



PROFESSIONAL SERVICES TOOLS AND TECHNOLOGY FOR MICROSOFT DYNAMICS 365 FINANCE

An Enhanced Dynamics 365 Framework for **Services and Project-Driven Companies**

AXIO Advanced Projects is a packaged solution from Velosio for Dynamics 365 Finance that transforms your ERP into a quote-to-cash powerhouse.

The AXIO enhanced framework is available as a monthly subscription from Velosio that accelerates planning, reduces services costs and preserves the value of your investment over the entire solution lifecycle.

Companies with AXIO Advanced Projects start their Dynamics 365 journey with a working financial and project accounting system on day one, so design efforts are focused entirely on elements that are truly unique to their business. Better adherence to industry best practices and workflow tested by hundreds of companies leads to higher employee adoption, faster onboarding and a reduction in total cost of ownership by 30% of more.



Modernize Processes

Hundreds of business processes designed for the cloud and grounded in proven best practices for a better user experience.

Mitigate Risk

Pre-configuration of financial, project accounting and project management components allows for easier customization without sacrificing security or performance.

Move Faster

AXIO not only includes Dynamics 365 upgrades twice per year, but eases preparation with regression testing models to eliminate operational disruption.

Maximize Outcomes

Embedded learning path content and exclusive features enhance the experience throughout the entire life of your deployment.



Move Forward with Confidence

Lower your risk and optimize the performance of your most important systems throughout the entire solution lifecycle.

Modern Best Processes Built Right in.

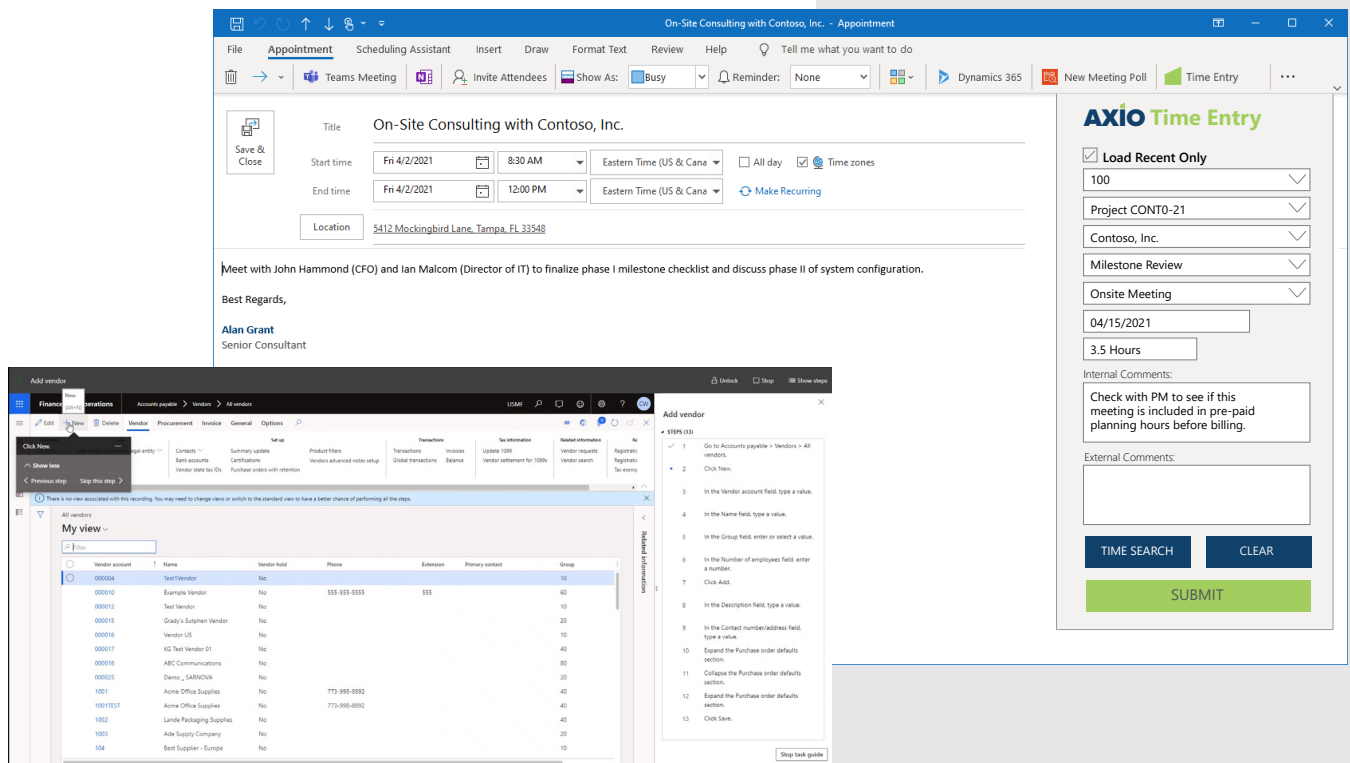
A state-of-the-art financial system for a large enterprise is about more than leveraging new technology to better automate existing processes. In fact, most companies spend up to 40% of their implementation effort re-thinking outdated processes, documenting changes, and configuring them in the new system.

