Microsoft® Navision Axapta®

Microsoft Navision Axapta Enterprise Portal empowers your business community, through Internet connectivity, opening new paths to profit.

Key Benefits:

- Anytime, anywhere access to data
- Improve communication and collaboration throughout your business community
- One entry point grants you access to everything you need
- Intuitive Web layout for walk-up usage
- High ROI – deploy Intranet, Extranet, and Web solution as needed without hassle
- No need to buy third party software
- Reduce the cost of distributing and sharing information
- Every user can choose from 23 languages and local currencies

Why Microsoft Navision Axapta Enterprise Portal?

The Microsoft Navision Axapta Enterprise Portal is a Web solution that enables your business community to work directly with your Enterprise Resource Planning (ERP) system via personalized websites using the Internet. By connecting your entire business community in new and exciting ways, it removes traditional boundaries and sharpens your competitive edge.

Everyone who plays a role in your business is a member of your business community. That includes employees, customers, vendors and other business partners. The days of playing phone tag with suppliers, sales and warehouse staff struggling with mismatched stock information and a human resource department burdened with employee hour and holiday registration are over. Axapta Enterprise Portal automates these processes.

Using the Internet you interact with the people who have the information you need; or need the information you have. The aim is to optimize workflow with anytime, anywhere access to accurate data. With Axapta Enterprise Portal, your business never closes. It is open 24/7.

The basis for successful collaboration using the Internet is ease of use and Axapta Enterprise Portal delivers. Your business partners connect instantly

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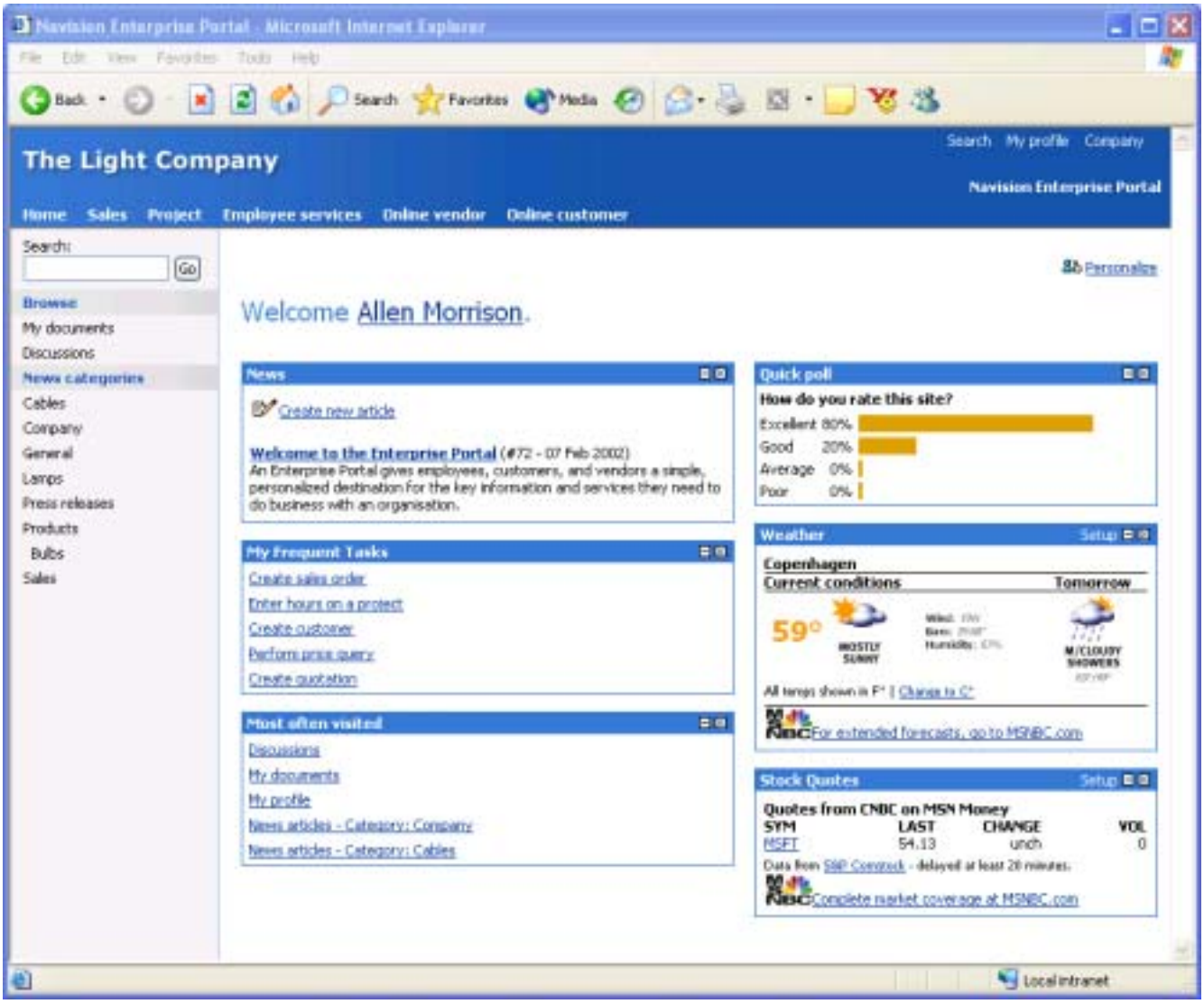
using only the Internet and immediately feel comfortable due to the intuitive Web layout. Only the information and services they need are presented. Users can view relevant information and reports, publish documents such as customer orders, register project hours and participate in discussion forums.

