NAXT

MICROSOFT DYNAMICS 365 FOR EQUIPMENT DEALERS

XAPT
new frontier group

PRODUCT GUIDE

Microsoft Dynamics 365 for Equipment Dealers

OUR CUSTOMERS SAY

"We want to grow and we want to enhance our processes, and I believe NAXT is the most credible option to achieve this."

Ramnarine Persad
CEO of Massy Machinery

"NAXT has greatly reduced the number of vendors in the computer room. I manage a single solution, not a multitude of disconnected software tools."

John Rose
Information Services Manager of Kelly Tractor Co.

"XAPT Corporation demonstrated a clear understanding of the requirements needed to improve efficiency throughout our multiple departments, business units, and operations."

Alison Fuller
Vice President of Finance and Accounting at Leavitt Machinery

"Our vision in partnering with XAPT is to ensure Briggs has another 25 years of successful information system technology for our employees, customers and suppliers."

Mike Winemiller
President, Briggs International

"The product offers so much more than DBS and ancillary programs."

Rod Ford
CIO of Milton CAT

INTRODUCTION

Equipment dealers and their customers continue to face some of the most difficult business conditions of our time. Those who will succeed and prosper are utilizing technology as a key driver to optimize their dealerships. Competition is increasing, and customers are demanding better service, more efficient distribution, lower costs, and shorter delivery times. Manufacturers are seeking to better integrate with their distributors, seeking increasingly timely information, whilst shareholders and principals are demanding better management of scarce resources.

At XAPT, we understand your business isn't just about equipment. It's about managing and delivering against the expectations of your clients to achieve your profit and growth goals. Enjoy the operational efficiency that results from reducing the volume and complexity of systems within your operation. Make savings through reduced operational costs and Total Cost of Ownership (TCO) and enjoy the benefits of intelligence that will provide the tools you need to exceed your KPI's, deliver growth, and sustain profitability.

ABOUT NAXT

XAPT's flagship product, NAXT is a leading solution for Equipment Dealers on Microsoft Dynamics 365 and Microsoft Azure. Beyond offering ERP and CRM with hundreds of predefined equipment dealership processes, we deliver a full Business Intelligence solution along with a sophisticated mobile application framework. We offer affordable, predictive-maintenance and service contract pricing capabilities by utilizing Microsoft's leading artificial intelligence solutions in the cloud.

XAPT provides clients with full visibility and control across every branch and subsidiary, whatever the location.

In over twenty countries, 440 locations and with 28,000 users, we work closely with Microsoft to utilize all the capabilities of Microsoft Dynamics 365, Azure, Artificial Intelligence, Machine Learning and Big Data analytics to enable the digital transformation of our customers.

Through access to real-time information, our solutions drive real-time decision to provide stakeholders and shareholders with transparency and visibility of performance across assets, resources and financials.

Start using NAXT as your digital transformation platform and begin delivering innovative solutions for your customers.

TANGIBLE BUSINESS BENEFITS

THE BUSINESS PROCESSES YOU NEED

We offer a solution with over 700 business processes designed specifically to your industry. Those processes are documented, have a related Visio diagram, and are preconfigured in the system.

These preconfigured processes are available from day one of your project. We review these with you so you can identify what needs to be configured differently. This reduces your project risk because you establish the requirements you need.

YOUR DIGITAL TRANSFORMATION STARTS HERE

To accelerate your digital transformation and intelligently process data, you need a new type of business application.

We deliver one that breaks down the silos between CRM and ERP, that's powered by data and intelligence, that includes partner solutions for your industry, and that helps capture new business opportunities.

That's Microsoft Dynamics 365 by XAPT for your industry, together with our partners and partner solutions.

BE PREPARED

It is hard to tell from where the next business disruptions will come. That's why it is important to select a business application platform which is solid, is robust, and keeps up with dramatic technology changes.

That technology and business application platform is powered by Microsoft.

BENCHMARK YOUR DEPARTMENTS AND BRANCHES

With a single system and unified processes, you can monitor and rank your branches, locations, or service shops. This enables you to continuously monitor best practices and implement them everywhere. It also enables you to reward actual performance and maintain organizational agility.

