



PRODUCT GUIDE

NAXT - Microsoft Dynamics AX for Equipment Dealers

XAPT

A Single Source of Truth for Equipment Dealers

Equipment dealers often require a number of disparate systems across multiple locations to run their operations with each system storing copies of the same information. This increases the chances of out-of-date or inaccurate information being used for decision making. NAXT - Microsoft Dynamics AX for Equipment Dealers is a fully integrated solution, using a single database, and providing a unified source of all information - a single source of truth.

We work with equipment dealers to deploy our solution in a way that suits your business; on-premise, in the "cloud" or as a hybrid model, we provide the reassurance of a truly integrated Microsoft solution underpinned by a promise of continuous research, development and innovation - offering peace of mind and a sustainable solution for your business.

Product Guide

Welcome to our Product Guide for NAXT – Microsoft Dynamics AX for Equipment Dealers.

We pride ourselves on delivering great solutions tailored for the Equipment Industry; that means our solution is already highly configured for the needs of equipment dealers. Our dealers tell us that it is this knowledge, expertise and industry insight that makes their implementations so successful; because it works the way they do.

NAXT – Microsoft Dynamics AX for Equipment Dealers is a leading-edge technology and business platform that is unmatched in the equipment distribution industry. Offering an outstanding combination of functionality, flexibility, integration, affordability and scalability, NAXT delivers a low Total Cost of Ownership (TCO) and fast Return on Investment (ROI).

What it does

NAXT – Microsoft Dynamics AX for Equipment Dealers replaces all your existing disparate business applications to drive real-time collaboration across your dealership in one, single solution. By rationalising back office processes and automating administrative tasks, equipment dealers can spend time focusing on high-value activities that drive revenue and increase profitability to fully satisfy and exceed critical metrics in a cohesive, single streamlined environment.

One solution for all your dealership needs

We work closely with Microsoft and equipment dealerships to ensure our functionality meets their needs. Our solution is the only integrated software you need to run your business, based on fully integrated Microsoft Technologies that optimize productivity through integration with all other Microsoft applications.

A single source of truth

With so many disparate systems, the chances of information used for analysis and decision making being incorrect or decayed are heightened significantly. NAXT – Microsoft Dynamics AX for Equipment Dealers provides true end-to-end integration and a single source of truth.

Low total cost of ownership

NAXT – Microsoft Dynamics AX for Equipment Dealers increases the value of information by providing integrated access to the “whole of business” data contained within a single database. Simple to learn and use, our solution provides the agility equipment dealerships need to expand business operations, modify and streamline processes and achieve competitive advantage. NAXT optimizes existing investments; lowering the Total Cost of Ownership (TCO), and driving tangible results.

Proven and recommended

With many existing customers and more organisations in the process of implementations globally, our clients say our configured solution and team of experts address their current and future needs for integration and improve efficiency at their dealership.

Our investment in your future

Our approach is based on a business partnership. We are committed to the Equipment Industry and look forward to being your trusted business partner for years to come. XAPT invests tens of thousands of hours annually adding new cutting edge technology and upgrading the system in synchronization with Microsoft.

Equipment Management

EQUIPMENT ROLES: Dealer Principal, CEO, COO, CFO, Vice President of Sales, Vice President of Rental, Vice President of Product Support, General Sales Managers, Product Support Managers, Rental Managers, Service Managers, Parts Managers, All Sales Representatives, Equipment Managers, Equipment Inventory Control Managers, Accountants, Internal Auditors, Sales Support Managers

Instantly improve the capabilities of equipment management within your dealership, seamlessly and effortlessly provide clear visibility of all equipment.

- Know what is on order and when it is due at your facility
- Accurately review your cost basis in any piece of equipment, work tool or attachment
- Deploy XAPT Single Source of the Truth – the financial and operational information is 100% accurate and current. You will no longer need to rely on interpreting disparate data to arrive at a conclusion
- Significantly reduce inventory carry costs by having equipment available at the proper location at the right time with the correct configuration

Fleets Tracked	<ul style="list-style-type: none"> • New Equipment • Rental Fleet • Pending Trades • Used Equipment • Competitive
Equipment KPI	<ul style="list-style-type: none"> • Leverage the power of information available via 21 industry specific data cubes including, but not limited to: <ul style="list-style-type: none"> • Equipment Financial Transactions • Sales Invoices • Rental Utilization • Warranty • Service • Parts • Power Systems
Cost and Revenue	<ul style="list-style-type: none"> • All equipment costs including, but not limited to: <ul style="list-style-type: none"> • Acquisition Cost • Capital additions • Capital reductions • Depreciation earned • Rental revenue • Warranty expense, reimbursement and net cost • Expensed repairs

Equipment Management *continued*

Cost and Revenue <i>continued</i>	<ul style="list-style-type: none">• All equipment revenue including, but not limited to:<ul style="list-style-type: none">• First in dirt (FID) revenue• Gross rental revenue• Warranty (base and extended)• Service Contract• Product Support• Interest income• Drill down to the transaction level to review each and every step in financial history
Lifecycle	<ul style="list-style-type: none">• Multiple equipment lives allow insight into equipment cost and revenue during different stages of lifecycle, such as:<ul style="list-style-type: none">• Rental Fleet• First Retail Sale• Trade in to Used Equipment Fleet• Second Retail Sale
Visibility	<ul style="list-style-type: none">• View equipment, work tool and attachment inventory by Make and Model, region, branch, location, etc.• View all branch locations at a glance, at a summary level with detailed drill down capability to see attachments (work tools), hours, etc. on specific units.• View by type (i.e.: hydraulic excavator, crawler dozer, wheel loader, hydraulic hammer, rock bucket, etc.)

Rental Management

ROLES: Dealer Principal, CFO, Vice President of Rental, Rental Managers, Rental Counter People, Rental Sales Representatives, Internal Auditors, Accountants

Enables dealerships to become much more efficient: seamlessly transfer equipment, calculate rental conversations, manage contracts, track equipment and work tool utilization.