You decide which information you want to share and with who you want to share it. All of the access rights are assigned on an individual basis. For example, information on a customer-specific product will only be available to that customer.

New connectivity, new energy

With Axapta Enterprise Portal, your business is connected in ways that were simply not possible before. By delivering cost-effective connectivity and making the most of what the Internet has to offer, it enables novice users and external contacts who previously worked outside your ERP system, to connect and work directly with the ERP data.



Employee homepage

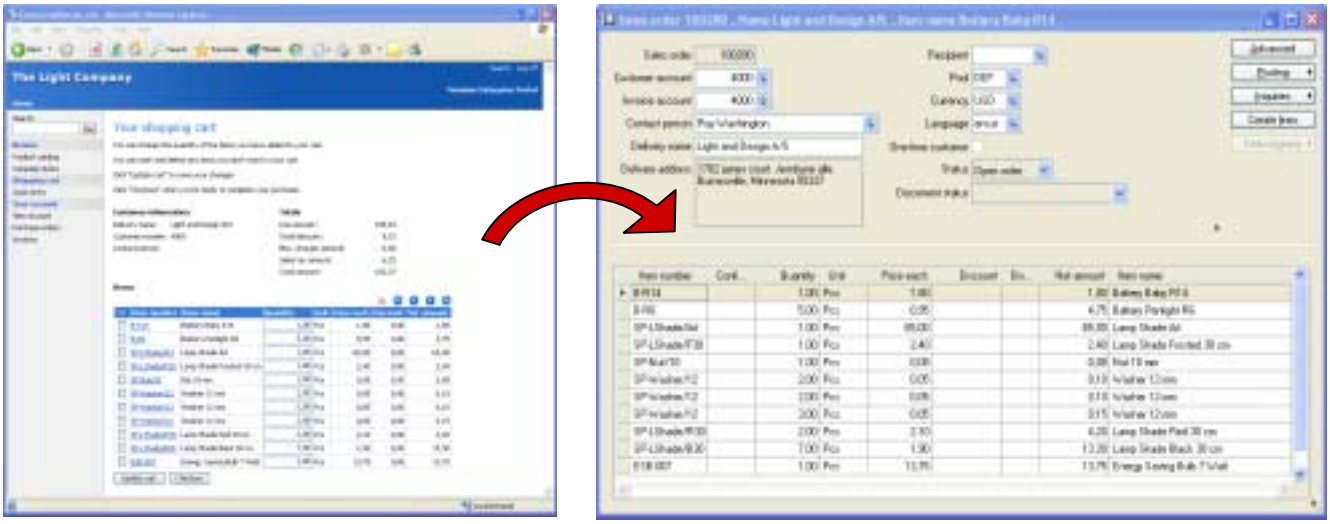
Information such as drawings and orders can be exchanged and published within your parent company and among subsidiaries. No additional software or hardware is required. No longer will the production staff go searching through emails trying to locate the latest document drawing. The latest version is published on the Internet and accessible to everyone involved.

Axapta Enterprise Portal serves as the single point of entry so that there is no flipping back and forth from various programs, the Intranet, Extranet and the ERP system. Once signed on to the network, you do not have to worry about remembering a username and password. You are automatically authenticated and given direct access to the relevant information.

By sharing data and putting it to work, your business community plays a more active role in business. They are empowered to work more effectively on an individual basis due to the high level of personalization of the websites. At the same time, the energy of the online network and visibility of responsibilities makes for better collaboration.