AXIO comes with over 500 must-have processes grounded in best practices and garnered from thousands of deployments with companies like yours.

AXIO Best Processes are provisioned directly through Dynamics 365 Finance using LCS (*Dynamics Lifecycle Services*) to create a simple, unified user experience. Fully integrated multi-media guided help and auto-configuration of integrated “Learning Paths” streamline new user onboarding and ongoing training.

Where most ERP deployments tend to decrease in value over time due to fading process governance, AXIO preserves system value even when facing staff attrition or formal training gaps.

- Simplified User Experience
- High Adoption and Process Governance
- Regression Testing Models
- Higher Adoption and Easier Employee Onboarding
- Alignment to Best Practices

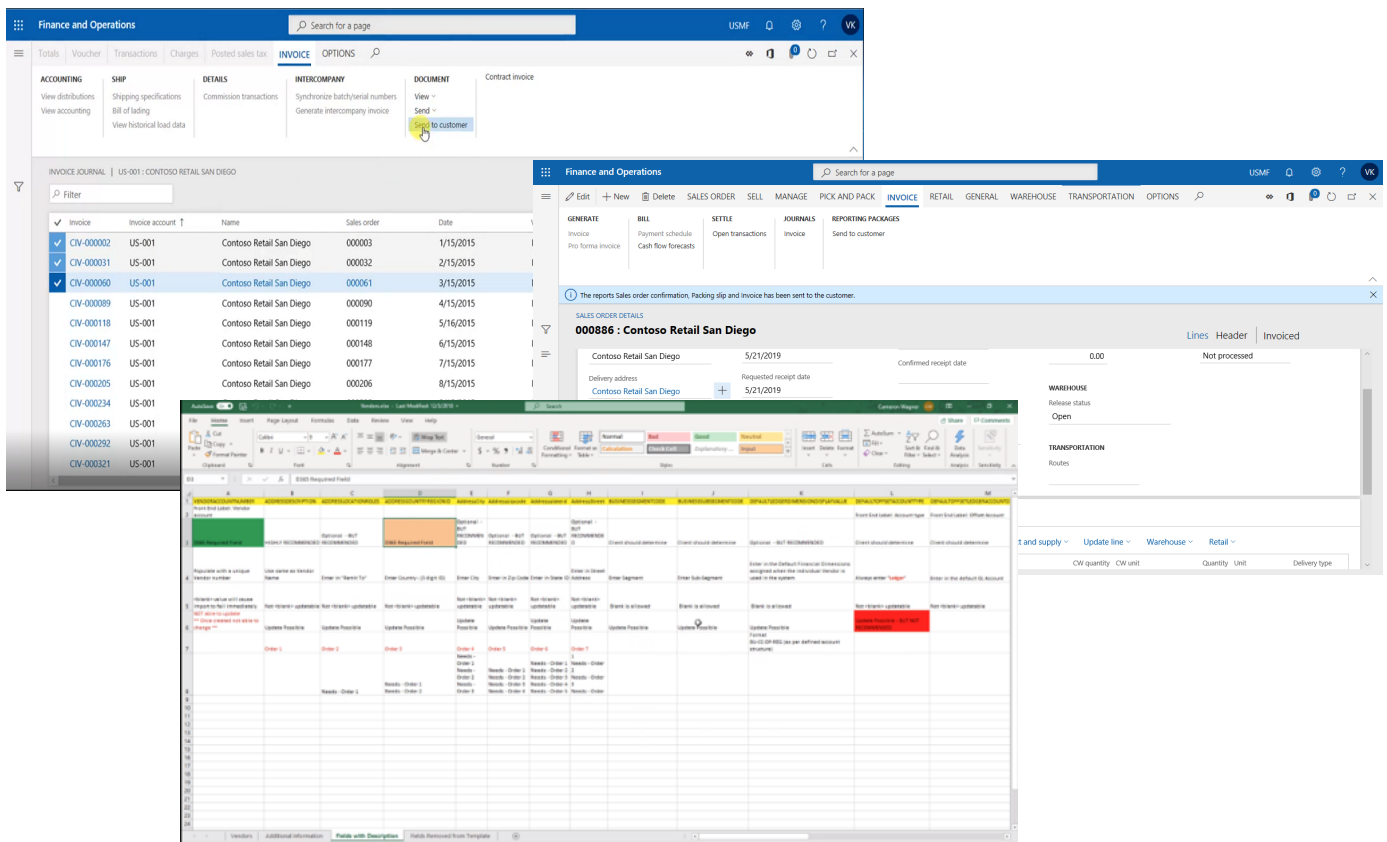


A Functioning Finance and Projects System on Day One

Configuration of a new financial system, even one as comprehensive as Dynamics 365 Finance is an enormous undertaking. Creating a new chart of accounts alone can take a great deal of time for companies with multiple entities, multi-currency, multi-taxation or multi-language requirements. That's why more than half of financials deployments end up over scope, over budget or both.

AXIO deployments are fundamentally different than traditional implementations because you start with a flexible, working financial system tested across hundreds of implementations. This includes dozens of module enhancements and added functionality that most clients pay to develop as one-off customizations. Instead of wasting time building from the ground up, the focus is on tailoring only the components that are truly unique to your business.

Even more importantly, these enhancements are updated by Velosio and applied twice per year along with standard updates to save you time and money. AXIO regression testing packages (RSAT) streamline preparation for system updates, simplify performance analysis and lower your risk.



