



# VOX ISM

## Presenters:

Jim Heaton  
**Host**

David Cameron  
**Financial Expert**

Mike Fontaine  
**Manufacturing Expert**

Presentation: 10/16/18

# MICROSOFT FOR MANUFACTURING

## COST. TRACK. SCHEDULE. REPORT.



Microsoft  
Dynamics 365



170,000+  
Worldwide NAV Customers



7,000+  
Canadian NAV Customers



800+  
Vox ISM Customers



VOX ISM IS A TWO-TIME MICROSOFT  
DYNAMICS WORLDWIDE PARTNER OF  
THE YEAR AWARD WINNER.

Microsoft  
Partner



Gold Customer Relationship Management  
Gold Enterprise Resource Planning

# Agenda for Today -

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**VOX ISM**

- Introduction to Microsoft 2018 Technology, it all works together
- **Welcome Business Central – “Canadian Premier”**
- Microsoft Dynamics 365 ERP & CRM
- Office 365 Integration
- Mobility and Power BI (Business Analytics)
- Cost, Track, and schedule the shop floor
- Tracks both Work Orders & Projects
- Advanced Scheduling
- Real Time Machine and Shop Data Collection
- Accounting
- Distribution
- Business Intelligence and Management Reporting



# Why Microsoft Dynamics & Vox ISM?

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**VOX ISM**

- Microsoft Technology Advantage
- Vox is Microsoft's Manufacturing experts
- Local Support, Industry Expertise
- Twice Microsoft World Wide Partner Of The Year
- COJG Will Pay 83 Cents/Dollar For Your Training





# Dynamics Food Mfg. and Distribution in Ontario **VOX ISM**

## Just Foods Users



## 60+ Ontario Food Mfg. & Distribution



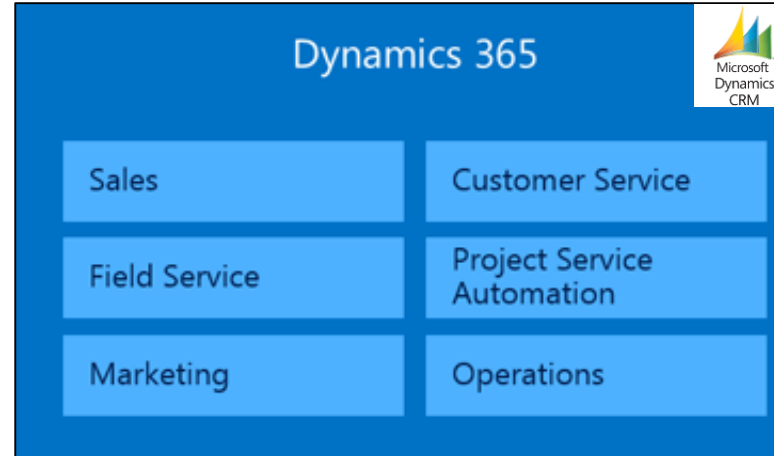
# Microsoft Manufacturing Software 2018

# VOX ISM

## Microsoft Dynamics NAV



## Microsoft Dynamics CRM



## Microsoft APP Source

### Vox ISM Vertical Accelerator

helps organizations implement integrated solutions more quickly based on common industry configuration decisions. They are designed to deliver core industry application processes, reduce implementation times, costs and risks, for customers in specific vertical industries.

### Dynamics 365 Business Central

Connect your financials, sales, service, and operations with an all-in-one business management solution. Easily tailor and extend the application to meet your business or industry-specific needs.

## Microsoft Office 365



## The Power Of Choice



Cloud, on premise software, or a combination



# The End Result

# VOX ISM



# 28 Role Centers – Configurable By Role/Job

# VOX ISM

CRONUS Canada, Inc. | Journals ▾ Worksheets ▾ Product Design ▾ Capacities ▾

Simulated Production Orders | Planned Production Orders | Firm Planned Production Orders | Released Production Orders | Finished Production Orders

ACTIONS

+ Item + Production Order + Production BOM + Routing + Purchase Order > Tasks > Administration > History Capacity

Insights

HEADLINE

## Good Afternoon Mississauga

Excel with Excel Webinar tomorrow!

Activities PRODUCTION ORDERS

- PLANNED PRO... ALL - 0
- FIRM PLAN. PR... ORDERS - ALL 0
- RELEASED PR... ALL - 2

PLANNING - OPE...

MY PURCHASE ORDERS 0

My Items

ITEM NO.	DESCRIPTION
1896-S	ATHENS Desk
1900-S	PARIS Guest Chair, black
1906-S	ATHENS Mobile Pedestal
1908-S	LONDON Swivel Chair, blue
1920-S	ANTWERP Conference Table

- This is a dashboard designed to provide all of the information you need to run your company or department in one place. There are 28 different role centers and they can be configured just for you.
- Day to day activities are presented on colour coded cards to indicate what is a priority or a problem.
- Business metrics are 1 click away.
- Security is easy, if you aren't given access the information just disappears from the screen making it easy to use.