Automation

Speed and efficiency are cornerstones to improving collaboration. For example, when a customer on the other side of the world enters a purchase order on their customer website, that information is registered immediately in Axapta – eliminating your need to enter it manually. The purchase order is published instantly on the personal websites of anyone who needs to know about the transaction. They can then take the necessary actions whether they are a member of the production staff checking availability and placing a new order with a sub-supplier or an accountant issuing a new balance statement.



Customer places order and it automatically registers throughout Axapta

Overall, you have better planning possibilities and the overall efficiency of your business increases. Because you have greater flexibility, Axapta Enterprise Portal makes it easier to find new trading partners and to meet the changing needs of existing partners - regardless of the industry they are in, the programs they use, or the standards they require.

System to system

You have the ability to eliminate all manual entry of data by incorporating Axapta Commerce Gateway, a business-to-business solution. With Axapta Commerce Gateway you can exchange electronic documents with any company, whatever their system – quickly. For example, you produce CDs for resale. You can connect with a customer's ERP system so that an order can automatically be sent when the stock level reaches a certain level, such as 50 CDs. The order is sent directly from the customer's system to your Axapta system without any manual entry or employee interaction what so ever. Your system notifies the warehouse as well as accounting and sales that the interaction has taken place.

Axapta Commerce Gateway is easy to use and expand because it employs Microsoft BizTalk technology, which is based on the industry-standard eXtensible Markup Language (XML). Sending and receiving purchase orders and sales orders electronically reduces the amount of manual work, cuts down on response times and eliminates the possibility of human error caused by manual re-entry of business data.

A personal approach to collaboration

All of the knowledge sharing and interaction with Axapta Enterprise Portal takes place via personalized, role-based websites. Roles relate to specific groups of internal and external users and are aligned with specific tasks and information or service needs. They are designed in terms of goals, not tasks and are inspired by the focus on user experience. The role-based views enable you to access the exact information that you need – and nothing more.

You have immediate access to the exact information you require and it is organized according to your personal preferences. Each role contains links to relevant documents, Websites, discussion forums, and Axapta functionality as well as shortcuts to tasks and storage spaces for frequently used documents. Each person can have one or several roles depending on his or her needs. The result is increased productivity and greater work satisfaction.

You can personalize your website by moving or hiding elements. There is a personalize button at the top of every page which allows you to go in and turn elements on and off, move them up or down and select a number of columns, colors and text preferences.

Vendors and customers can choose names for items, projects and documents based on their needs or way of operating. For example, the item number in your system can be different than the item number used by a customer. A vendor can also use a different item number for the same item. All three refer to the same item and are automatically updated when a change occurs.

A “Favorites” and “My Frequent Tasks” section on the website gives you an instant overview and access to your most commonly used objects and tasks. The portal automatically tracks the activity on each website then lists the tasks and objects beginning with those most frequently used. For a sales representative, a key customer account might be listed first.