- Easily transfer equipment from new inventory to the rental fleet with seamless financial transactions. All transfers are governed by security, so only those who have authority may approve fleet transfers.
- Quickly calculate cash customer prepaid rental amounts and deposits due with our advanced best rate calculator
- Calculate rental conversion or rental purchase option contracts at any point in time
- Gain immediate insight into prime product, work tools and attachment utilization
- Multiple depreciation methods are supported such as revenue based, straight line, MACRS
- Invoicing in advance and/or arrears

Utilization	<ul style="list-style-type: none"> • Easily obtain utilization (physical, time and financial) at the fleet, division, branch, make, type, model, and serial number level. This includes obtaining utilization for work tools and attachments
Pricing Engine	<ul style="list-style-type: none"> • Advanced pricing engine supports multiple rental rates (e.g. standard duty, multiple shifts, continuous duty, demolition, harsh environment etc.) • Set pricing based on jobsite • Easily set pricing by model class • Control discounting by setting pricing parameters for rental coordinators
Equipment Tracking	<ul style="list-style-type: none"> • Communicates with leading telematics • Depending on the transmitter, automatically obtain hour meter, location, fuel level, error codes, and geofencing • Supports automatic overtime billing for long term contracts
Attachment Handling	<ul style="list-style-type: none"> • Financially affix an attachment or work tool to a carrier • Easily track service history and utilization of attachments
Insurance Management	<ul style="list-style-type: none"> • Verify the presence of proper coverage; provides the ability to sell LDW as an optional item on a contract
Scheduling	<ul style="list-style-type: none"> • Fully integrated equipment movement tracking instantly creates shipping or receiving documents • Using barcoding, ship and receive equipment in the yard with a handheld device or smart phone • Issue a purchase order to the trucker as required that is tied to the movement record • Easily view available equipment, equipment pending service, or returned • Allows quick and easy scheduling of future requirements

Rental Management *continued*

Lien Reporting	<ul style="list-style-type: none">• In areas where a notice to owner is required, automatically generate and transmit requisite notices to the correct party
Incidental Charges	<ul style="list-style-type: none">• Easily add fuel charges, transport charges and environmental fees as either a fixed amount of a percentage of overall revenue• Recapture the cost of damage repairs by billing from within the contract
Customer Portal	Allow customers to: <ul style="list-style-type: none">• View equipment on rent• View rental equipment availability• Review equipment assigned to a specific jobsite• View historical rental information• View rental invoicing• Begin a new rental request
Smart Phone	<ul style="list-style-type: none">• View equipment on rent• Ship and receive equipment from the yard• View customer rental rates• View current list of equipment assigned on rent

Service Management

ROLES: Dealer Principal, CFO, Vice President Product Support, Vice President Service, General Service Manager, Regional Service Manager, District Service Manager, Branch Service Manager, Service Advisor, Service Writer, Warranty Manager, Warranty Administrator, Warranty Clerk, Technician, Product Support Sales Manager, Product Support Sales Representative, Controller, Internal Auditor, Accountant

Service Management - enables dealerships to better plan, track, and analyze service operations.

- Maximize labor efficiency
- Increase Service Market Share
- Increase Customer Satisfaction
- Gain a complete understanding of costs and revenue
- Improve service profitability

<p>Service (work order)</p>	<ul style="list-style-type: none"> • Create segment level quotations; each version is saved in history for reference • Set up orders manually or automatically at periodic intervals • Record service time, expenses, parts and outside labor and materials • Supports multiple serial numbers and customers on a work order • Split work order segments between customers by specific amounts or percentage total • Independently close a single segment, multiple segments, or the entire work order and present the invoice in the order that makes the most sense • Setup each segment independently, or the entire work order to flat rate all, partial flat rate (labor, parts, miscellaneous) or, time and materials • Rapidly create service orders over the Internet with Enterprise Portal in Microsoft Dynamics AX
<p>Service Agreements</p>	<ul style="list-style-type: none"> • Tailor agreements to customer requirements, service prices, and payment arrangements • Unlimited combination of equipment and service scenarios on a single contract • Full component and downtime tracking • Track true profit and loss at both the equipment and contract levels • Easily add or delete equipment from within a contract • Automatically schedule service visits utilizing calendar or telematics interfaces • Create and process service subscriptions for fixed-price service over a period of time • Accommodate revenue based on fixed or irregular periods and multiple price arrangements
<p>Skill Tracking</p>	<ul style="list-style-type: none"> • Manage employee skill sets • Allocate technical assignments based on skill level and certification • Track employee certification renewals
<p>Technician Time Management</p>	<ul style="list-style-type: none"> • Manage technician's time as they "clock in" to a segment in real time, or batch enter labor at the end of the day • Quickly and easily view and approve time to final post to work order segment

Service Management *continued*

Standard Job Management	<ul style="list-style-type: none"> • Easily import and amend standard jobs from supported OEMs • Create from an existing segment or • Create and edit as needed from other media
Service Calls and Dispatching	<ul style="list-style-type: none"> • Create service tasks and appointments within the Microsoft Outlook messaging and collaboration client • Gain full visibility through graphic field and shop floor scheduling screens <ul style="list-style-type: none"> • Visually track telematics enabled equipment and your service fleet when GPS enabled. Quickly see which technician is closest and able to complete the repair
Repair Management	<ul style="list-style-type: none"> • Register repair tasks • Undertake diagnosis tracking and record resolution • Identify faulty products
Warranty Management	<ul style="list-style-type: none"> • Enhanced warranty claim submission and reconciliation • Create a warranty claim on a work order segment and if supported by OEM, automatically transmit claim, receive claim acknowledgement, and settlement • Set parameters to automatically settle and close claims that fall within your guidelines • Fully integrated warranty parts tracking Instantly locate stored parts for return to vendor; auto-purge parts upon expiration of OEM required parts retention period
Telematics	<ul style="list-style-type: none"> • Automatically obtain hour meter, location, fuel level, error codes, and geofencing
Performance Reporting	<ul style="list-style-type: none"> • Analyze expenses and profit and loss associated with the service engagement
Customer Feedback Management	<ul style="list-style-type: none"> • Improve service delivery through case management and questionnaires

Parts & Supply Chain Management

ROLE TYPE: Product Support Manager, Parts Manager, Counter Supervisor, Counter Person, Warehouse Manager, Purchasing Agent, Purchasing Manager, Shipping and Receiving, Order Processor.

