

IntegrYS Solutions

Partnership Process



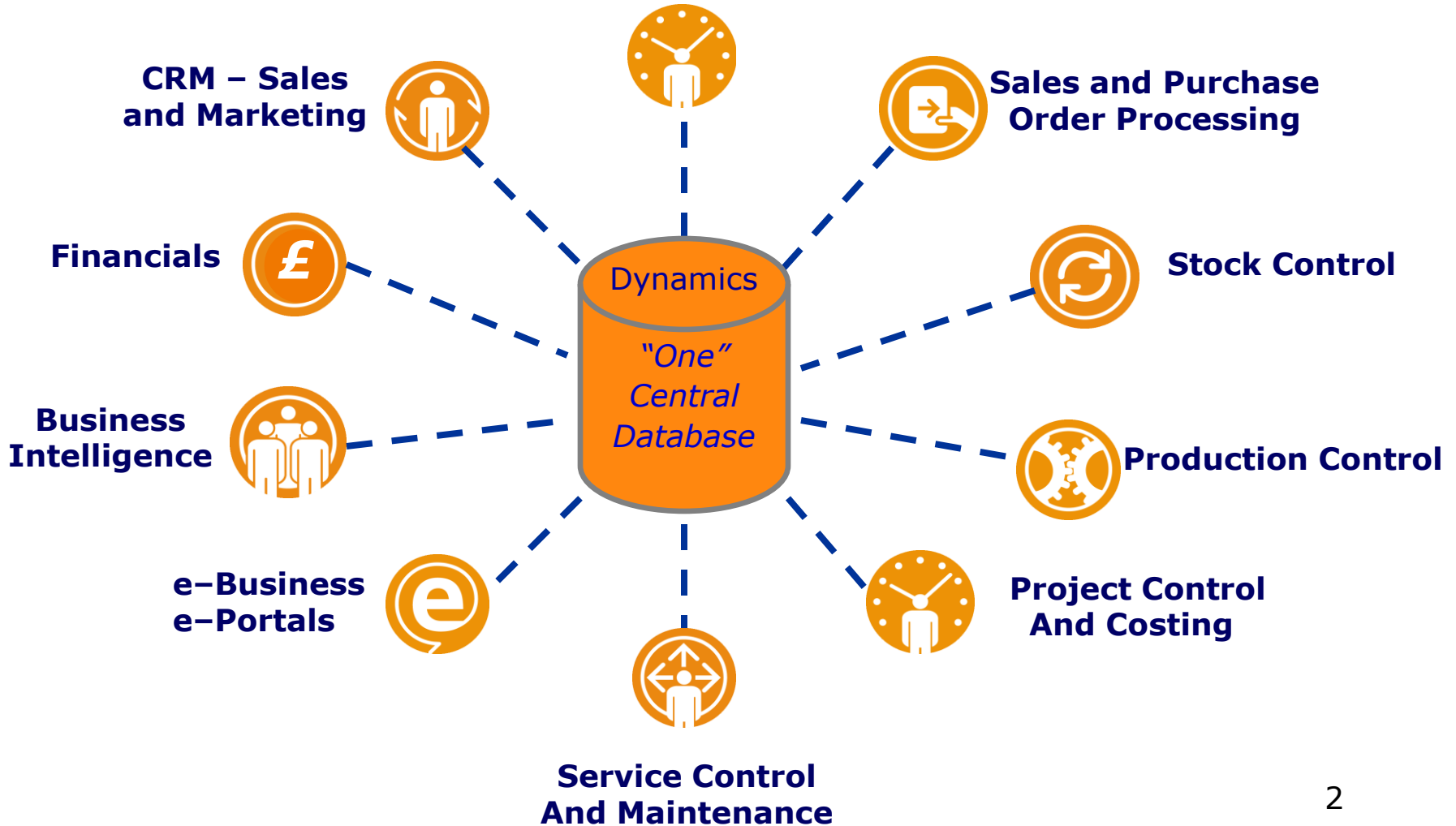
Microsoft Dynamics AX
Business Management Software





Microsoft Dynamics AX Integrated Business Management Software "All In One"