<http://businesscentral.dynamics.com/?runiframe=1>

HOME ACTIONS REPORT ALCOS

New Create To-do Import Send by Email Make Order

My Process

Business Process

# Configuration of Menu

1006 · Progressive Home Furnishings

✕ The customer's credit limit has been exceeded. [Details...](#)

## General

Customer: Progressive Home Furnishings

Contact: Mr. Scott Mitchell

Due Date: 5/1/2018

Requested Delivery Date:

Status: Open

General Information

## Lines

Insert Ext. Text Dimensions Line Functions New Find Filter Clear Filter

Type	No.	Description	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Line Amount Excl. Tax	Amount Including Tax	Line Discount %	Line Discount Amount
Labour									
Resource	DESIGN	Design	100	HR	41.24	4,124.00	4,124.00		0.00
Resource	PROGRAMM	Programming	150	HR	41.24	6,186.00	6,186.00		0.00
							0.00		0.00
Materials									
							0.00		0.00
Resource	5 YEAR WAR...	5 YEAR WARRANTY	1	EA	2,000.00	2,000.00	2,000.00		0.00
Item	02-090703	3313189.04 PWR MOD KT_SZ_L...	1	EA	360,251.00	360,251.00	360,251.00		0.00
	03-090701-C	Digial Thermostate c/f/hs	1	EA	32,012.00	32,012.00	32,012.00		0.00
Item							0.00		0.00

Details



# The Work Order

HOME ACTIONS NAVIGATE REPORT MANAGE FUNCTIONS LINE

Refresh Production Order... Replan... Change Status... Update Unit Cost... Reserve Order Tracking Copy Prod. Order Document...

Create Inventory Put-away/Pick/Movement... Create Inbound Whse. Request Create Whse. Pick Job Card... Mat. Requisition... Shortage List... Print

EDIT - RELEASED PRODUCTION ORDER - RP-000003 - SNC LINERS ASSEMBLY

## RP-000003 · SNC LINERS ASSEMBLY

### General

No. RP-000003

Description SNC LINERS ASSEMBLY

Description 2

Source Type Item

Source No. SNC\_LINERS\_ASSEMBLY

Search Description SNC LINERS ASSEMBLY

Quantity

Due Date

Assigned User ID

Blocked

Last Date Modified



2018-09-03

### Lines

ITEM NO.	DUE DATE	DESCRIPTION	STARTING DATE-TIME	ENDING DATE-TIME	QUANTITY	UNIT OF MEASURE CODE	FINISHED QUANTITY	REMAINING QUANTITY
SNC_LINERS_ASSE	2018-09-03	SNC LINERS ASSEMBLY	2018-08-30 8:00 AM	2018-08-31 4:00 PM	4	PCS	1	3

# Production BOM

# VOX ISM

## SNC LINERS ASSEMBLY · SNC LINERS ASSEMBLY

### General

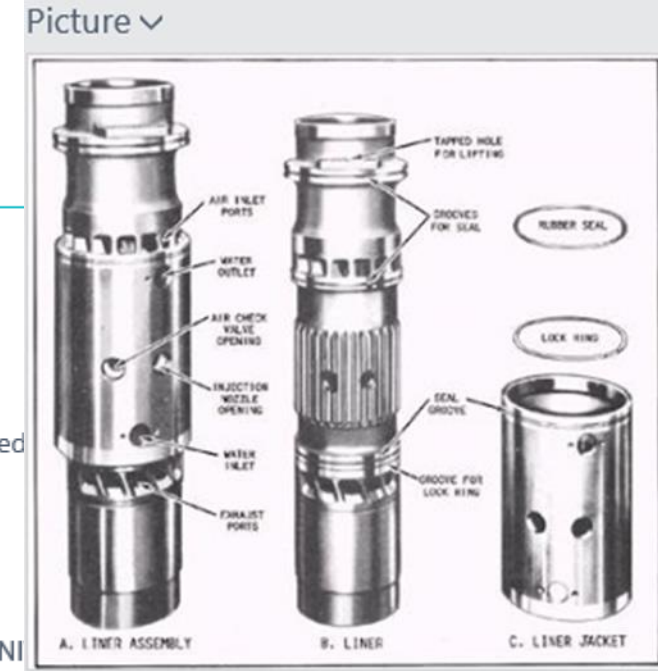
No.	SNC LINERS ASSEMBLY	...
Description	SNC LINERS ASSEMBLY	
Unit of Measure Code	PCS	...
Status	Certified	

Search Name

Version Nos.