Start Right, Move Fast and Preserve System Value.

To often, decisions are made early in scope and configuration that have dramatic affects on system performance, cost and support requirements down the road.

AXIO helps our clients to simplify implementation and focus on the most important decisions from the very beginning. Our Process Data Packages (import templates), pre-configured modules and process library remove unnecessary costs and dramatically accelerate your implementation.

Combine a solid start with included updates, usability and features that are automatically updated as your system evolves, and you have a formula that underpins success throughout the life of your investment.

Accelerated implementation, streamlined support and a better user experience are why AXIO is able to boast as much as a 50% decrease in TCO (total cost of ownership) for Dynamics 365 Finance clients.

- **Reduced Stress;
Increased Confidence**
- **Reduction of
Implementation Cost**
- **Lower Total Cost of
Ownership (TCO)**
- **Decreased Risk, Fewer
Errors**
- **Faster Time to Value,
Accelerated
Implementation**



Feature Rich and Fit for Today's Enterprise

AXIO spans all the important financials work across your company, including AR, AP, GL, Fixed Assets, Banking and another dozen workloads to give you unparalleled insight and control. Along with a working financial system and process library comes pre-built reporting and analytics, alerts, and an array of enhancements to simplify the management of your Dynamics 365 Finance environment.

AXIO features and pre-configurations are not just designed to make the system work better. They're designed to help your employees work better and create a user experience that exceeds expectations at every turn.



