operations
- Business Central

Microsoft Dynamics AX

- 2012 R1
- 2012 R2
- 2012 R3

Expenses App

- iOS 9+
- Android 5+
- Web Version

Available on the App Store

GET IT ON Google Play

Prerequisites

Microsoft Dynamics 365

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

Microsoft Dynamics AX

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

Middleware

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

Infrastructure Requirements

Middleware

- Windows Server Machine (8GB RAM, 160 GB)

XPO

- 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.

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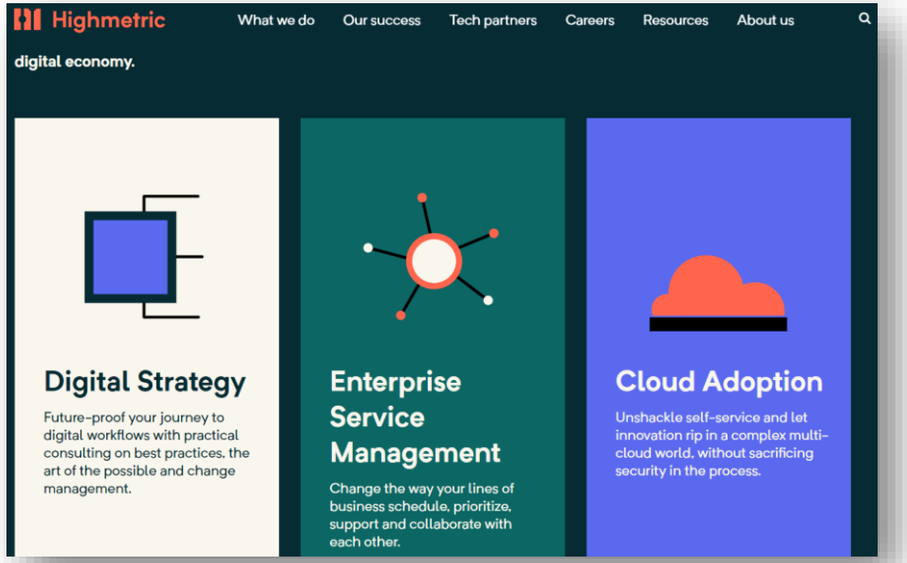
Customer Success Stories

Microsoft | Dynamics 365

Expense Management Automated for Highmetric (formerly Column Technologies)



Highmetric (formerly Column Technologies & Highmetric) is a leading global technology strategy, design and enterprise operations partner to public and private sector clients.

The company has more than twenty years' experience in Enterprise Service Management, Identity Governance, Cloud Operations, DevOps and Managed Services.

We helped Highmetric to automate their Expense and Travel Management operations with Folio3's Mobile and Web Expenses App for Microsoft Dynamics AX 2012 to streamline their Expense Management processes.

Products and services	Organization size	Industry	Location	Company Type
Folio3 Expenses App Folio3 Timesheets App	Large (501 - 1000) employees	Information Technology & Services	Lombard, Illinois USA	Private Limited

Folio3 delivered a customized AX Expense and Travel Management App that was compatible with AX 2012, this allowed existing Highmetric users to access and manage Expense submissions, queries, reports, approvals requests from their mobile devices which was directly connected with their Microsoft Dynamics AX 2012 R3's Expense Module.

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 Suite of Apps	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.

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.

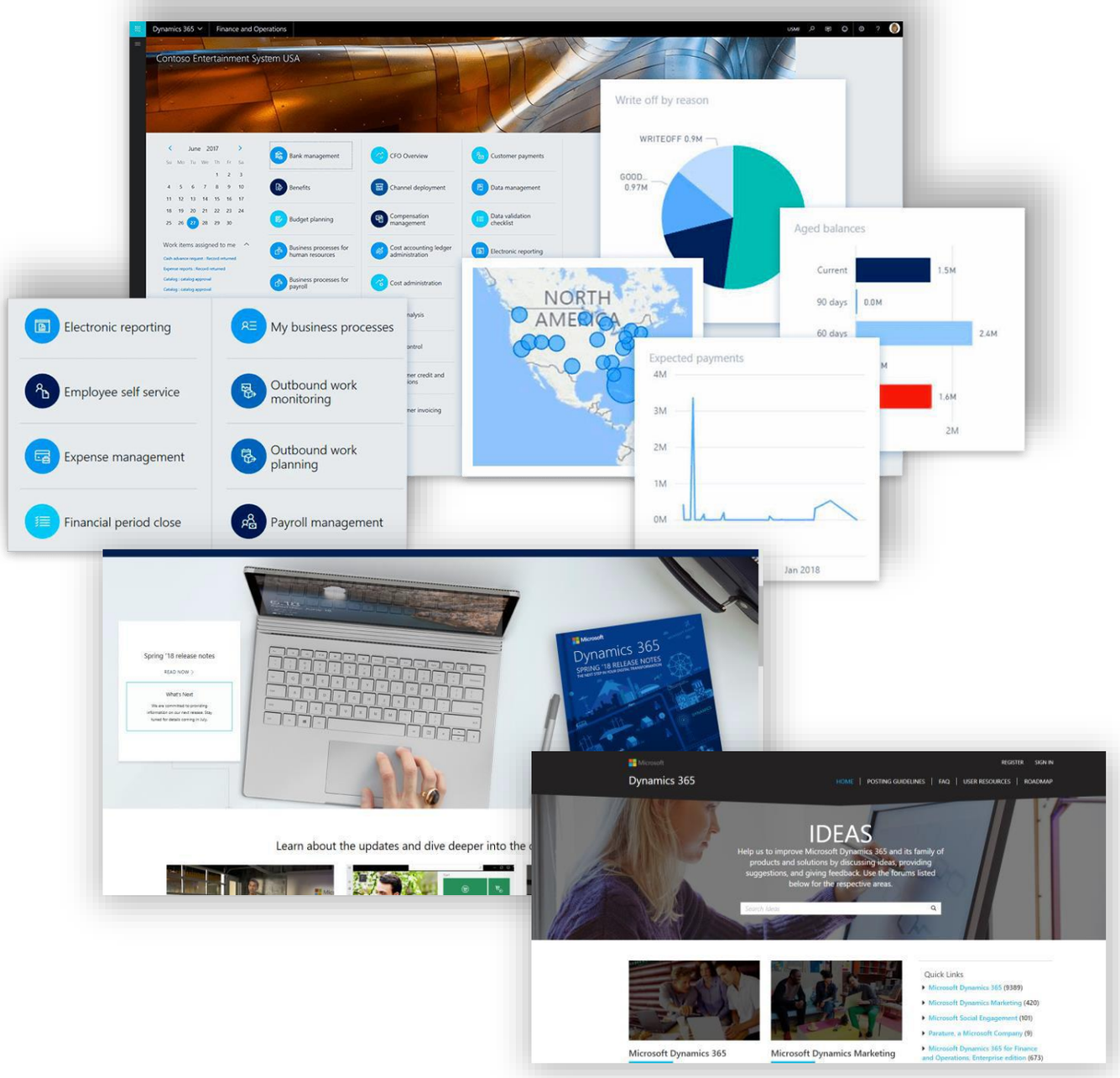
Products and services	Organization size	Industry	Country	Company Type
Folio3 DynAX App for AX Sales & Marketing	Medium (501 – 1000) employees	Logistics and Supply Chain	Indianapolis, IN USA	Public Company

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.

Folio3 Advantages

Next steps

- Requirements
- Live Demo of the App
- Proposal/S.O.W
- Sign-off
- Project Initiation



Thank You.

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