
Minnesota Emerging Software Advisory PITCH

DefineTheBox.com

Turn complex scope into Living Documents.

Microsoft-native workflows connecting customer requirements, commercial scope, delivery, risk, quality, and living documentation.

SCOPE → QUOTE → QUALITY → LIVING DOCUMENTS



Equipment, Assets and Processes in Manufacturing are Customers that outlast the teams that design them

01

Institutional Knowledge

Scope, Design Requirements, Risks Ledgers, Failure Mode Effect Analysis (FMEA) to Corrective and Preventative Actions (CAPA) are separate documents

Cargill: “If we only knew what we had learned before”

02

Asset Lifecycles

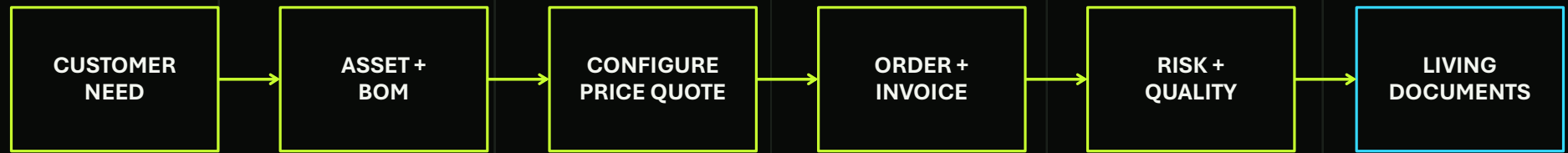
Customer User Requirements, asset names, part number, serial number, risks, preventative maintenance, calibrations, purchase orders, pricing, and documentation are in disconnected files and systems.

03

HANDOFFS BREAK

Sales, engineering, operations, and quality management systems (QMS) inherit different versions of the same customer story.

DefineTheBox a Customer Relationship Management (CRM) system for Equipment and Processes to living documentation.



One data model

links what the users require, what was sold, what was built, what can fail, and what must stay current.

Dynamics 365 + Dataverse foundation • Marketplace-listed SaaS

Product scope includes CPQ, ERP-lite transactions, asset tracking, FMEA/CAPA/QMS workflows, and document generation.

WHY NOW

U.S. SPENDS ~60B INDUSTRIAL AUTOMATION MARKET PER YEAR

**10% per year
growth rate**

**Industrial Automation is scaling faster
than the workforce that will design and
service it**

DefineTheBox connects customer requirements, risks, quality, and asset history

LONG LIVED ASSETS

Equipment outlasts the teams that design them

FRAGMENTED KNOWLEDGE IS SCALING FAST

Deployed in a Dynamics 365 environment; designed around Dataverse workflows.

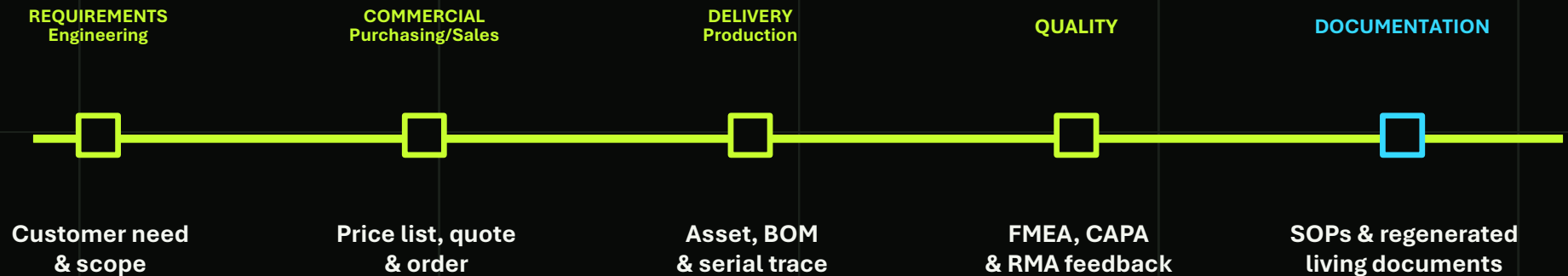
CUSTOMER-CONTROLLED DATA

Publisher states app data is stored in the customer's Microsoft Azure account.