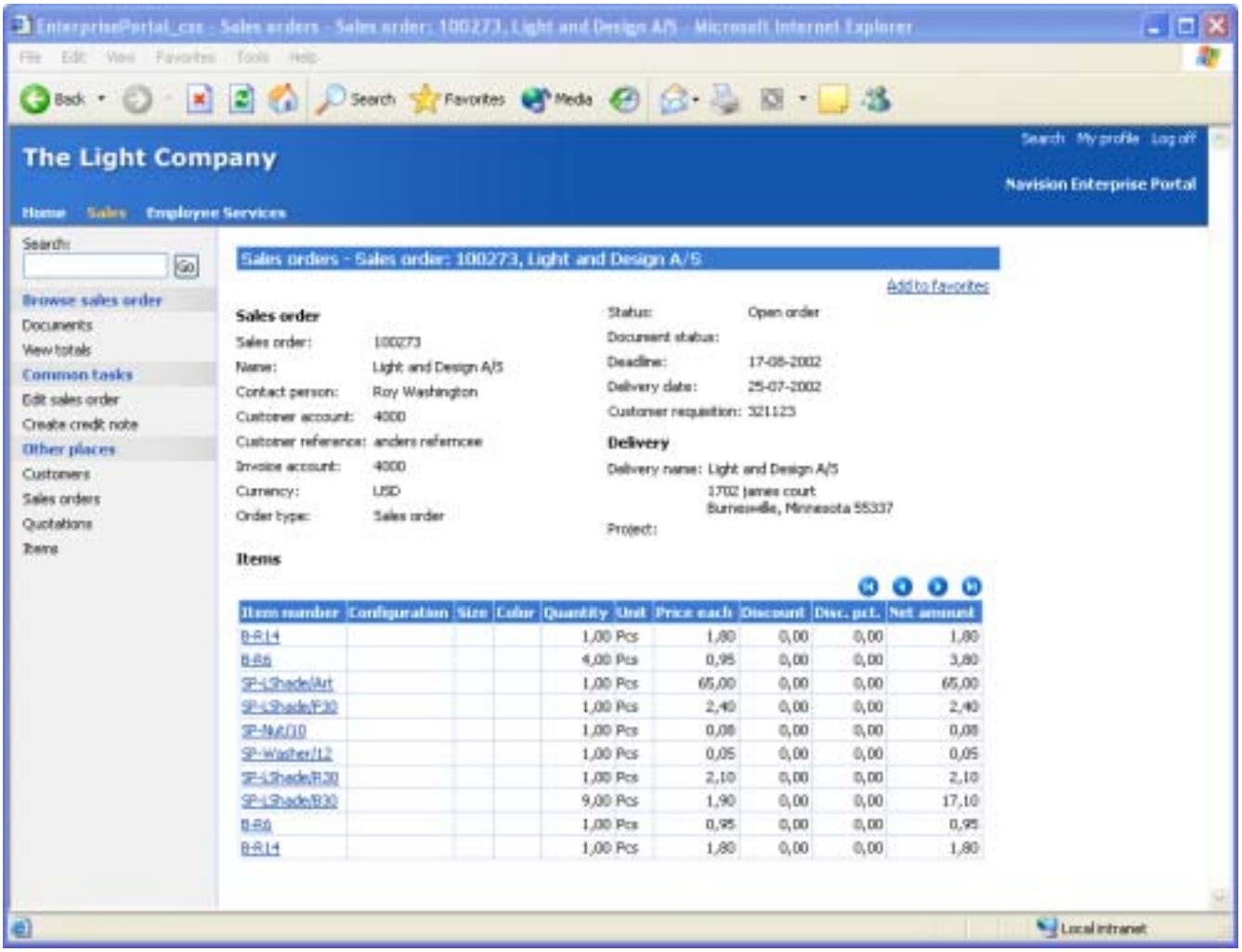
Your employees

Axapta Enterprise Portal supports your employees so that they can in turn support your business. Whether they sit down the hall, in a different department, subsidiary or country – all of your employees will be connected online in a virtual community better prepared to take your business forward.

When your employees log on to their personalized websites, they have all of the information and services they need to participate in relevant tasks and decisions making for better productivity. Using the website, they self-administer personal information such as contact details, absences and résumé information. This ensures accuracy and reduces the strain on Human Resources performing these tasks centrally. Performance reviews, development plans and course registration can be published, viewed and updated online as well as corporate news, information and organizational charts.

Managers have timely employee information immediately available to use in improved employee interactions, skills gap analysis and for numerous activities involving promotion, hiring and termination. Absence approval is done online as well as tabulation of absence statistics. The result is better management support and improved planning.

The personalized employee websites are a virtual workspace that travels with the employee – in essence it is work on the move. Whether working from the office, at home or on the road, business is only a click away.