GET READY TO PROVIDE COMPLEX SERVICES FOR YOUR CUSTOMERS

Based on our industry survey (together with Associated Equipment Distributors) the growing customer need for integrated, end-to-end services is the number-one industry trend.

With our solution, that is exactly what you will be empowered to do. Handle customer demand as projects, so you can provide a portfolio of equipment and services combined without losing track and with continuously measuring profitability.

VIGILANTLY WATCH YOUR PROFITABILITY

NAXT collects all cost and revenue information on each piece of equipment, regardless if it is the new/used fleet or rental. Furthermore, NAXT collects the services cost and revenue, so each equipment has a holistic financial view.

Quarterly or monthly monitoring of the dealership is not enough anymore. You need to monitor all your sale and rental transactions for profitability. To achieve that, you need instant and aggregated information.

BE ABLE TO KEEP YOUR QUALIFIED WORKFORCE

A qualified workforce is hard to find. Together with growing attrition rates, this represents the third-most obvious trend of the industry (as reported by the AED Survey).

A good, intuitive system can add to a technician's capabilities, by reminding them with checklists, keep them on the right workflow and help speed up onboarding.

The system will not replace experience, but will ensure that less-experienced technicians have the correct procedures to follow based on the specific circumstances they are in.

In addition, native workflows mean that technicians can request and get approval for performing activities outside their usual delegation

PREPARE FOR THE GROWTH IN EQUIPMENT RENTAL

To make equipment rental profitable, you must consider financing cost and depreciation among other costs and compare those to revenue. This feature, combined with NAXT business intelligence, shows how much profit an equipment dealer makes. Based on this information, executives and rental managers can decide which type of equipment and service they should invest in when extending their rental portfolio.

WHY MICROSOFT AZURE?

- Productive: Azure has more than 100 services with great end-to-end tools to make you successful
- Intelligent: Create intelligent apps using powerful data and artificial intelligence services.
- Trusted: Join startups, governments, and 90% of Fortune 500 businesses who run on the Microsoft Cloud today

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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	• New Equipment • Rental Fleet • Pending Trades • Used Equipment • Competitive

Equipment KPI	• Leverage the power of information available via 21 industry specific data cubes including, but not limited to:
	  • Equipment Financial Transactions
	  • Sales Invoices
	  • Rental Utilization
	  • Warranty
	  • Service
	  • Parts
	  • Power Systems

Cost and Revenue	• All equipment costs including, but not limited to:
	  • Acquisition Cost
	  • Capital additions
	  • Capital reductions
	  • Depreciation earned
	  • Rental revenue
	  • Warranty expense, reimbursement and net cost
	  • Expensed repairs

EQUIPMENT MANAGEMENT *CONTINUED*

Cost and Revenue
continued
	• All equipment revenue including, but not limited to:
	  • 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	• Multiple equipment lives allow insight into equipment cost and revenue during different stages of lifecycle, such as:
	  • Rental Fleet
	  • First Retail Sale
	  • Trade in to Used Equipment Fleet
	  • Second Retail Sale

Visibility	• 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	• 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	• 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	• 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	• Financially affix an attachment or work tool to a carrier • Easily track service history and utilization of attachments
Insurance Management	• Verify the presence of proper coverage; provides the ability to sell LDW as an optional item on a contract
Scheduling	• 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	• In areas where a notice to owner is required, automatically generate and transmit requisite notices to the correct party
Incidental Charges	• 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: • 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	• View equipment on rent • Ship and receive equipment from the yard • View customer rental rates • View current list of equipment assigned on rent

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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

Service (work order)	• 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 365
Service Agreements	• 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
Skill Tracking	• Manage employee skill sets • Allocate technical assignments based on skill level and certification • Track employee certification renewals

SERVICE MANAGEMENT *CONTINUED*

Technician Time Management	• 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
Standard Job Management	• 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	• Create service tasks and appointments within the Microsoft Outlook messaging and collaboration client • Gain full visibility through graphic field and shop floor scheduling screens ◦ 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	• Register repair tasks • Undertake diagnosis tracking and record resolution • Identify faulty products
Warranty Management	• 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	• Automatically obtain hour meter, location, fuel level, error codes, and geofencing
Performance Reporting	• Analyze expenses and profit and loss associated with the service engagement
Customer Feedback Management	• Improve service delivery through case management and questionnaires