Parts and Supply Chain Management – connects sales and purchasing processes with logistics, production, and warehouse management to:

- Provide visibility and management throughout the supply chain
- Manage organisational structures with intercompany and multisite needs

Manufacturer Interfaces	<ul style="list-style-type: none"> • Interface parts availability (OEM and dealer share) • Parts ordering • Parts lookup • Parts pricing • Parts replacements & substitutions • Surplus returns • Parts marketing programs • Core management • Parts warranty
Inventory Management	<ul style="list-style-type: none"> • Track items by inventory dimensions including site, warehouse, pallet, location, batch, and serial number • Undertake Poisson planning through unlimited Poisson tables • Incorporates multiple inventory control systems and valuation methods including FIFO / LIFO / Standard cost, moving, and weighted average • Reduce inventory costs and eliminate waste using ABC-analysis • Pull inventory in optimal sequence using “best-before” management and first expired / first out (FEFO) or first in/first out (FIFO) picking guidance • Undertake cycle counting; setting parameters as required
Advanced Warehouse Management	<ul style="list-style-type: none"> • Undertake Warehouse Management with fully RF Wireless operations • Set activities (pick and put) by priority; time of day, customer waiting at counter
Back Order Management	<ul style="list-style-type: none"> • View back order availability by location and name rather than code number • Auto back order release based upon security profiles
Core Management	<ul style="list-style-type: none"> • Sell remaining product and return used within the same document • Easily track core inspection information; temporary storage location, return pallet assigned • Return information and final credit to OEM

Parts & Supply Chain Management continued

Multisite Warehouse Management	<ul style="list-style-type: none"> • Manage storage locations and material handling within multiple warehouses • Apply advanced inbound algorithms using multiple warehouse zones and replenishment strategies • Automatically create branch transfers; individually set branch transfer priorities • Optimize picking with a choice of picking methods • Track inventory 'on hand' per warehouse
Shipping Carrier Interface	<ul style="list-style-type: none"> • Automatically transfer information received from shipping carriers (FedEx, UPS, and Kewill), including freight charges and tracking numbers, to Microsoft Dynamics AX
Quality Management	<ul style="list-style-type: none"> • Improve business processes for quality assurance, quality control, and lot traceability • Manage the test process • Set aside items in quarantine using quarantine orders
Product Management of Goods and Services	<ul style="list-style-type: none"> • Centralize management of products and services across the organisation including BOM and process formulae
Hydraulic Hose Management	<ul style="list-style-type: none"> • Automatically relieve stock of hose competent inventory • Replenish inventory with finish hose • Capture labour to assemble hose
Returns Management	<ul style="list-style-type: none"> • Manage the return order process • Control who can return items, and which items can be returned • Categorize returns according to reason code or method of disposition
Master Planning including Order Promising	<ul style="list-style-type: none"> • Forecast delivery dates using operations or bottleneck scheduling. Calculate available-to-promise (ATP) and capable-to-promise (CTP). Plan across multiple sites.
Forecasting	<ul style="list-style-type: none"> • Enter and edit sales and purchase forecasts • Use specific keys to allocate forecast to individual items and time periods
Intercompany	<ul style="list-style-type: none"> • Automate trade between subsidiaries or distribution centres • Sales and purchase orders can be generated manually or automatically across subsidiaries

Power Systems

ROLES: Dealer Principal, CFO, Controller, Auditor, Accountant, Vice President Power Systems, General Manager of Power Systems, Project Manager, Project Coordinator, Power Systems Sales Representative, Power Systems Purchasing Agent

Power Systems – utilize the functionality of the Project Management and Accounting modules coupled with power systems specific functionality designed by XAPT. Tailored to fit the needs of a long or short term power systems project.

- Integrates with other AX modules including Service, Human Resources, General Ledger, Sales, Procurement, and Production
- Provides a single source (Project) to manage all aspects of a project (Opportunity, Sales Quotes, Purchase Orders, Service Calls, and billings)
- Easily copy and repeat past projects using current costs and sales numbers – ideal for the dealership that also supplies power plants to OEM's

Opportunity Management	<ul style="list-style-type: none"> • Manage multiple quotes or projects under one opportunity • Ensure accurate information by allowing logic to update linked quotes automatically
Prime Product	<ul style="list-style-type: none"> • Indicate an item as a prime product on the released product level • Indicate an item as a prime product on the quotation line level • Ability to track prime product specific details on the equipment and after treatment details
Trade-In Management	<ul style="list-style-type: none"> • Manage and track a trade-in within the power systems project • Include trade-in costs in project financials
Project Budgeting and Cost Control	<ul style="list-style-type: none"> • Unlimited sub-projects. Gain the ability to have one master project for a large, multi-unit installation • Independently track sub-projects • Maintain budgets on a project and subproject level
PSQ Integration	<ul style="list-style-type: none"> • Import configurations to the Quotation, Project, or Project PO
Project Quotations	<ul style="list-style-type: none"> • Easily build power systems quotes using the Power systems quote builder that tracks Bill Of Materials details throughout the entire system (Sales Quote, Project, Purchase Order and Equipment History)
Financial Detail	<ul style="list-style-type: none"> • Analyze budget vs actual using the Power Systems Financial Summary • Track Work in Process • Multiple Level Credit Approval
Service	<ul style="list-style-type: none"> • Create a standard job or template that includes routine tools, items, parts, etc. to save time building power systems related service calls • Standard jobs can be created to be model specific • Generate service calls from the power systems quotation or project to initiate startup work orders
Milestone Billing	<ul style="list-style-type: none"> • Generate and modify milestone billing schedule throughout the entire project lifecycle • Track and invoice milestones straightforwardly • Properly recognize revenue when earned

Procurement and Sourcing

ROLE TYPE: *Purchasing Agent, Purchasing Manager, Employee, Shipping and Receiving, Order Processor*

Procurement and Sourcing facilitates direct and indirect procurement of goods and services, and establishes centralized buyer capability across your organization.