Account manager views customer's orders on website

Your sales representatives

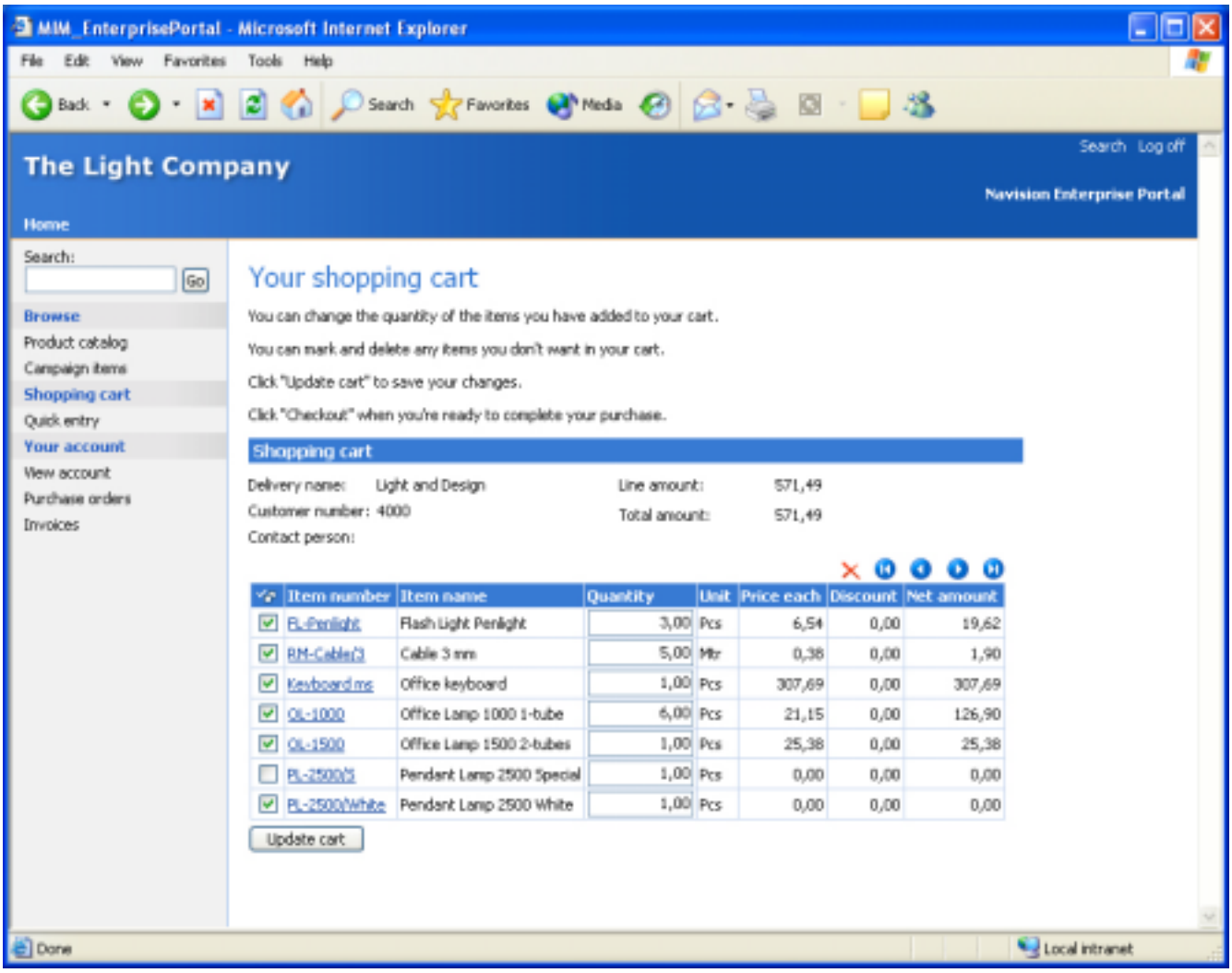
Axapta Enterprise Portal enhances your sales team's workflow and output with direct access to key information and new services. A complete customer overview for each stage of the sales process is on hand. They can view the customer's key contacts, purchases, payment history and outstanding service requests. Based on the information, your sales team can identify new opportunities for additional sales and new campaign strategies. As a virtual sales team, it is easier to share leads, contacts and competitor insight with colleagues. The enhanced interaction and contact extends to customers. Campaign material, product collateral and special offers can be sent to customers and prospects by email directly from the portal. Polls can be conducted on customer websites to gain market knowledge with next to no cost involved. For deeper and more structured information gathering, Axapta Questionnaire can be involved.

Sales representatives can also create, edit and send quotations, sales orders and credit notes. Used with Axapta Product Builder and Axapta Logistics, a sales member can use Axapta Enterprise Portal to configure products on the Internet. He or she can generate an item based on a customer's unique needs and supply accurate quotations and delivery dates at the bargaining table.

Sales representatives, as well as managers, can also benefit from creating and viewing various reports in text as well as graphical formats. All of the timely sales information generated by frequent portal use is invaluable to sales and market analysis. Reports may include sales by week, month, quarter and year, sales by region or by customer, sales by person, Top 100 (by revenue and margin) and sales forecasts.

Your customers

The one stop connectivity delivered by Axapta Enterprise Portal increases your awareness and understanding of customer needs and at the same time provides them with improved service. Information from each personalized, customer website is shared throughout Axapta including the Axapta CRM and Axapta Supply Chain Management functionality. Both



Customer places order on website

you and your customer know that data such as product availability and contact details is up-to-date and corresponding.

Customers can browse online catalogs which are personalized to each account and include descriptions as well as graphical and photo illustrations. To ensure better planning all around, a customer can see if an item is available and when it can be delivered. Ordering is simple because it is based on the shopping cart concept. Customers place items in the shopping cart as they browse the catalog. They also have the option to submit electronic drawings for items not included in the catalog. The purchase is finalized once the customer creates and submits the sales order. A confirmation can be sent automatically so that the customer knows the order has been received and that there is no need to follow-up.
Prospects also have the option to sign in as guests allowing them to browse product catalogs and company information without placing an order. They can then register an online request to become a customer.