**Keep Documents Updated from a Single Source of
Truth for User Requirements informed by Risks**

Sources: <https://www.mordorintelligence.com/industry-reports/united-states-factory-automation-and-industrial-controls-market-industry>
<https://addverb.com/us/blog/brownfield-automation-us-warehouse-retrofit/>

DefineTheBox a Customer Relationship Management that considers Manufacturing Equipment as a Customer



CHANGE ONCE → propagate the customer story across connected operational records and documents.

Competitive context: broader CPQ and QMS platforms exist; DefineTheBox's partner story is its connected, Microsoft-native scope-to-quality thread.

Three partner types can turn the platform into a repeatable offer.

01 MICROSOFT PARTNERS

BRING
Dynamics, Power Platform, data, security, and change expertise.

UNLOCK
A vertical workflow accelerator instead of another open-ended custom build.

02 INDUSTRIAL INTEGRATORS

BRING
Customer access, engineering context, parts, controls, and field delivery.

UNLOCK
A digital thread from scoped system to BOM, quote, risk, service, and RMA.

03 QUALITY ADVISORS

BRING
FMEA, CAPA, SOP, validation, and regulated-process expertise.

UNLOCK
Connected evidence and living documentation tied to operational records.

Shared promise: sell the customer a maintained operating thread—not a one-time software handoff.

Version 1 Published in the Microsoft App Store Update 45 under Microsoft Review for Publication

**\$880K / YR Quoted
By One User**

Founder Used DefineTheBox to
Quote 880k of parts for a
regional Distributor

**723 Assets Tracked
By One User**

From Integrators, Medical,
Foundry, Semiconductor, and
CPG Manufactures

**63 Serial Numbers
46 Calibrations
240 Products**

Details of Assets when and
where they matter

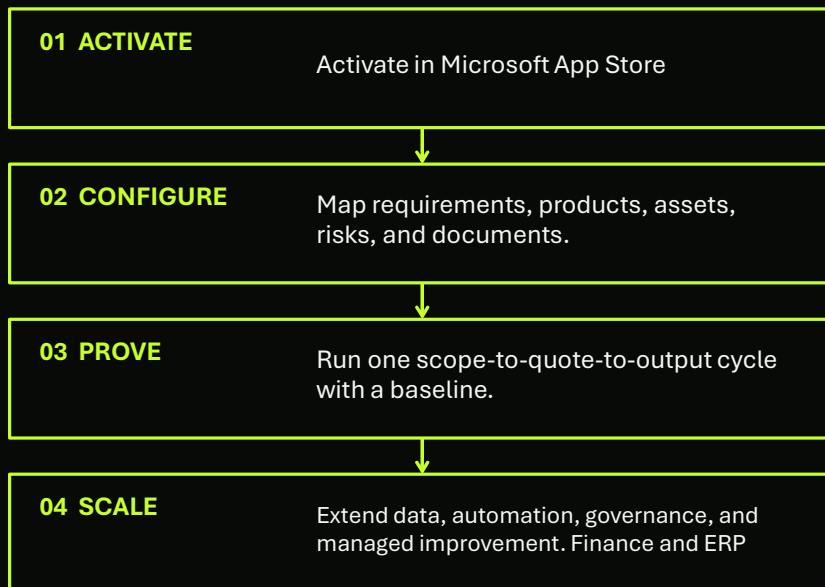
**Key Performance Indicators that use to be in siloed documents like Quotes in a SharePoint or
network drive, assets in spreadsheets,**

Pilot implication: validate the same outcomes with jointly agreed baselines, owner, and measurement period.

Source: Founder Used Features

Cosell with Microsoft Dynamics 365; expand through services and integrations; expand to other Platforms

60-DAY ACTIVATION



PARTNER REVENUE LAYERS

DISCOVERY + DESIGN

Requirements, risk, process, and solution architecture

DEPLOYMENT

Environment, data model, workflows, templates, and training

INTEGRATION + CUSTOMIZATION

Connectors, automation, reporting, and vertical IP

MANAGED IMPROVEMENT

Support, governance, optimization, and document evolution

Let's turn one customer story into a repeatable offer.

01

NOMINATE

one customer with complex scope, quoting, asset, or quality workflows

02

ALIGN

on a baseline, success measure, owner, and 30-day pilot boundary

03

PACKAGE

the repeatable offer, partner responsibilities, and expansion path

DefineTheBox.com

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