AXIO Contract Lifecycle Management

AXIO Contract Lifecycle Management significantly extends base functionality of Dynamics 365 to simplify contract administration, including changes to billing, milestones or payment schedules.



AXIO Advanced Revenue Management

Provides automation and support for multiple revenue streams and schedules down to the contract level with full support for ASC 606 compliance.



AXIO Visual Scheduling

AXIO Visual Scheduling adds Gantt chart control of projects along with visual scheduling native to Dynamics 365 Finance.



AXIO Outlook Time Entry

Allows consultants to manage and record time directly from their Outlook calendar with integration to D365 Projects



AXIO Project Email Notification App

The Project Email Notification App enhances project management through automated email notifications to project stakeholders. Automated email notifications are sent to stakeholders as specific activities are performed, like adding a new resource to a project or when project hours are allocated to the resource or reduced.



AXIO Expense Report Integration App

The Expense Report Integration App helps customers who maintain expense reports data in third party applications to integrate that data with Dynamics 365 for Finance for financial implications. Once in Microsoft Dynamics 365 Finance, completed expense reports are imported or open expense reports can go through approvals prior to payment.





AXIO eBanking

Secure connection to banking systems, native to the Microsoft Cloud, for electronic funds transfer (ACH), positive pay, and automated bank reconciliation



AXIO Payroll Integration

AXIO provides out-of-the-box integration with all major payroll systems, native to the Microsoft Cloud, including ADP, Ceridian, and Ultipro.



AXIO Integration Engine

AXIO's integration engine supplements Dataverse (Microsoft common data service), leveraging Odata connectors enabling simple, secure integration to transactional data and any and other data in Dynamics 365 Finance that is not natively connected to Dataverse.



AXIO Dashboards and KPIs

Enhanced Financial Dashboards built with PowerBI and embedded in Dynamics 365 for better, more consistent operational visibility



AXIO Customer Invoice Email App

In standard Microsoft Dynamics 365 Finance & Operation, to get an invoice to a customer, a user must manually print the customer invoice, save the invoice to their PC, find the saved file and then share it via email to the customer, which is a time-consuming and tedious task. With the Customer Invoice Email App, an automated process is in place to email customer invoices when the sales order invoice is posted.



AXIO Landed Cost Enhancement

Define landed cost destination and rates to add to purchase entries. When PO is entered and destination is selected, a freight entry is automatically created.



AXIO Customer Invoice & Related Documents App

Improves customer invoicing process through automated process added to email customer invoices when sales order invoice is posted.



AXIO Sales Order & Purchasing Barcode App

Manage inflow and outflow of inventory in the warehouse; Print Sales Orders and Purchase Order reports with Barcodes. Warehouse user can scan sales order and respective items through RF scanner or mobile devices while picking and packing sales items. Receiving can simply scan the Purchase Order and receive the items on the PO, eliminating the need to manually enter data.



AXIO Sales and Purchasing Reports Email App

Manage customer and vendor queries and share sales-related reports at the click of a button. Send multiple reports to a customer or vendor with a single click of a button without manual intervention. Automated email sent to the customer's or vendor's point of contact email id, as defined in the master record. Reports are printed in a pdf format, zipped together and automatically emailed to the specified customer or vendor.



AXIO Email Address Enhancement App

The Email Address Enhancer App adds flexibility and personalization to email automation, including setup of multiple user email addresses. When automated emails are generated, users select their specific email address, so emails come from a person, not a generic "admin" account. Save time by letting recipients know you sent the email so they can to the appropriate person if additional action is needed.

Velosio Maintains the Apps, Not You.

Many of these apps can be produced as one-off customizations during implementation, but would result additional up-front planning and development costs. As part of the AXIO suite, not only do you forgo these costs, but any troubleshooting, version updates and future maintenance costs are already included.

AXIO ADVANCED
PROJECTS

AXIO

ADVANCED PROJECTS

Discover how AXIO can lower risk and optimize Dynamics 365 performance throughout the entire solution lifecycle.

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