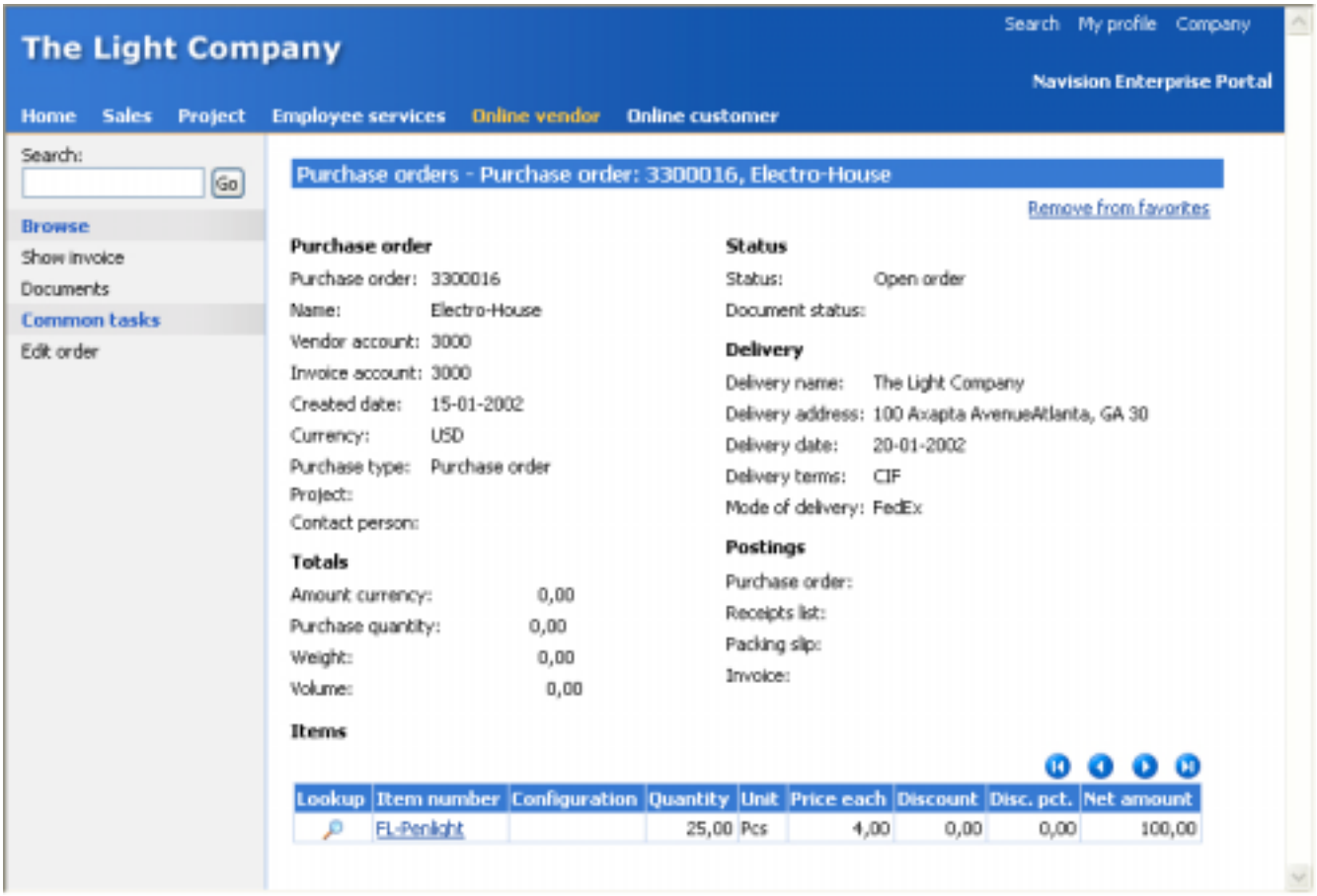
All of the information generated by the interaction on the website is available to you for further analysis. Used with Axapta Business Analysis, management, sales and marketing staff can analyze statistics along a number of dimensions. They can analyze revenue potential, develop strategies to retain preferred customers and attract new customers and create customer profiles and segmentation analysis. They can share up to the minute information such as customer purchasing and supplier inventory, and identify weak spots in the supply chain so that you can make the necessary changes.

Your vendors

Axapta Enterprise Portal improves helps you improve visibility into your business operations while improving your relationships with your vendors. It gives you and your vendors a shared and accurate overview of data, such as purchase orders, discounts and delivery dates and strengthens the platform for collaboration and new ways of monitoring supply chain performance.

Axapta Enterprise Portal, you can optimize your supply chain in a short amount of time providing both you and your vendors with financial gain. Sharing and exchanging data via the websites cuts down on phone calls, faxes, emails and errors. You can instantly view averages concerning on-time deliveries, late deliveries and lead times as well as back orders.