- Centralize buyer capability
- Support procurement policies and processes

Direct Procurement	<ul style="list-style-type: none"> • Manage the entire lifecycle of procurement including returned orders • Undertake direct deliveries, pro forma purchase orders, and landed-cost including freight, insurance, and unrecoverable taxes
Trade Agreements (Vendor)	<ul style="list-style-type: none"> • Manage price and multifaceted discount policies in all currencies • Use workflows to drive compliance with internal policies • Set up prices in a single currency with automatic conversion to vendor's currency
Agreements	<ul style="list-style-type: none"> • Manage agreements based on monetary or volume commitments • Set up agreements with specific terms and conditions • Monitor agreement status
Request for Quotations (RFQ)	<ul style="list-style-type: none"> • Manage the RFQ process including vendor reply, comparison, and selection • Enter vendor replies in the vendor portal • Extend the procurement process with a cloud-based service to facilitate the RFQ (Request for Quotation) process
Vendor Management	<ul style="list-style-type: none"> • Search for, maintain and support vendor requests and approvals via the Enterprise Portal with workflow • Extend the vendor on-boarding process with a cloud-based dialogue to improve the vendor experience
Vendor Self-Service Portal	<ul style="list-style-type: none"> • Enable vendors to update proprietary profile data • Upload catalogue content • Review invoices and payment • Notify vendors of organizational updates • Respond to Requests for Quotations (RFQ) • Monitor vendor performance
Indirect Procurement (Catalogue and Non-Catalogue)	<ul style="list-style-type: none"> • Manage purchase requisitions of indirect goods and services • Use a catalogue-based or non-catalogue-based procurement process supported by an approval workflow determined by organizational hierarchy • Create a Microsoft SharePoint®-based catalogue which supports punch-out capabilities to external vendor sites • Budget check

Procurement and Sourcing *continued*

Category Management	<ul style="list-style-type: none"> • Define different category hierarchies related to commodity codes or catalogue/item hierarchies • Manage overall spending based on categories
Purchasing Policies and Signing Limits	<ul style="list-style-type: none"> • Enforce purchasing policies through a centralized procurement desk • Define policy rules to support global policies and processes; automatic application to purchase requisitions and purchase orders based on the legal buying entity and operating unit • Six policy rules; catalogue, catalogue access, purchase requisition RFQ, purchase requisition control, purchase order creation and demand consolidation • Expenditure reviewers and signing limits
Procurement Reporting	<ul style="list-style-type: none"> • Transactional reports • Pre-defined data cube to generate analytical reports (e.g. vendor and procurement spend analysis, top 100 vendors, vendor performance and KPI's)
Procurement Workflows	<ul style="list-style-type: none"> • Drive and govern procurement operations using workflow • Use a flexible and visual workflow engine to improve efficiency and compliance across the procurement cycle

Sales, Marketing and CRM

ROLE TYPE: Marketing Executive, Sales Manager, Super Sales Representative, Dedicated Sales Representative, Account Manager, Product Support Sales Representative, Marketing Manager and Marketing Junior.

Sales, Marketing and CRM – sales and marketing in Microsoft Dynamics AX 2012 for equipment dealers delivers powerful, integrated customer, sales, and marketing management capabilities.

- Help your team build and strengthen customer relationships
- Know what your customers and prospects are bidding and building
- Increase sales utilizing automated functions
- Perfect for the dealership with many sales and support people responsible for different areas of a customer

Sales Force Automation	<ul style="list-style-type: none"> • Forecast and plan sales • Quickly view changes in the market and adjust future inventory levels accordingly
Trade Agreements (Customer)	<ul style="list-style-type: none"> • Manage price and multifaceted OEM discount policies in all currencies • Manage price revisions through workflows to ensure compliance with internal policies • Set up prices in a single currency with automatic conversion to the customer's currency
Sales Agreement	<ul style="list-style-type: none"> • Manage agreements based on monetary or volume commitments • Set up agreements with specific terms and conditions • Monitor and manage the status of sales agreements • Manage estimated vs. actual costs to drive higher profitability
Marketing Automation	<ul style="list-style-type: none"> • Develop, conduct, follow up, and analyze marketing campaigns for any defined group of customers and prospects
Lead and Opportunity Management	<ul style="list-style-type: none"> • Manage leads and opportunities • Import and track competitive equipment in your territory via UCC integrations • Create, review, update, and manage lead information • Associate employees, responsibilities, and campaign data with stored information
Sales Management	<ul style="list-style-type: none"> • Set, monitor, and manage sales performance of sales personnel, sales units, and sales companies • Assign multiple sales representatives to one account based on market segment or area of responsibility
Connector for Microsoft Dynamics CRM	<ul style="list-style-type: none"> • Share sales information between Microsoft Dynamics AX and Microsoft Dynamics CRM both online and on premise
Case Management (including Sites Services)	<ul style="list-style-type: none"> • Efficiently open, assign, resolve, and follow-up on customer issues from a single form • Extend the case management process with a cloud-based service, facilitating dialogue with customers
Commerce Services	<ul style="list-style-type: none"> • Extend sales reach to include your online storefront and online marketplaces such as OEM parts distribution sites
Sales and Marketing Reporting	<ul style="list-style-type: none"> • Gain insight in sales and marketing performance with predefined KPIs in the sales and Customer Relationship Management (CRM) cubes

Project Management and Accounting

ROLE TYPE: *Project Manager, Project Team Member, Project Sales Member*

Project Management and Accounting – provides Project Managers with increased control across short and long term projects; schedule, resources and financials.