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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	• 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	• 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	• 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	• View back order availability by location and name rather than code number • Auto back order release based upon security profiles
Core Management	• 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	• 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	• Automatically transfer information received from shipping carriers (FedEx, UPS, and Kewill), including freight charges and tracking numbers, to Microsoft Dynamics 365
Quality Management	• 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	• Centralize management of products and services across the organisation including BOM and process formulae
Hydraulic Hose Management	• Automatically relieves stock of hose competent inventory • Replenish inventory with finish hose • Capture labour to assemble hose
Returns Management	• 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	• Forecast delivery dates using operations or bottleneck scheduling. Calculate available-to-promise (ATP) and capable-to-promise (CTP). Plan across multiple sites.
Forecasting	• Enter and edit sales and purchase forecasts • Use specific keys to allocate forecast to individual items and time periods
Intercompany	• 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 – 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 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	• Manage multiple quotes or projects under one opportunity • Ensure accurate information by allowing logic to update linked quotes automatically
Prime Product	• 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	• Manage and track a trade-in within the power systems project • Include trade-in costs in project financials
Project Budgeting and Cost Control	• 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	• Import configurations to the Quotation, Project, or Project PO
Project Quotations	• 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	• Analyze budget vs actual using the Power Systems Financial Summary • Track Work in Process • Multiple Level Credit Approval
Service	• 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	• 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	• 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)	• 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	• Manage agreements based on monetary or volume commitments • Set up agreements with specific terms and conditions • Monitor agreement status
Request for Quotations (RFQ)	• 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	• 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	• 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

PROCUREMENT AND SOURCING *CONTINUED*

Indirect Procurement (Catalogue and Non-Catalogue)	• 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
Category Management	• Define different category hierarchies related to commodity codes or catalogue/item hierarchies • Manage overall spending based on categories
Purchasing Policies and Signing Limits	• 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	• 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	• 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 365 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	• Forecast and plan sales • Quickly view changes in the market and adjust future inventory levels accordingly
Trade Agreements (Customer)	• 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	• 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	• Develop, conduct, follow up, and analyze marketing campaigns for any defined group of customers and prospects
Lead and Opportunity Management	• 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	• 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
Case Management (including Sites Services)	• 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	• Extend sales reach to include your online storefront and online marketplaces such as OEM parts distribution sites
Sales and Marketing Reporting	• 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 modules including General Ledger, Sales, Procurement, and Production

Project Management	• 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	• Create hierarchical Work Breakdown Structures (WBS) • Add specific information; schedule, requirements, estimated cost, revenue, and skills or attributes
Project Resource and Schedule Management	• Schedule tasks and allocate resources • Track schedules, manpower usage, and cost-to-complete
Project Time and Expense	• 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	• 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	• 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)	• 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	• 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	• 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	• 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

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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	• 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	• 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	• 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	• 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	• Manage the full accounting lifecycle of asset; acquisition – depreciation – transfer/disposition • Easy transfer of equipment from new to rental fleet
Cost Accounting	• 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 in order to:

- Analyze the factors that affect your bottom line with flexible and customizable analysis tools
- Share information throughout the organization
- Make effective changes and improvements
- Apply Microsoft Business Intelligence solutions

Dashboards	• Get real time data via embedded KPI's and alerts within NAXT D365 • Analytical workspaces with embedded Power BI to access interactive "near real-time" reports • Users have the ability to customize their workspaces with those reports most relevant to their needs • You can use multidimensional analytics as well, which means high complexity reports can be run large volumes of data and accessed by various reporting tools

Power BI	• A self-service business intelligence (BI) platform used to discover, analyze, visualize data, and share or collaborate these insights with colleagues
	• The benefits of Power BI with Microsoft Dynamics 365 are:
	  • to take advantage of pre-built Power BI reports for Microsoft Dynamics 365
	  • to use Power BI Desktop to modify and customize your reports and visualizations
	  • to embed your own Power BI reports within Microsoft Dynamics 365
	  • to use Power BI and Microsoft Office Excel together
	• Power BI can be connected to any public data source (D365 FOE or/and other)

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CUSTOMER PORTAL

Allow your customers to interact with areas that are important to them.