Vendors maintain and update their own contact information, prices and discounts via their personalized websites. When a vendor updates information, it is automatically updated throughout Axapta. For example, a change in price on a vendor website is generated in the standard price list found in the Axapta Financials module so that there is no



Vendor views purchase order on website

inconsistency between the expected price and actual price. Likewise, if a vendor changes the shipping address or delivery date, they are also registered automatically. You can be notified instantly by email or view the change on your website and take the necessary action.

There are new opportunities for you to communicate to your vendors as well. For example, if you use Axapta Master Planning for forecasting and ordering, you receive suggestions for items to hold on stock and can pass them on to your vendors. This can result in better prices because your suppliers have enough notice to reduce their own stocks. You can send the supplier an electronic order straight from Navision Axapta for each production cycle so they have as much advance notice as possible.

Vendors cannot alter your internal information but they have the option to attach documents to item information and purchase orders. The kinds of documents may include fact sheets, contracts, drawings or promotional information.

Your consultants

Axapta Enterprise Portal simplifies hour registration and information sharing for consultants or external partners who do not have direct access to Axapta and for employees who are working on a project basis.

Work hours are logged via the Internet based on flexible time registration options so that it doesn't matter what country or what project the consultant is working on, registration is simple and direct. Consultants can also submit and share information such as agreements using Axapta Enterprise Portal or view invoices, proposals and hour, cost, revenue, item information.

Project managers can view timesheets and compare budgeted project hours to actual hours spent. It is easier to monitor a project status or to assess and plan future projects. The time data can be used and generated in invoices and reports throughout Axapta.

Main features in brief

Content management

When information is moving fast over the Internet and there are a lot of people involved, it is important that you have a system that can manage it. Axapta Enterprise Portal ensures that all of the content published and exchanged is centralized by a set of rules, processes and workflows so that it conforms to a standardized infrastructure. Everyone creating, editing, managing and publishing the content automatically works within the framework. Content management ensures that there is consistency in information creation, that everyone who needs access to specific information has the same version and that documents do not get lost in the maze of emails, file folders, drives and databases.

External content and services

Axapta uses Microsoft Web Parts technology, which means that any Web parts deployed under Microsoft Web Parts technology can be embedded in Navision Axapta Enterprise Portal. That can include access to programs such as Microsoft Outlook including the personal calendar, general news, stock and weather information as well as information from other ERP systems. It is also possible to integrate with other third party back-end systems because the framework supports the use of ActiveX controls, COM and XML throughout Axapta.

Multilanguage and multicurrency support

Everyone logging on to Axapta Enterprise Portal has the ability to choose from 23 languages and local currencies. Employees around the globe can work comfortably in one system while customers and vendors can view item information, monitor shipping status and make requests in their native language. Also, managers, sales representatives and accountants can choose to view reports and forecasts in a national currency as well as a secondary currency such as the euro.

Walk-up usage

The consistent and easy to navigate layout throughout Axapta Enterprise Portal translates to little or no training. The interface and navigation follow all common Web browser standards – menu bar, click functionality, GUI interface – which means that users are able to navigate the portal as soon as they log on. Searches are performed in the same manner as the Internet, all hyperlinks are underlined and blue and users can bookmark pages of the Axapta Enterprise Portal just like any other Internet page.

Guidance all the way

When logged on to Axapta Enterprise Portal, you are guided through work processes in a step-by-step tunnel process. It is conceived as a tunnel process because it is virtually impossible to go in the wrong direction. The tunnel process ensures that tasks are simple and that users are less likely to make errors. For example, customers are guided through the process of creating a sales order. The necessary information appears as each step is completed and the user moves on – from the first "Create a sales order" click through to "Pick items" and "See total." The user does not need to wonder if the system has all of the information because it asks all the questions and the user simply types in the answers. The order is complete once the "Finish" button is clicked on. Detailed online help is available on every page.

Immediate connectivity

Axapta Enterprise Portal websites are fast and easy to implement. You do not need web programming, HTML or Active Server Pages (ASP) knowledge to set up or maintain a website. Nor do you need external web development tools, a consultant or an expensive upgrade. Everything you need to create a website is available the moment the license key is entered into your Axapta installation.

Security/Discretion assured

Security is ensured with assigned access rights and the Record Level Security throughout Axapta. Everyone has an individual login ID, login name and password. No one can access someone else's website or information due to the role level security. For further security settings, you can refer to the SSL (Secure Socket Layer) on the websites.