- Increased control
- Visibility of all aspects of the project including schedule, resourcing and finances
- Integrates with other AX modules including General Ledger, Sales, Procurement, and Production

Project Management	<ul style="list-style-type: none"> • Plan, create, manage, control, and complete investment, time and cost projects • Create a project hierarchy comprising multiple subprojects • Easily plan projects of any size; matching work requirements with available resources • Plan and organize projects using Work Breakdown Structure (WBS) templates • Find the right resources for the job with task requirements (skills, education and experience)
Work Breakdown Structures	<ul style="list-style-type: none"> • Create hierarchical Work Breakdown Structures (WBS) • Add specific information; schedule, requirements, estimated cost, revenue, and skills or attributes
Project Resource and Schedule Management	<ul style="list-style-type: none"> • Schedule tasks and allocate resources • Track schedules, manpower usage, and cost-to-complete
Project Time and Expense	<ul style="list-style-type: none"> • Capture project time and expense quickly and accurately • Enter timesheets through project time management or Enterprise Portal with embedded approval process • Charge travel-related expenses against specific projects with expense management • Distribute expenses to a single project or across multiple projects
Project Accounting and Invoicing	<ul style="list-style-type: none"> • Enter and itemize project costs, employee hours, materials used, and fees incurred • Streamline billing of projects • Create and edit invoice proposals for hours, expenses, items, sales orders, fees, subscriptions, advance and deduction payments, or milestones • Split billing enables shared project costs between multiple customers or internal organisations • Retention terms can be specified on customer invoices and vendor payments • Approval workflow ensures accurate project invoices before they are sent to the customer • Schedule payments to project vendors • Retain part of payment to a vendor • Enforce contractual cap on project costs with funding limits
Project Quotations	<ul style="list-style-type: none"> • Quickly build accurate project quotations using Work Breakdown templates • Select the right opportunities to pursue using project quotation profitability • Gain project visibility with quotation approval workflows

Project Management and Accounting *continued*

Revenue Recognition and Work-In-Progress (WIP)	<ul style="list-style-type: none"> • Recognize actual costs to avoid potential cost overruns • Post and accrue revenue for fixed price jobs based on completion percentage or completed contract • Accrue revenue or capitalize costs for time-and-material projects to recognize gross margin • Handle WIP for investment projects before final elimination of the WIP value to a fixed price
Project Budgeting and Cost Control	<ul style="list-style-type: none"> • Manage projects with forecast (hour, expense, item, fee, on-account) and budgets • Approve original budgets and revisions through workflow enabled project budgets • Maintain project cost control by summarising actual cost, committed cost, and remaining budget to discover total expected cost, and compare with the original budget • Measure utilisation rates by comparing actual hours to budgeted hours • Compare the status of invoiced and chargeable transactions of a project or contract with the project quotation
Interoperability with Microsoft Project	<ul style="list-style-type: none"> • Integrate and streamline project delivery with scheduling and resource management capabilities of Microsoft Project Server 2010 • Bi-directional interoperability with Microsoft Project for projects, activities, tasks, and resource allocation
Reporting	<ul style="list-style-type: none"> • Gain insight in project management performance with predefined KPI's in the project accounting cube • Access standard reports including reports for profit and loss, consumed costs, payroll allocation, invoice on-account, actual versus budgeted costs, and cash flow • Use project controls to gain a real-time snapshot of project performance • Use utilisation control to gain a real-time snapshot of project performance

Financial Management

ROLE TYPE: Accountant, Accounting Manager, Accounts Payable Co-ordinator, Accounts Receivable Administrator, Bookkeeper, Chief Executive Officer, Chief Financial Officer, Controller, Treasurer, Budget Manager, Environmental Manager, Credit and Collections Manager

Financial Management - provides a fast and efficient way to:

- Register financial transactions
- Manage parent and subsidiaries
- Manage internal cost accounting
- Control expenditure
- Drive the enforcement of accounting policies and rules

General Ledger	<ul style="list-style-type: none"> • Financial accounting record management • Configuration of multiple and recurring journals • Allocation of cost and income • Supports the creation of closing transactions • Preparation of pre-closing documents and closing books • Unlimited financial dimensions • Advanced account structures and rules
Bank Management	<ul style="list-style-type: none"> • Maintain the legal entity's bank accounts and associate financial instruments • Monitor deposits, payments, drafts, and bank balances with support for electronic payments • Manage letters of guarantee and cheques
Accounts Payable	<ul style="list-style-type: none"> • Match and pay invoices • Allocate charges • Pay expenses, commissions, and salaries • Track purchase order prepayments • Provide vendor access to relevant information through the vendor portal
Accounts Receivable	<ul style="list-style-type: none"> • Assign multiple credit limits • Track invoices, terms, and discounts • Process customer prepayments • Receive and enter customer payments • Monitor credit cheques and manage collections; centralize and monitor all activities by case
Fixed Assets	<ul style="list-style-type: none"> • Manage the full accounting lifecycle of asset; acquisition - depreciation - transfer/disposition • Easy transfer of equipment from new to rental fleet
Cost Accounting	<ul style="list-style-type: none"> • Track, record, and analyse costs at product or activity level at normal, absorption and standard costing methods • Power systems projects; specifically milestone billing and revenue recognition

Business Intelligence

ROLE TYPE: CEO, COO, General Manager, Operations Manager, Service Manager

Business Intelligence – provides dashboard capability to make proactive and responsive decisions based on real-time information.