Allow your customers to interact with areas that are important to them.

- Review invoices and pay balances online
- Research service history and request a service appointment, field or shop
- Review rental equipment and the utilization by jobsite, machine type, or, specific serial number
- View and request equipment for sale
- Order parts directly from your website, or pass through to OEM website

Finance	• Research all invoices (open and paid) • Initiate payment of invoices • Dispute an invoice • Review all current and closed contracts

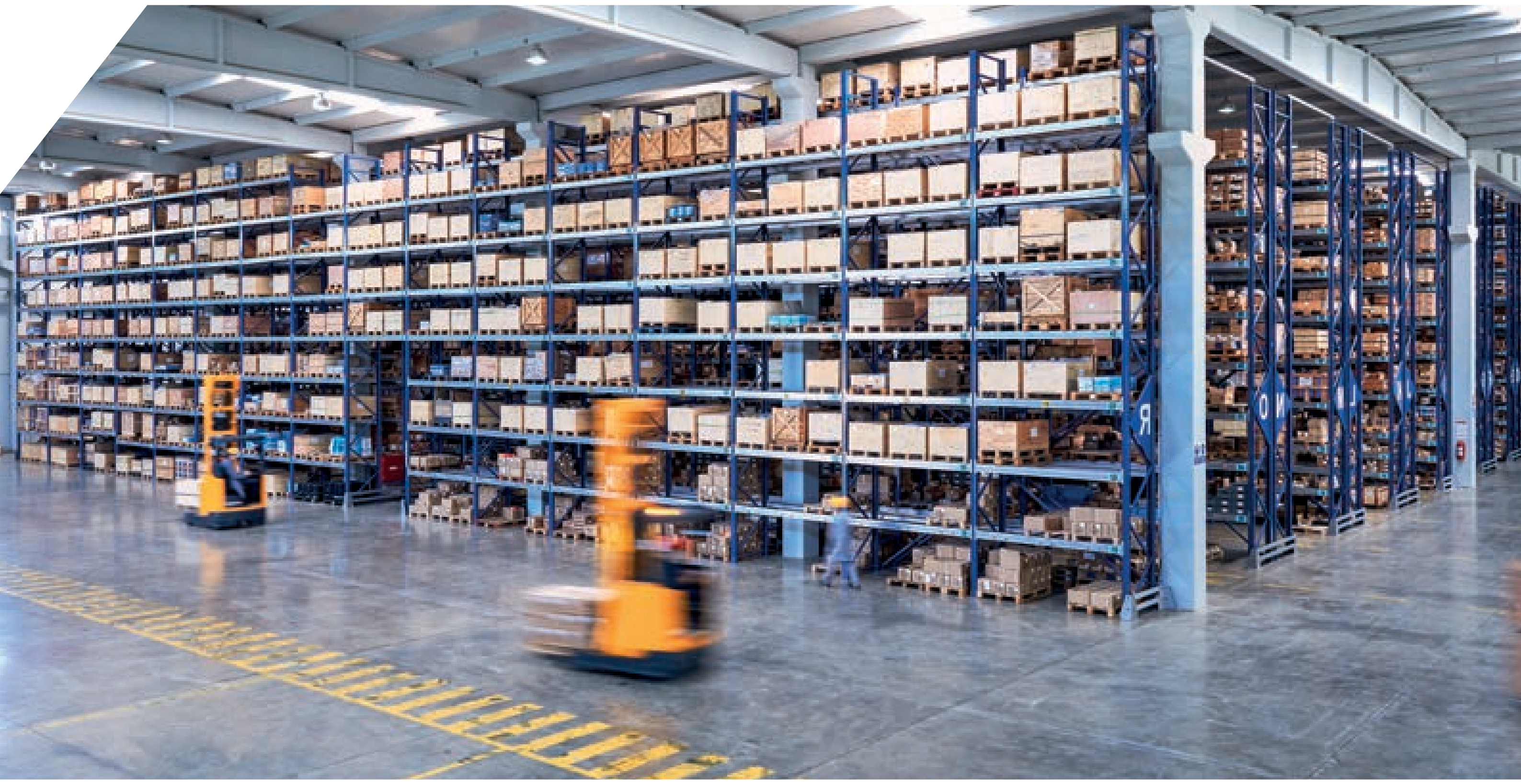
Rental	• View equipment on rent:
	  • All equipment
	  • Equipment located on a specific jobsite
	  • Equipment by type (i.e.: wheel loader, articulated truck)
	• View utilization:
	  • By specific serial number
	  • Jobsite utilization
	  • Fleet utilization
	• View dealer equipment rental availability
	• View current rental reservations
	• Initiate a rental request
	• Initiate a service request on a specific piece of equipment on rent
	• Quickly confirm or reject a rental quotation
	• View all rental contracts, current and historical