Estimating





IntegrYS Partnership Process

Initial Contact and Introduction

Identify Key System Requirements and Business Initiatives

Microsoft Dynamics AX System Overview & Demonstration

Provide Budgetary Costs

Evaluation Workshop Process and Business Diagnostic

Business Analysis Report

Provision of Proposal

Customer Acceptance

Project Planning and Management

Setup of Training Environment

Launch Training

Operational Training

Implementation Support

Regular Project Progress Reviews

Go Live – Post Go Live Support

IntegrYS Partnership Process Overview Presentation and Demonstration

- **Microsoft Dynamics AX System Overview**

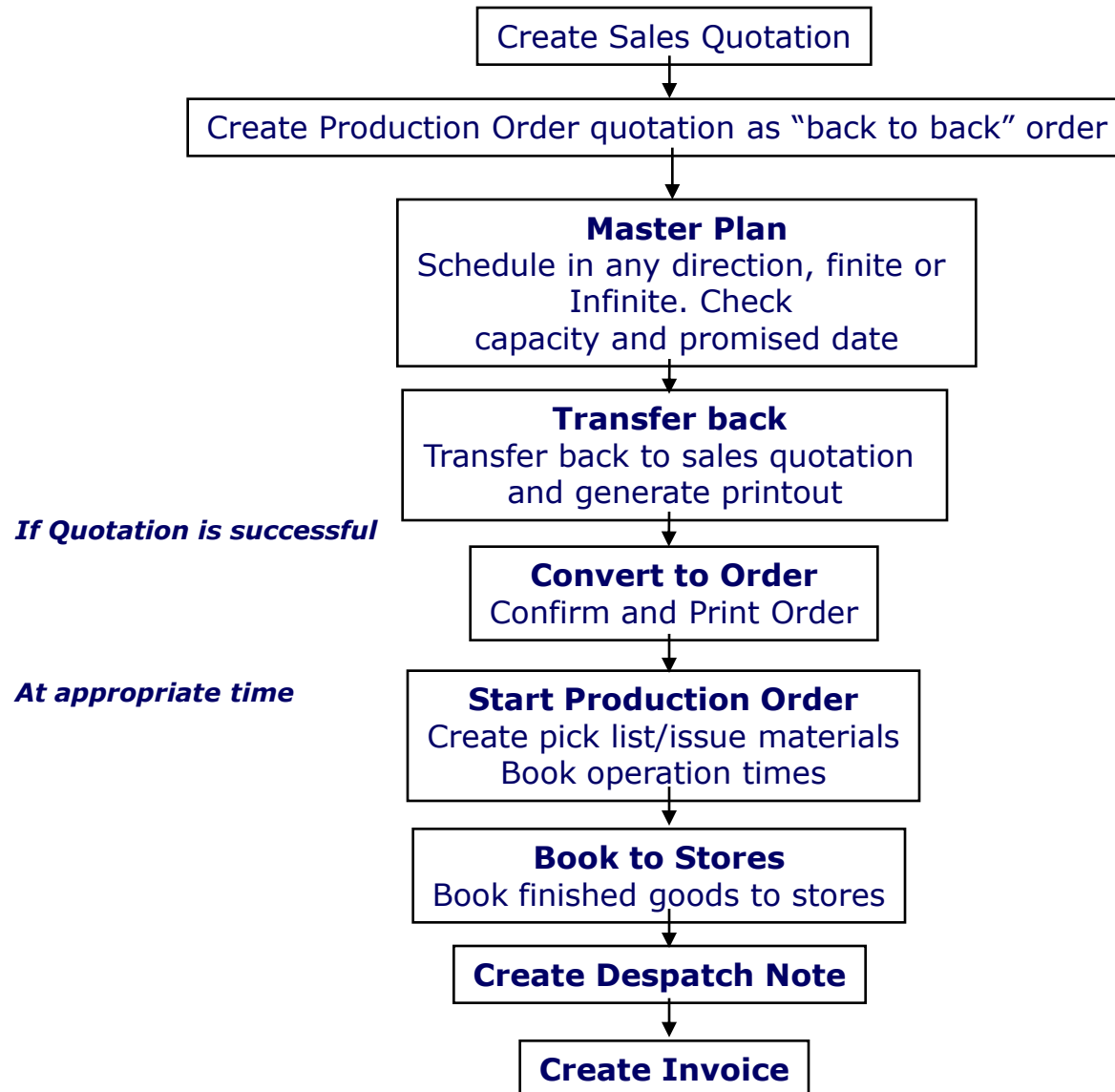
- **Windows Outlook interface**
- **Navigation**
- **Screen editing**
- **Searching facilities**
- **Reporting facilities**
- **On-line real time integration**
- **Notes facilities**
- **Drill down enquiries**
- **Graphical on-line analysis - OLAP**
- **Statistical analysis**
- **3rd Party product integration**
- **Document handling**