- Analyze the factors that affect your bottom line with flexible and customizable analysis tools
- Share information throughout the organization
- Make effective changes and improvements
- Take advantage of more than 25 data cubes developed specifically for equipment dealers
- Microsoft Business Intelligence solutions

<p>Microsoft SQL Server Reporting Services</p>	<ul style="list-style-type: none"> • Provide employees instant access to information with built-in reports using Microsoft SQL Server Reporting Services • Automatically generate custom reports with Microsoft SQL Server Report Builder • Access a wide variety of standard reports (more than 800) including analytical reports
<p>Microsoft SQL Server Analysis Server</p>	<ul style="list-style-type: none"> • Drive actionable insights to people across the enterprise using easy-to-use online analytical processing (OLAP) and data-mining capabilities • Microsoft Dynamics AX 2012 provides preconfigured data cubes for areas all important areas of the dealership (finance, equipment sales, product support, rental, power systems, technician skills, etc.) • Employees can easily access data from KPIs in their Role Centre or from Microsoft Excel
<p>Management Reporter</p>	<ul style="list-style-type: none"> • Create boardroom-quality reports without IT assistance • Consolidate across both Microsoft Dynamics ERP and other General Ledgers • Leverage secure report distribution and storage through the centralized Report Library

Human Resource Management

ROLE TYPE: HR Manager, Training Manager

Human Resource Management – provides a fast and efficient way to benefit from a comprehensive framework of capabilities including:

- Storing and managing employee records
- Employee recruitment and training
- Organisation management

Organisation Administration	<ul style="list-style-type: none"> • Administer organisational structures; formal and informal hierarchies • Undertake position and role management
Recruitment and Selection Management	<ul style="list-style-type: none"> • Administer recruitment processes; campaigns, screening, candidate correspondence • Facilitate job posting and application processes through a cloud-based service
Development and Performance Administration	<ul style="list-style-type: none"> • Manage employee skill sets • Make easy assignment decisions; allocating technical assignments according to capability
Skill Tracking	<ul style="list-style-type: none"> • Manage employee skill sets; fully integrated with service management • Track employee certification renewals
Training	<ul style="list-style-type: none"> • Set up, deliver, and analyse training courses
Employee Self-Service Portal	<ul style="list-style-type: none"> • Manage personal information • Enter timesheets • Order products • Process expenses
Travel and Expense	<ul style="list-style-type: none"> • Manage expenses with integrated workflow • Submit travel requisitions for approval including projected cost of travel • Define expense policies and automate the reimbursement of travel expenses • Gain insight into expense behaviour with the expense management data cube
Benefits Administration	<ul style="list-style-type: none"> • Define organisational benefit plans • Enrol workers in benefits • Assign dependent coverage • Designate beneficiaries
Absence Management	<ul style="list-style-type: none"> • Establish, communicate, and monitor absences and associated policies
Time and Attendance	<ul style="list-style-type: none"> • Track profile-based, clock-in/clock-out registrations for workers • Generate pay information to payroll system • Support time entry for revenue based employees and tracking of overheads
Compensation Management	<ul style="list-style-type: none"> • Manage employee compensation

Foundation – Reference Data

Share key reference data across multiple legal entities.

Module	Description
Language	<ul style="list-style-type: none">The Microsoft Dynamics AX user interface, online help, forms, reports, and menus can be displayed in any of the available languages. This includes usage in a variety of business documents including printed reports, invoices, purchase/sales orders and by remote users in the Enterprise Portal interface
Time Zone	<ul style="list-style-type: none">Supports multiple time zones; configured at user level
Currency	<ul style="list-style-type: none">Enables handling of financial transactions in multiple currencies; including currency calculations, and exchange rate retrievalPre-configure a base currency and choose a secondary reporting currencyShare exchange rates across multiple legal entities
Other	<ul style="list-style-type: none">Additional functionality includes other reference data; unit of measure, category, and (fiscal) calendar

Foundation – Master Data

Share key reference data across multiple legal entities.

Module	Description
Organisation Model	<ul style="list-style-type: none">Model organisational structuresConfigure multiple organisational hierarchies to view for multi-dimensional reportingDefine internal organisations; legal entities, operating units, and teamsUse graphical representation to view and edit organisational hierarchies
Global Address Book	<ul style="list-style-type: none">Share information on organisations and people to ensure organisational alignmentExtract information in the global address book as a 'party.' Associated roles include customers, prospects, vendors, employees, competitors, contacts, and workers
Product Information Management	<ul style="list-style-type: none">Centralize management of products and services (non-stock items) across the organisation, including bills of materials (discrete manufacturing), formulae (process manufacturing), variant and configurable productsDescribe items using up to four item dimensions: configuration, size, style, and colourManage the release of products and services to individual legal entities

Global Engines

Use core ERP capabilities, such as tax calculation or resource scheduling, across the organisation spanning multiple legal entities and/or operational units.

Module	Description
Tax Calculation	<ul style="list-style-type: none"> Define flexible, multidimensional tax setup to comply with tax regulations across multiple countries Use tax codes, tax groups, and item tax groups to configure taxes Configure other duties and taxes, including country-specific tax reporting, packaging duties, EU reverse charge tax
Resource Scheduling	<ul style="list-style-type: none"> Plan resources based on production activities and capabilities of resources; tool, machine, vendor, location, and human resource
Questionnaires	<ul style="list-style-type: none"> Design, schedule and execute targeted questionnaires that can be used across functional domains and legal entities Web publishing capability
Document Management	<ul style="list-style-type: none"> Attach documents to records throughout the application; letters, worksheets, and simple notes
Business Policies	<ul style="list-style-type: none"> Define policy rules in functional modules to help guide the flow of business Use the policy framework to define policies including signing limits, expense reports, purchase requisitions, audit control of documents, and payment of vendor invoices
Inventory Dimensions	<ul style="list-style-type: none"> Track physical and financial transactions using inventory dimensions; site, warehouse, location, pallet, batch and serial number
Financial Dimensions	<ul style="list-style-type: none"> Tag transactions using unlimited financial dimensions to track profit, cost centres, departments, value streams, product lines and any other reporting units Update the General Ledger online for fast and accurate financial reporting

Technology Framework: Clients

In every software implementation, the Client provides an interface to Microsoft Dynamics AX data and functionality. An external application is integrated with Microsoft Dynamics AX to programmatically integrate functionality or exchange data. The Windows® client for Microsoft Dynamics AX is a native 32-bit program that provides a rich user interface. Supported web browsers provide access to Microsoft Dynamics AX functionality and data through the Enterprise Portal. External applications interact with Microsoft Dynamics AX via services and Application Integration Framework (AIF).