Service	• Fleet management:
	  • View your entire equipment fleet
	  • Update and modify your equipment fleet information (hour meter, service intervals, etc.)
	  • Monitor and understand true O&O costs
	• View all service history, including warranty service
	• Telematics:
	  • Review operating hours (daily, weekly, by job)
	  • Review geographic operation locations (from first date in service)
	  • Review fault (error) reporting

CUSTOMER PORTAL *CONTINUED*

Service *continued*	• Review Oil Sample Results and Historical Data • Review Factory Service Letters (understand what has been retrofitted and what is still required) • Review the status of service contracts by specific equipment, sub-fleet or contract • View the status of all open service calls • Initiate a service request

Parts	• Enable your own online storefront, display and sell:
	  ◦ OEM parts
	  ◦ Allied products
	  ◦ Hardware store items
	  ◦ Dealer specials
	• Link to OEM online parts sales websites



MOBILITY

Features

- Sales & CRM functionality – complete virtually all Sales and CRM activities
- Rental functionality – view available and committed fleet
- Service – allow technicians to complete their entire day through their mobile device
- Inventory – scan smart bar codes with your mobile device
- Attachments – Directly import photographs and supporting documents from mobile device to any record within the system

CRM	• Rapidly and efficiently view all prospects, leads, and opportunities, assigned to you • Manage and track lead and opportunity progress • Sort prospects and customers by location to quickly ascertain who is nearby • Create new prospects and new opportunities on the fly • Update prospect and customer records • View all customer activity: Whole goods sales, Equipment rental activity, Power Systems activity, Product Support activity
Rental	• Update equipment location • Update equipment hour meter readings • View available and committed rental equipment • Complete a rental inspection • Ship rental equipment • Receive rental equipment • View rental history

Service	• Download activities and complete your work in a disconnected environment. When you are back in range (either cellular or wi-fi) your phone will sync these activities in the background:
	  ◦ Clock in/clock out of individual segments
	  ◦ Update hour meter readings
	  ◦ Enter notes
	  ◦ Review equipment or component warranty status
	  ◦ Obtain customer signature
	  ◦ Take and attach photographs to a segment
	  ◦ Complete an inspection using a checklist
	  ◦ Complete a service report
	  ◦ Automatically notify your manager when a segment is completed
	• Generate upsell activities for additional repairs by creating additional segments and sell them on the spot
	• Record measurements, pressures, speeds in real time
	• Photograph, video and share phenomenal issues with technical support
	• Order parts
	• Create purchase orders for miscellaneous materials charged and priced

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	• Administer organisational structures; formal and informal hierarchies • Undertake position and role management
Recruitment and Selection Management	• Administer recruitment processes; campaigns, screening, candidate correspondence • Facilitate job posting and application processes through a cloud-based service
Development and Performance Administration	• Manage employee skill sets • Make easy assignment decisions; allocating technical assignments according to capability
Skill Tracking	• Manage employee skill sets; fully integrated with service management • Track employee certification renewals
Training	• Set up, deliver, and analyse training courses
Employee Self-Service Portal	• Manage personal information • Enter timesheets • Order products • Process expenses
Travel and Expense	• 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	• Define organisational benefit plans • Enrol workers in benefits • Assign dependent coverage • Designate beneficiaries
Absence Management	• Establish, communicate, and monitor absences and associated policies
Time and Attendance	• 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	• Manage employee compensation

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FOUNDATION – REFERENCE DATA

Share key reference data across multiple legal entities.