Setup and administration with Navision Axapta Website Wizard

The websites are deployed on a Microsoft Internet Information Server (IIS). The website wizard guides you through the simple steps required to put the website to work. These steps include:

- Choose "Enterprise Portal" and enter a name for your site from within the website administrator form.
- Enter the name of the web server you will use to deploy your site.

- Enter the name of the directory where you wish to install the application.
- Click on the setup button to select your website's language, layout theme and other style properties.
- Click on the finish button to activate files for your site.

Once these steps are completed, the website is ready for use.

Design options

Axapta provides a number of options for creating a customized website to suit your individual needs. These tools include style sheets, images and pre-built graphical themes, plus a built-in web page editor that allows you to design your website from scratch.

Axapta includes cascading style sheets that make it easy to define and maintain a consistent look throughout a website. Style sheets allow you to separate graphical design from content so that each can be maintained with a great degree of flexibility.

Axapta also includes a range of graphical themes for controlling the visual appearance of web pages. Each theme consists of a set of style sheets and images which make it easy to change the site design quickly.

Built for connectivity

Axapta is built around the premise that the Internet is a natural part of the development environment, and thereby your ERP system. That is why you are able to reach out to your business community quickly and without an expensive upgrade or extra tools. The extent you want to reach out is up to you. The three-tier architecture provides scalability and accommodates a large number of simultaneous users and transactions, as well as the ability to expand geographically. With Axapta, you are also prepared for emerging technologies, such as mobile solutions and PDA, as their role in collaboration increases.

Contact your partner

To learn more about Microsoft Navision Axapta, contact your local Navision Solution Center. They have the expertise necessary to meet your specific business needs.

About Microsoft Business Solutions

Microsoft Business Solutions, which includes the businesses of Great Plains®, Microsoft bCentral™ and Navision a/s, offers a wide range of business applications designed to help small and midmarket businesses become more connected with customers, employees, partners and suppliers. Microsoft Business Solutions' applications automate end-to-end business processes across financials, distribution, project accounting, electronic commerce, human resources and payroll, manufacturing, supply chain management, business intelligence, sales and marketing management, and customer service and support. More information about Microsoft Business Solutions can be found at:

http://www.microsoft.com/BusinessSolutions

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Data Summary Sheet

Key Features	Description
Enterprise Portal Platform	• Designed for "Walk-up" usage – no training of users needed • Integrated user assistance and guided tasks • True HTML Client interface • Real-time data and business logic • Fully customizable and extendable with built-in tools • Rapid deployment using website wizard • Multiple languages and currencies • Single Sign-on: Users on network can be automatically authenticated • Data Crawler builds searchable Full Text Index, that's allows you to search any Back office data • Quick access to most recently used Tasks and Data • Category browsing allows easy drilldown in business data • Access to Microsoft Exchange information: Tasks, Calendar without the need for plug-ins or ActiveX • Fully personalized front page and Activity centers • Incorporate content from information sources and other back office and front office systems using WebParts
Content Management	• Freely define topics for content management • Subscription feature • Online editing and publishing of articles • Online administration of topics • Proofreading & Moderation support • Attach Documents • Discussion forums
Sales Representative Role	• See Microsoft Navision Axapta Enterprise Portal – Sales Representative Role fact sheet
Employee Role	• See Microsoft Navision Axapta Enterprise Portal – Employee Role fact sheet
Consultant Role	• See Microsoft Navision Axapta Enterprise Portal – Consultant Role fact sheet
Customer Role	• See Microsoft Navision Axapta Enterprise Portal – Customer Role fact sheet
Vendor Role	• See Microsoft Navision Axapta Enterprise Portal – Vendor Role fact s

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System Requirements

To obtain all of the features mentioned in this fact sheet, the following modules and technologies are required:

- Microsoft Navision Axapta 3.0
- Microsoft Navision Axapta Trade Series
- Microsoft Navision Axapta Logistics Series
- Microsoft Navision Axapta Trade Agreements
- Microsoft Navision Axapta Enterprise Portal Framework
- Microsoft Navision Axapta Enterprise Portal – Customer Role
- Microsoft Navision Axapta Enterprise Portal – Employee Role
- Microsoft Navision Axapta Enterprise Portal – Sales Representative Role
- Microsoft Navision Axapta Enterprise Portal – Consultant Role
- Microsoft Navision Axapta Enterprise Portal – Vendor Role
- Employee Development for Enterprise Portal
- Performance Management for Enterprise Portal
- Questionnaire for Enterprise Portal
- Product Builder for Enterprise Portal
- Customer Relationship Management for Enterprise Portal
- Microsoft Internet Information Server