Module	Description
Windows Client	<ul style="list-style-type: none"> • Power users access ERP data through the Role Tailored Windows client • More than 30 Role Centres provide users with a role-specific “home page” to manage daily tasks effectively • The Role Tailored user interface includes previews, fast tabs, and fact boxes to increase productivity
Internal and External Portal	<ul style="list-style-type: none"> • Portals use SharePoint technology as a foundation • The Role Tailored user interface extends to the SharePoint client which includes a subset of functionality • Microsoft Dynamics AX 2012 includes predefined employee self-service, vendor, and customer portals
Microsoft Office Add-ins	<ul style="list-style-type: none"> • Office add-ins offer access to ERP data from productivity tools used every day; providing bidirectional interoperability with Excel and one-way integration with Word
Help System	<ul style="list-style-type: none"> • Offers help documentation in various formats • Provides the ability to extend the Help System using customer-specific documentation and Help infrastructure

Servers

Module	Description
Database Server	<ul style="list-style-type: none"> Microsoft Dynamics AX 2012 is supported on the SQL Server database. See system requirements for specific versions
Services and Application Integration	<ul style="list-style-type: none"> Microsoft Dynamics AX 2012 includes an application integration framework (AIF) for application-to-application integrations The AIF is the web services framework and uses a component in the Microsoft.NET Framework called Windows Communication Foundation (WCF) WCF provides a foundation for dealing with adapters (such as the Microsoft BizTalk® Server adapter) and network protocols for communication Microsoft Dynamics AX provides a range of preconfigured services
Cloud-Based Services	<ul style="list-style-type: none"> <i>Sites Services:</i> Build microsites that extend business processes to the cloud and integrate easily with the on-premise ERP See functional domain descriptions for predefined scenarios: case request, human resources recruitment, Request For Quotation, and unsolicited vendor registration <i>Payment Services:</i> Accept credit card and debit card payments on-premise and online with PCI Level 1 Certified Service; supporting authorisation, voids, and refunds <i>E-Commerce Services:</i> Extend sales reach to include multiple online channels such as your own online store front and online marketplaces such as eBay <i>Connect Services:</i> Provide employees easy access to training, support, peer networking, and much more directly from within Microsoft Dynamics AX
Role-Based Security	<ul style="list-style-type: none"> Role-based security manages access to data and functionality with users are assigned to (predefined) roles based on their responsibilities and participation in business processes; allowing for automatic role assignment Users can be authenticated with the Active Directory® service or other methods Data security policies in the extensible data security framework allow for managing access to subsets of data including a subset of sales orders or vendors
Other	<ul style="list-style-type: none"> Batch, language, and data access services

Tools

Module	Description
Install, Configure, and Upgrade	<ul style="list-style-type: none"> • A comprehensive set of tools simplify installation, configuration, and upgrade efforts • Microsoft Dynamics RapidStart Services®, improves time to value through easy configuration and deployment using questionnaires • The Data Management Framework provides the purge and archive functions to maintain database size • Access an advanced checklist for installation and upgrades including code and data upgrade tools • Resources to analyse, design, configure, and customize the ERP solution through Microsoft Dynamics AX information sources
Software Change Management	<ul style="list-style-type: none"> • The Microsoft Dynamics AX integrated development environment (IDE) integrates with various version control systems (VCS) including Morph® VCS software or Visual Studio Team Foundation Server
Systems and Data Management	<ul style="list-style-type: none"> • Administrators have the ability to manage the application with Windows PowerShell™ command line interface • The AXutil Monitoring the application server and underlying Windows, database, and application server components are provided through Microsoft System Centre
Workflow and Business Process Management	<ul style="list-style-type: none"> • Improve and automate business processes with workflow extending .NET Workflow Foundation • Workflow provides support across the four steps of the business improvement cycle: design, implementation, run, and analyse • The workflow system includes a graphical workflow editor and is delivered with approximately 60 workflow types across the application • Workflows can be analysed using the predefined workflow analytical cube and associated reports
Integrated Development Environment (IDE)	<ul style="list-style-type: none"> • Developers can access the developer tools through the Morph IDE in the Microsoft Dynamics AX client or through Visual Studio Tools in Visual Studio • Morph includes tools for designing, editing, compiling, and debugging code
Programming Language X++	<ul style="list-style-type: none"> • X++ is the object-oriented programming language that is used in the Morph development environment. X++ has Microsoft Visual C#®-like syntax, and incorporates SQL Server data manipulation statements
Enterprise Search	<ul style="list-style-type: none"> • Enterprise search in Microsoft Dynamics AX 2012 enables users to search through data, metadata, and documents that are attached to records by using either the Microsoft Dynamics AX client or Enterprise Portal • Interoperability with SharePoint Business Data Connectivity Services is provided to use enterprise search. See system requirements for specific software component requirements
Process Documentation	<ul style="list-style-type: none"> • The Task Recorder helps to record tasks in the application; a document, including step-by-step instructions and relevant screenshots, is automatically generated • Document format choices are Microsoft PowerPoint®, Word® or Microsoft Visio® files

Microsoft Productivity and Application Platform Interoperability

Drive innovation, today and tomorrow by working with a Microsoft technology platform that simplifies deployment and lowers Total Cost of Ownership to help your business achieve greater profitability and efficiency.