MODULE	DESCRIPTION
Language	• The Microsoft Dynamics 365 for Finance and Operations user interface, online help, forms, reports, and menus can be displayed in any of the available languages
Time Zone	• Supports multiple time zones; configured at user level
Currency	• Enables handling of financial transactions in multiple currencies; including currency calculations, and exchange rate retrieval • Pre-configure a base currency and choose a secondary reporting currency • Share exchange rates across multiple legal entities
Other	• Additional functionality includes other reference data; unit of measure, category, and (fiscal) calendar

FOUNDATION – MASTER DATA

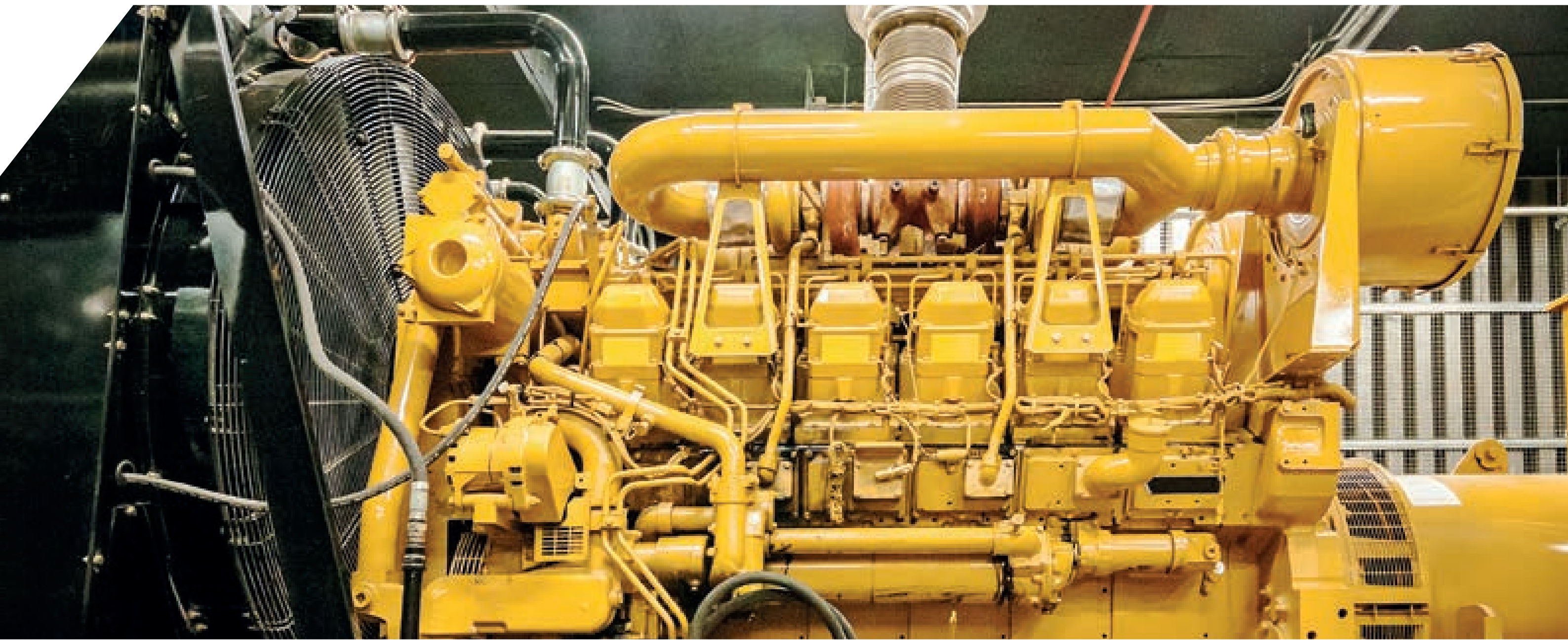
Share key reference data across multiple legal entities.

