

Utility Management with Microsoft Dynamics 365

Financial Management



Utility Financial Management Software with Microsoft Dynamics 365 Finance providing General Ledger, Accounts Payable, Credit and Collections, Accounts Receivable, Bank Management, Fixed Asset Management and Financial Reporting. Financial Dimensions such as Department, Division, Project to allow for both capture of financial transactions and multi-segment reporting for Utilities. Inter-company transactions and multi-company Financial Consolidation. Out of the box financial reports available at an entity level and consolidated level including:

- Balance Sheet
- Profit and Loss
- Rolling Forecast
- Cash Flow Statement

Ability to drill down from a financial report to individual transactions. Statutory localizations for over 40 countries with Microsoft Dynamics 365 for Utilities.

Unifying the Dots in your Business
Sourcing and Procurement



Manage a Utility and Energy business with Robust Purchasing Software. Vendor Management, Vendor Certification, Run Open, Blind and Closed RFX/ RFP/ RFI sourcing processes. Procurement limits by department to ensure compliance with spending limits. Encumber funds for spending later. Integrate Budget controls in your procurement processes including the Purchase Requisition Transactions, Purchase Orders and Vendor Invoices to ensure your spending is within department budgets.

Purchase Agreements to track spend on an awarded Bid with ability to have multiple Purchase Orders under a single Vendor Agreement. Support for a Vendor Portal for Vendors to electronically communicate with your organization including accepting, amending purchase orders sending shipment notices electronically.

Project Accounting



Utility Project Accounting to manage Capital Expenditure such as new distribution sites or power plants as well as Operational Expenditure such as repairs. Manage Project budgets and spending. Track Multi-Year projects that cross financial years. Award Projects to one or more vendors. Track vendor costs, internal labor hours, materials, and track Project Budget to Costs. Maintain project cost control by summarizing actual cost, committed cost, and remaining budget to accurately forecast total expected cost, and compare with the original budget. Fully Integrated Time sheets that capture labor costs into your Projects for accurate project costing and accounting.



Ability to categorize leases into Operational Leases and Finance Leases with Microsoft Dynamics 365 Finance ERP and ensure compliance with FASB Leases (ASC 842), ASC 840, IFRS 16 and IAS 17. Setup Thresholds for Short Term Leases and Low Value Leases (P&L impact only). Automate lease calculation of a lease's present value/ fair value, and its subsequent processes such as future lease payments, amortization of lease liability. Support for financial leases, right-of-use assets, their depreciation, and expense schedules. Integration with General Ledger, Accounts Payable, Purchasing and Fixed Asset modules.

Employee Self-Service



Employee Portal Software tailored for Utility Staff to view and update personnel information, contact information, emergency contacts. Ability for team members to view accrued leave balance by absence leave type, submit leave requests, and enter expense reports and timesheets. Managers can view team members information, view and approve leave requests and expense reports. Telecom staff members have the ability to view available training courses and enroll in them.



Budgeting and Financial Planning Software for Utilities provides Long Term Forecasting, Financial Projections, Annual Budgeting and Track Budget to Actuals. Forecast Personnel Positions, Salary Increments as well as Operating Expenditure Budgets. Plan for Capital Expenditure with detailed cost estimates for vendors costs, equipment, labor, material and track CapEx Budget to Actuals once approved. Forecast Long-term Expenditures and enable Capital Planning.

Human Resources



HR Software to automate Utility processes with from hire to retire including Recruiting, Applicant tracking, Personnel and Employee Record Management, I-9 Compliance, Leave and Absence management Compensation management, Performance Management, Time and Attendance, and Benefits Tracking. Leave Accrual Rules by Leave Type e.g., Annual PTO, Bereavement Leave and support for both Paid and Unpaid Leave. Online application of absence with ability for managers to review and approve or reject leaves.



Use Microsoft Dynamics 365 for Field Service for Utilities to schedule inspections, repairs, preventive maintenance for engineering staff, equipment and vehicles for new assets, and maintenance work orders. Scheduling of Equipment, Resources and Team members based on Skills, availability, and geography. Empower dispatch and customer care teams with live map views and field service metrics. Give your customers the real-time insight they have come to expect.

Customer Service



Improve Customer Satisfaction and reduce subscriber churn by using our Unified Agent Desktop and Customer Service Solution for Utilities built on Microsoft Dynamics 365 Customer Service.



Automated Employee Expense Management software for Utilities including Pre-Travel Authorizations, Expense Report submission via an Employee Portal, Expense Policies that can automatically reject an entry, Multi-level approval hierarchy using a workflow designer, Expense Approvals. Browser-based with app support for mobile devices. Cloud-based running on Microsoft Dynamics 365 Finance.



Unifying the Dots in your Business

About Unify Dots

Unify Dots helps you connect the Dots by providing business solutions that enable digital transformation. Unify Dots specializes in CRM, Customer Service, Customer Insights, Ecommerce, ERP, Order Management, Field Service, Inventory, Procurement, Project Operations, Marketing Automation, Sales Automation, Supply Chain, Point of Sale, and Warehouse Management solutions.



Unify Dots operates in Asia Pacific, Australia, New Zealand, Europe, North America and across the globe with a local touch. Unify Dots is also committed to improving the world and has pledged donating at least 25% of its profit towards the cause of helping educate children from low-income families in developing countries.

Contact Unify Dots

Email us at info@unifydots.com to get more information on implementing the Unify Dots' Utility Management solution or contact us by calling one of our office locations or visit us at <https://unifydots.com>

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