- **Customer Specific Demonstration**





Business Process Demonstration Estimate Entry through to Despatch & Invoice





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Partnership Process Evaluation Workshops Purpose & Attendees

Purpose

- **To give users the opportunity to see the modern facilities, functionality and flexibility of Microsoft Dynamics AX in action**

Attendees

- **Key users from each functional area on each day**
- **Key implementation project team members on all days**

Partnership Process Evaluation Workshops



Sales & Purchase Order Processing



Production Control



Project / Contract Control



Service Control & Maintenance



Financials



Agenda

Sales Order Processing

- Customer Account Set-up
- Pricing and Discounting Facilities
- Quotation creation
- Conversion to order
- Notes and documents handling
- Blanket orders and call-offs
- Order picking and despatch
- Invoicing requirements
- Order entry "accelerators"
- Related Enquiries, Reports and Statistics
- Questions and Answers



Agenda

Purchase Order Processing

- Supplier Set-up
- Pricing and Discounting Facilities
- Review MRP Parameters, Run MRP – Review Output
- Review Conversion of Purchasing Proposals
- Adding Order Charges, Maintenance of Order Totals
- Order Entry and Print
- Order Copy Facilities
- Creation of Goods Received Notes
- Movement of Goods from Goods Inwards Through to Stock
- Label Printing, Transaction Splitting
- Related Enquiries, Reports and Statistics
- Questions and Answers



Agenda

Production Control/MRP/WIP Feedback/Progress

MRP

- Review MRP Parameters/Run MRP – Review Output
- Review Conversion of Production Proposals
- Production Order Facilities – Maintain BOM/Route/Planned Job Cost/Order Status
- Review Enquiries – Critical Stock Levels/Capacity Reservations/Shortage Lists
- Graphical Load Planning
- Master Planning – Forward to Define Earliest Date to Promise Customer
- Master Planning – Backward from Known Delivery Date
- Related Reports

JOB PROGRESS

- Releasing Orders to Production – Job Cards, Route Cards
- Starting Orders – Kit Issues, Pick Lists
- Use of Multi-Worksheets
- Record Operation Feedback – times, quantities, scrap, reasons
- Booking Finished Stock to Stores
- Related Enquiries, Reports and Statistics
- Questions and Answers

SUBCONTRACT CONTROL

- Automatic Creation of Subcontract Orders
- Issue of Materials to Subcontractors
- Receipt of Goods Back Into Stock or to Next Operation



Agenda

Contract/Job Control with Project Module

- New Project Creation
- Level Sub-division
- Integration with Document Manager
- Budget Creation for Costs, Employees, Items, Revenues
- Special Pricing
- Quotation/Bid Generation
- Project Copy Facilities
- Conversion to a live project
- Contract Procurement – from stock/manufacture
- Contract Procurement - direct to site
- Employees/Teams Scheduling – discuss Synchronising with Outlook
- Subcontractor Control
- Timesheet Registration, booking costs to job
- Progress monitoring
- Recording progress of project (surveyors etc)
- Applications for Payment
- Invoicing Options
- Related Enquiries, Reports and Statistics



Agenda

Service Management

- Service contract creation
- Contract types and payment plans
- Creation of service “objects”
- Job types, parts lists and labour requirements
- Creation of planning sequences
- Routine service planning and authorisation
- Call logging/Job creation and entry of details
- Job assignment to engineer
- Recording job progress – hours and materials
- Service stock control and procurement for jobs
- Invoicing regular and unplanned service and repairs
- Reports and enquiries



Agenda

Financials

Nominal Ledger

Structuring the Chart of Accounts

- Use of Ledger Dimension Codes
- Extending the Chart of Accounts for Consolidation
- Multi Currency Configuration
- Defining Accounting Periods
- End of Year Procedures