MODULE	DESCRIPTION
Organisation Model	• Model organisational structures • Configure multiple organisational hierarchies to view for multi-dimensional reporting • Define internal organisations; legal entities, operating units, and teams • Use graphical representation to view and edit organisational hierarchies
Global Address Book	• Share information on organisations and people to ensure organisational alignment • Extract information in the global address book as a "party". Associated roles include customers, prospects, vendors, employees, competitors, contacts, and workers
Product Information Management	• Centralize management of products and services (non-stock items) across the organisation, including bills of materials (discrete manufacturing), formulae (process manufacturing), variant and configurable products • Describe items using up to four item dimensions: configuration, size, style, and colour • Manage the release of products and services to individual legal entities

TECHNOLOGY FRAMEWORK: CLIENTS

In every software implementation, the Client provides an interface to Microsoft Dynamics 365 for Finance and Operations data and functionality. An external application is integrated with Microsoft Dynamics to programmatically integrate functionality or exchange data. The Web client for Microsoft Dynamics provides a rich user interface. Supported web browsers provide access to Microsoft Dynamics functionality and data. External applications interact with Microsoft Dynamics via services and OData and DMF (Data Management Framework)

MODULE	DESCRIPTION
Browser based web client	• Power users access ERP data through the Role Tailored Web client • Workspace 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	• 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 includes predefined employee self-service, vendor, and customer portals
Microsoft Office Add-ins	• 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	• Offers help documentation in various formats • Provides the ability to extend the Help System using customer-specific documentation and Help infrastructure • Wiki and TaskGuide help



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	• 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	• Plan resources based on production activities and capabilities of resources; tool, machine, vendor, location, and human resource
Questionnaires	• Design, schedule and execute targeted online questionnaires that can be used across functional domains and legal entities
Document Management	• Attach documents to records throughout the application; letters, worksheets, and simple notes
Business Policies	• 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	• Track physical and financial transactions using inventory dimensions; site, warehouse, location, batch and serial number
Financial Dimensions	• 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

SERVERS

MODULE	DESCRIPTION
Database Server	• Microsoft Dynamics is supported on the Azure SQL Server database. See system requirements for specific versions
Cloud-Based Services	• *Sites Services:* 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
	• Payment Services: Accept credit card and debit card payments on-premise and online with PCI Level 1 Certified Service; supporting authorisation, voids, and refunds
	• E-Commerce Services: Extend sales reach to include multiple online channels such as your own online store front and online marketplaces such as eBay
	• Connect Services: Provide employees easy access to training, support, peer networking, and much more directly from within Microsoft Dynamics 365
Role-Based Security	• 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 Azure 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	• Batch, language, and data access services

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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
O365	• Microsoft Outlook • Microsoft Excel • Microsoft Word • Microsoft Project Server • Microsoft Lync • Microsoft SharePoint
Azure Application Platform	• Microsoft Azure SQL Server • Microsoft BizTalk Server • Microsoft Dynamics Lifecycle Services • PowerBI, Flow, LogicApp, PowerApp
IT Infrastructure	• Windows Server
Developer Tools	• Microsoft Visual Studio • Microsoft .NET • Windows Communication Foundation Windows Workflow Foundation
Product Suite	• XAPT products and COMAX Interface Studio

ABOUT XAPT

At XAPT, we believe that information technology can change the world for the better. With more than 18 years' experience in the equipment industry, we also understand how it shapes the world to be a better place. We are proud to work with many equipment dealers, manufacturers and Microsoft to enhance our solutions, offering you continuous research, development and innovation.

We employ hundreds of professionals around the globe to focus on providing a leading dealership solution for equipment dealers. We offer over 700 industry-specific processes, enabling your dealership to gain from industry leading best practices and achieve success quickly.

We speak the equipment industry's language

We know the industry well. We have built a team of dedicated consultants who understand the specific needs of the industry and work with dealers across the globe, gaining global insight with wide-ranging industry knowledge.