We work with you to deploy your solution in a way that suits your business; on-premise, in the cloud or as a hybrid model and provide the reassurance of a truly integrated Microsoft solution underpinned by a promise of continuous research, development and innovation – offering peace of mind and a sustainable solution for your business.

Product Suite	Microsoft Product
Business Productivity Solutions	<ul style="list-style-type: none"> • Microsoft Outlook • Microsoft Excel • Microsoft Word • Microsoft Project Server • Microsoft Lync • Microsoft SharePoint
Application Platform	<ul style="list-style-type: none"> • Microsoft SQL Server • Microsoft BizTalk Server • Microsoft System Center
IT Infrastructure	<ul style="list-style-type: none"> • Windows Server
Developer Tools	<ul style="list-style-type: none"> • Microsoft Visual Studio • Microsoft .NET • Windows Communication Foundation • Windows Workflow Foundation
Product Suite	<ul style="list-style-type: none"> • XAPT products
XAPT COMAX	<ul style="list-style-type: none"> • COMAX Interface Studio

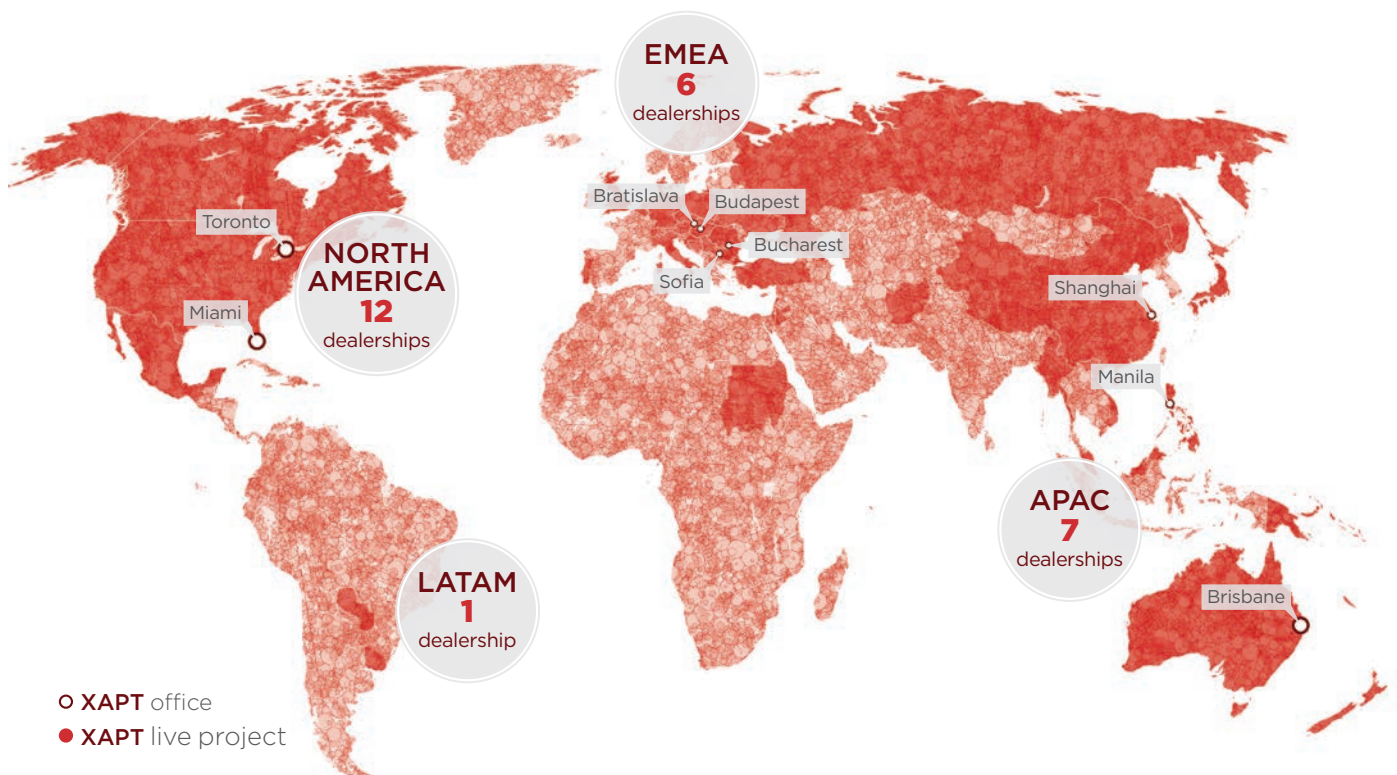
About XAPT

As the leading global provider of specialized business services for equipment dealers, XAPT delivers sustainable value through consulting, software and IT implementation. Possessing more than sixteen years of experience and industry expertise, XAPT maximizes its vast technology resources, unrivaled industry knowledge and deep Microsoft expertise to deliver increased productivity, simplification of business processes, project acceleration and a true competitive advantage to our equipment dealer partners.

Our more than 450 team members in 9 countries apply our industry knowledge and best practices to provide Microsoft Dynamics AX for Equipment Dealers, Customer Relationship Management (CRM) and technology solutions; providing effective support to dealers in standardizing and implementing integrated business solutions according to their unique industry requirements. In addition, XAPT provides consulting, software development, project management, training, system integration and support services to domestic, regional and international dealerships.

NAXT - Microsoft Dynamics AX for Equipment Dealers

NAXT - Microsoft Dynamics AX for Equipment Dealers represents an industry-specific, "end-to-end" business solution for equipment dealers and is unmatched in the equipment distribution industry. The solution offers an outstanding combination of functionality, flexibility, integration, affordability, scalability and ROI. The complex structures of equipment dealerships, their suppliers and customers, demand both global and local knowledge. We bring the reassurance of a fully integrated solution, tailored to equipment dealers, with an understanding of regional requirements, delivered by award winning specialists. XAPT provides clients full visibility and control across every branch and subsidiary, wherever their location.





XAPT
new frontier group

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