Customer Set-up and Maintenance

Customer Details

- Alternative Addresses
- Balance Reports
- Reports, Enquiries and Statistics

Supplier Set-up and Maintenance

Creation of Supplier Accounts

- Management of Supplier Accounts
- Creation of Supplier Groups and Group Ledger Accounts
- Defining Default Values for Account Transactions



Partnership Process Evaluation Workshops Key Benefits

- **Users see their own business processes on a modern system**
- **Users can contribute to system selection – feel involved**
- **Users made aware of the facilities of a modern Windows system**
- **Experiences from our previous Dynamics AX implementations can be shared**
- **Users spend time with experienced consultants**
- **Stimulates new ideas – many current practices disappear**
- **Simple solutions to specific requirements formulated and agreed**

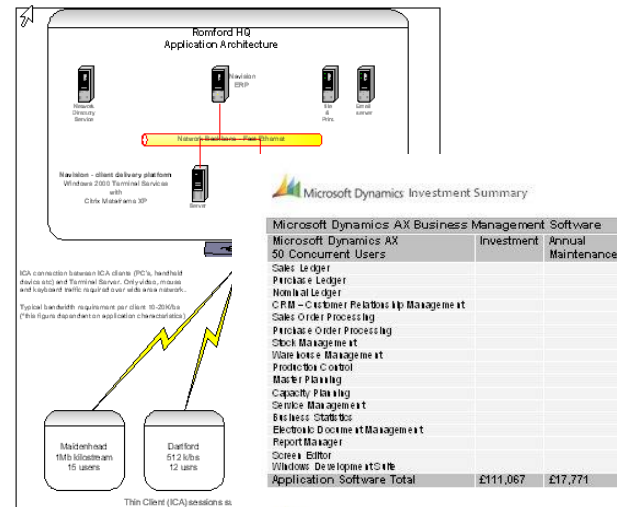


Partnership Process Evaluation Workshops Key Benefits

- **Minimise need for bespoke work**
- **Customer project team gains confidence in the solution**
- **Team is committed and enthusiastic**
- **Company know what they are buying in to**
- **Overall scope of system usage and achievable benefits well defined**
- **Achievable project timescales and milestones can be identified**
- **Eliminates assumptions and surprises**

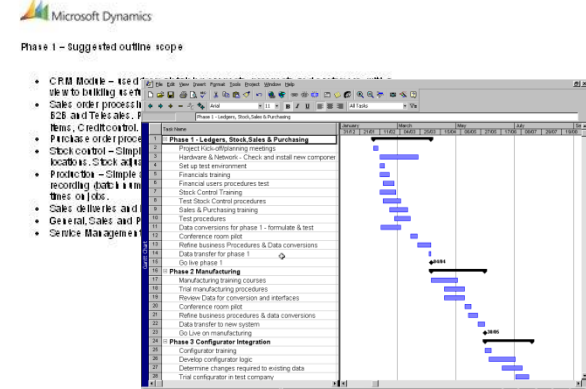
Partnership Process Proposal

- Introduction
- Management Summary
- Proposed Client Solution
 - Software
 - Hardware
 - Professional Services
 - Support & Maintenance
- Business Analysis Report
- Update Investment Summary
- Outline Project Plan



Microsoft Dynamics Investment Summary

Microsoft Dynamics AX Business Management Software	Investment	Annual Maintenance
Microsoft Dynamics AX 50 Concurrent Users		
Sales Ledger		
Purchase Ledger		
Financial Ledger		
CRM - Customer Relationship Management		
Sales Order Processing		
Purchase Order Processing		
Stock Management		
Warehouse Management		
Production Control		
Master Planning		
Capacity Planning		
Service Management		
Business Statistics		
Electronic Document Management		
Report Manager		
Scorecard		
Windows Deployment Kit		
Application Software Total	£111,067	£17,771





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Project Implementation

- **Project Planning Meetings**
 - *Formal project team agreed*
 - *Task team leaders appointed*
 - *Project plan and milestones defined*
 - *Forward training schedule defined*
 - *All other actions agreed*

- **Set-up Training Environment**
- **Formal Training Sessions**
- **Onsite Implementation Support**
- **Regular Project Progress Reviews**
- **Go Live – Post Go Live Support**

