How Synergy Achieved **15% Better Cash Flow Visibility** Using RDash

R⚡DASH

About Synergy

Synergy Promoters Pvt. Ltd., a sister concern of Om Infra Ltd., is a leading player in the infrastructure domain with a specialization in electrical transmission projects. The company undertakes large-scale infrastructure work, including transmission line erection, substation development, and related civil and electrical engineering services for both public and private sector clients. Synergy manages end-to-end delivery of high-impact infrastructure projects across India.

Location	Revenue	Industry
Delhi	**500cr**	**EPC**

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Tracking Progress Became a Challenge as Project Scale and Timelines Grew

The infrastructure industry covers large-scale, long-term projects like highways, bridges, dams, power plants, and transmission lines. Projects often involve numerous stakeholders, including government agencies, contractors, and vendors, all of whom need to be aligned to ensure successful execution. Transmission line projects typically stretch over several years, covering vast distances and multiple sites. These projects come with their own set of hurdles, with government clearances often taking time as permit rules vary from state to state. Labour is often hard to find in remote areas, and timely material delivery is another constant challenge. Beyond these, coordination becomes an ongoing challenge as teams on the ground, vendors, and various departments involved in different phases of the project need to stay in sync. With such large-scale projects, missing a simple update can cause significant delays. Keeping track of the status across multiple sites, ensuring timely delivery of materials, and aligning teams on task execution becomes more complex.

Synergy is currently executing a large-scale 183 KM transmission line project for Adani in Jamnagar, which involves the erection of over 514 transmission towers and the stringing of 183 KM of transmission cables. The total project budget is ₹100 crore, with expected completion by October 2026.

While the team could track overall progress and expenses at a broad level, when it came to monitoring work at each of the sites, things got tricky. Tracking individual transmission tower progress wasn't easy, and with so much paperwork involved, it became overwhelming to manage documentation and stay updated across all locations.

For Synergy, another main challenge was managing cash flow. Without a clear way to track how much work was actually completed at each site, it became difficult to know what payments were due in or out. And with projects running over long timelines, smooth cash flow was essential to keep everything on track. Subcontractors often pushed for payments, but without accurate site-level data, the finance team had no clear visibility into which payments were actually due and to whom. Pending payments created bottlenecks - slowing down execution and putting pressure on vendor relationships. Synergy tried multiple software tools before choosing RDash, but none of them offered the individual tower-level tracking they needed.

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> We could see the overall project moving, but understanding what was really happening at each site was a challenge. Things that might have just gotten away from us in the past, which weren't really part of everyday workings, are now visible, accountable, and everyone can see it.
>
> — **Vipin Tomar** (Finance Head)

Key Challenges

Progress Tracking

Synergy is working on the erection of over 500 transmission towers, which makes it challenging to track day-to-day progress accurately. While they could track overall progress, staying updated on what was happening at each site wasn't easy, leading to gaps in visibility for project managers and stakeholders.

Material Management

Managing materials across multiple tower sites was another major pain point. Requirements often varied from site to site, and Synergy's teams relied on Excel to track how much material was received, what had been consumed, and how much stock was left on-site. This made planning and procurement less efficient.

Cashflow Management

Before RDash, they had no centralized system which is linked to work progress and had less visibility into the updates. Also, when it came to checking expenses tower by tower, it became a hurdle. Payments were often approved based on rough assumptions- not on the basis of work progress. And without clear data on how much work was actually done, figuring out what to invoice was always a guessing game.

Financial Reconciliation

Given the scale of Synergy's projects, continuous POs and invoices were generated, and modifications to POs were common. However, there was no clear record of changes, no structured approval hierarchy, and little visibility into payment statuses. This often caused confusion and made it difficult to track and settle payments accurately.

Document Management & Coordination

Synergy's project and finance teams frequently faced coordination issues due to scattered, manual document management. The finance team lacked clarity on actual spending, while site teams had to manually search through files to find POs or expense records. Because infrastructure projects run for extended periods, maintaining and retrieving documents when needed became increasingly difficult, further impacting transparency and efficiency.

Implementation

Process Streamling

For Synergy, keeping track of so many moving parts across multiple sites was a constant challenge. RDash gave the team a centralized platform to manage day-to-day work across functions. With live updates and centralized access, teams could collaborate better, share updates instantly, and avoid confusion across departments -keeping projects on track without the usual back-and-forth.