Gold
Microsoft
Partner
Microsoft

Global presence, local implementations

Supporting complex structures of equipment dealerships, their suppliers and their customers, requires both global and local knowledge. We bring the reassurance of a fully-integrated solution specifically tailored to the regional requirements of equipment dealers, delivered by award-winning specialists. XAPT provides clients with full visibility and control across every branch and subsidiary.

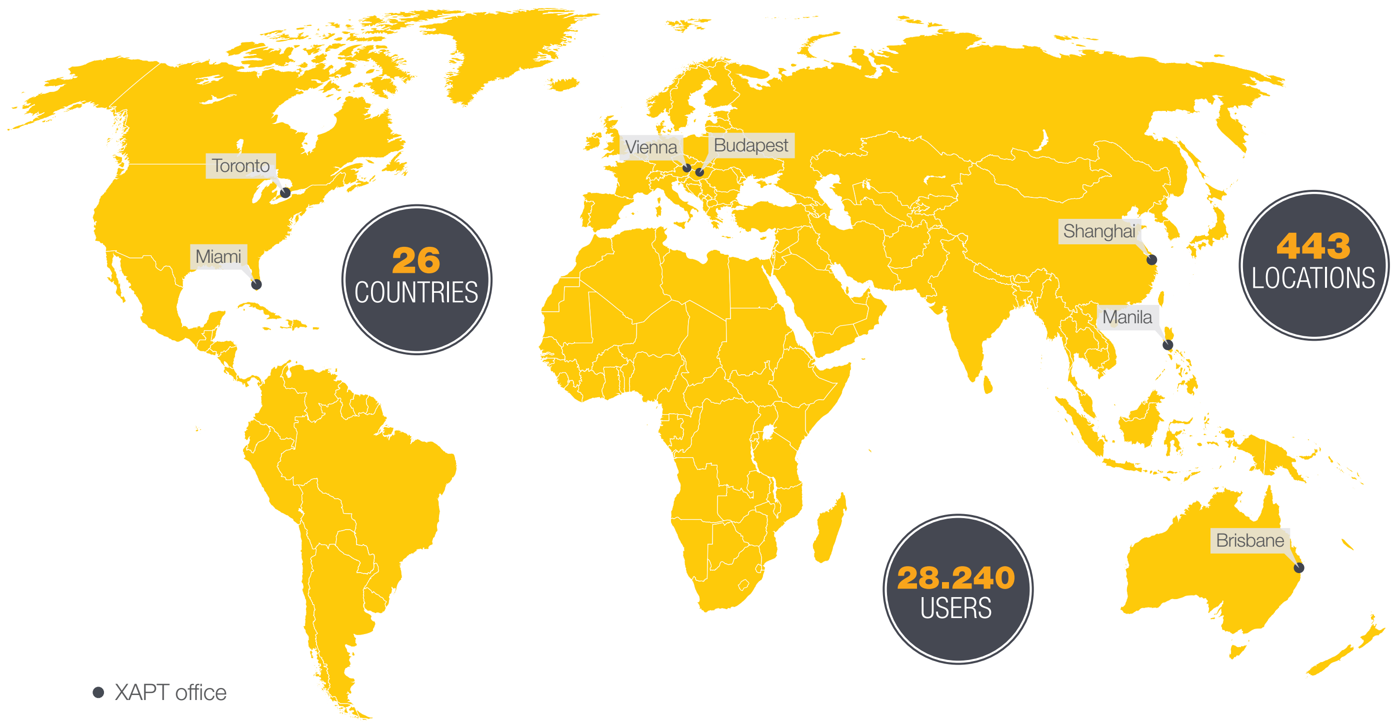
We apply the latest Microsoft technologies

As a key Microsoft partner, we help define Microsoft Dynamics 365 enhancements and have access to the newest products first, so we are always able to offer the latest Microsoft solutions to our customers.

We deliver projects around the globe

With offices in four continents, we are experienced in implementing systems across multiple countries, cultures, and languages. We have over 28,000 users of our solution at over 400 locations.

XAPT is a division of the New Frontier Group, which operates in fourteen countries world-wide with over 1,500 people.



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