Enabling Financial Visibility Through Dashboards

RDash's custom dashboards gave Synergy's finance team a much clearer picture of where the money was going. Instead of juggling sheets, they could now track project costs, view order statuses, and get ahead of any budget overruns. With all financial data in one place, decisions became faster and more informed.

Setting Up a Clear Approval Workflow

Before RDash, Synergy didn't have a clear maker-checker system for handling POs, payments, or invoices. Approvals were scattered, often leading to delays and confusion. RDash implemented an approval hierarchy for every type of financial transaction - whether it was payments to vendors, subcontractors, labor, or even reimbursements for site staff. Now, approval requests are sent via WhatsApp and automatically logged into the platform.

Training and Rollout

To ensure a smooth transition to RDash, the team underwent hands-on training tailored to their specific roles. From on-site engineers to finance managers, everyone was trained thoroughly. This helped drive faster adoption and minimized disruption during rollout.

## Real-Time Performance Tracking and Analytics

With RDash's analytics features, Synergy could track progress at a much more detailed level. Whether it was site updates or pending tasks, the team now has real-time data to work with. This helped spot bottlenecks early, shift resources as needed, and keep execution aligned across sites.

Establishing Feedback Loops

Our TAM team conducted regular review meetings to gather feedback. The Synergy team shared what was working, what wasn't, and where they needed more flexibility. We worked closely with them to tweak workflows and ensure they were getting the most out of the platform.

Results

5%
Less Site
Expenses

8%
Less
material wastage

15%
boost in
cash flow
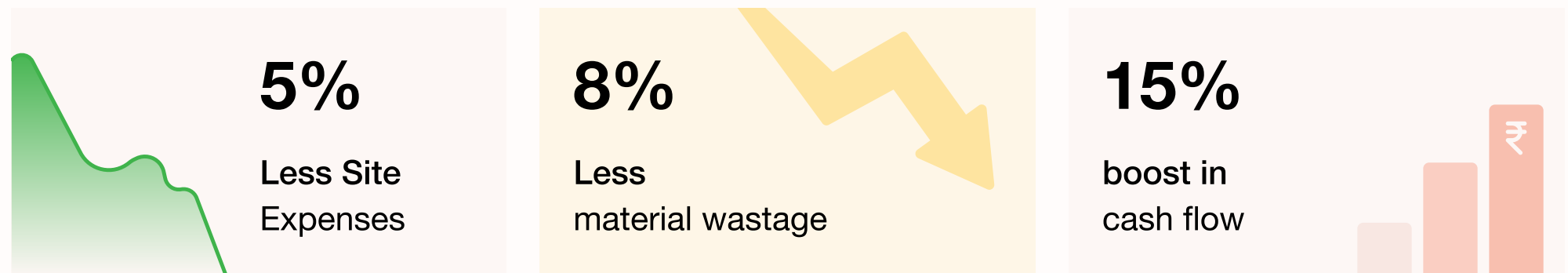
By setting up a multi-layer approval flow through the Order & Expense module, the team finally had visibility into site-level spending. With every PO and expense going through the right checks, they saw a 4–5% reduction in unnecessary costs.

With all material data now on one centralized platform, the team always knows what's been received, who logged it, and how much has been consumed. Having a digital record helped reduce material wastage by up to 8%, improving both cost control and site efficiency.

The custom dashboard gave the team a clear view of how much they had earned based on real-time progress. No more guesswork, pending payments were automatically flagged, helping them stay ahead on collections. This clarity led to a 15% boost in net cash flow.

> Doesn't matter whether you're on-site or off-site, now it takes just one click to check project updates or access what you need. Everything's finally in one place.
>
> — **Devansh Kothari** (Director)

Favourite Tools/Features

Order & Expense

The Order & Expense module has been a major unlock for Synergy. With every PO and site-level expense flowing through a structured approval process, the team now has full visibility into spending. What was once scattered across Excel and emails is now tracked in one place - bringing better control, accountability, and smoother coordination between project and finance teams.

Material

Material tracking used to be one of the most time-consuming parts of the job. This module changed that completely. The team can now see exactly what material has been received, who logged it, and how much was consumed - all in real time. It's helped avoid overstocking, reduced wastage, and brought more predictability to planning across sites.

Approval Hierarchy

The lack of a formal approval process used to cause delays and confusion at Synergy. With the Approval Hierarchy module, a structured approval workflow was implemented that ensured purchase orders were only raised after proper authorization. This not only sped up procurement but also created a digital audit trail, making it easy to monitor order approvals and maintain compliance with company policies.

R DASH

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