Active Version

Last Date Modified



### Lines

TYPE	NO.	DESCRIPTION	QUANTITY PER	UNI
Item	...	LINE_TUBE	1	PCS
Item	...	LOCKING_LUG	1	PCS
Item	...	RIVETS	4	PCS



# Production Routings

## SNC LINERS ASSEMBLY · SNC LINERS ASSEMBLY

### General

No.	<input type="text" value="SNC LINERS ASSEMBLY"/>	...	Search Description
Description	<input type="text" value="SNC LINERS ASSEMBLY"/>		Version Nos.
Type	<input type="text" value="Serial"/>	▼	Active Version
Status	<input type="text" value="Certified"/>	▼	Last Date Modified

### Lines

OPERATI... NO.	TYPE	NO.	DESCRIPTION	SETUPTIME	RUN TIME	WAITTIME	MOVE TIME
010	... Work Centre	100	Assembly	0	1	0	0
020	... Work Centre	200	Packing department	0	1	0	0
030	... Work Centre	300	Painting department	0	2	0	0
040	... Work Centre	400	Machine	0	2	0	0



# Work Order Traveller

## Prod. Order - Components and Routing Lines

2018 September 5.

Page 1

ADMIN

CRONUS Canada, Inc.

Status	No.	Description	Starting Date	Starting Time	Ending Date	Ending Time	Due Date
Released	RP-000003	SNC LINERS ASSEMBLY					
SNC_LINERS_	SNC LINERS ASSEMBLY						
	<b>Quantity</b>	4	18-08-30	8:00:00 AM	18-08-31	4:00:00 PM	18-09-03

Item No.	Description	Quantity per	Unit of Measure Code	Remaining Quantity	Due Date
LINE_TUBE	Line Tube	1	PCS	3	18-08-30
LOCKING_LU	Locking Lug	1	PCS	3	18-08-30
RIVETS	Rivets	4	PCS	12	18-08-30

Operation No.	Type	No.	Description	Starting Date	Starting Time	Ending Date	Ending Time
010	Work Centre	100	Assembly	18-08-30	8:00:00 AM	18-08-30	12:00:00 PM
020	Work Centre	200	Packing departme	18-08-30	12:00:00 PM	18-08-31	8:00:00 AM
030	Work Centre	300	Painting departme	18-08-31	8:00:00 AM	18-08-31	4:00:00 PM
040	Work Centre	400	Machine	18-08-31	4:00:00 PM	18-08-31	4:00:00 PM

# Costing

EDIT - BOM COST SHARES

Item Filter

SNC LINERS\_ASSEMBLY

TYPE	NO.	DESCRIPTION	QTY. PER PARENT	QTY. PER TOP ITEM	QTY. PER BOM LINE	UNIT OF MEASURE CODE	BOM UNIT OF MEASURE CODE	REPLENI... SYSTEM	ROLLED-UP MATERIAL COST	ROLLED-UP CAPACITY COST	TOTAL COST
Item	...	<b>SNC LINERS...</b>									
		<b>SNC LINERS ASSEMBLY</b>	1	1		PCS	PCS	Prod. Order	1,008.00	60.00	1,068.00
Item	...	LINE_TUBE	1	1	1	PCS		Purchase	800.00		800.00
Item	...	LOCKING_LUG	1	1	1	PCS		Purchase	200.00		200.00
Item	...	RIVETS	4	4	4	PCS		Purchase	8.00		8.00
Work Ce...	...	100	1	1		HR		Transfer		15.00	15.00
Work Ce...	...	200	1	1		HR		Transfer		15.00	15.00
Work Ce...	...	300	2	2		HR		Transfer		30.00	30.00
Work Ce...	...	400	0	0		HR		Transfer			

# Serial and Lot Traceability

## EDIT - ITEM TRACING

### GENERAL

Serial No. Filter

 ...

Show Components

Item-tracked Only

Lot No. Filter

 ...

Trace Method

Usage -> Origin

Item Filter

 ...

Serial No.: , Lot No.: , Item: SNC\_LINERS\_ASSEMBLY, Variant: , Trace Method: Usage->Origin, Show Components: Item-tracked Only

DESCRIPTION	SERIAL NO.	LOT NO.	ITEM NO.	ITEM DESCRIPTION	LOCATION CODE	QUANTITY
Released Production Order Output RP-000...	*** SERIAL-000001		SNC_LINERS_ASSE...	SNC LINERS ASSEMBLY	TORONTO	1
Released Production Order Consumption...	*** SN-000001		LINE_TUBE	Line Tube	TORONTO	-1
Purch. Rcpt. Header 107210	*** SN-000001		LINE_TUBE	Line Tube	TORONTO	1
Released Production Order Consumption...	*** SN-000001		LOCKING_LUG	Locking Lug	TORONTO	-1
Purch. Rcpt. Header 107210	*** SN-000001		LOCKING_LUG	Locking Lug	TORONTO	1
Released Production Order Consumption...	***	LOT-000001	RIVETS	Rivets	TORONTO	-4
Purch. Rcpt. Header 107209	***	LOT-000001	RIVETS	Rivets	TORONTO	3,120



## EDIT - PLANNING WORKSHEET

Name

DEFAULT

WARNING	NO.	ACTION MESSAGE	AC... ACTI MES:	ORIGINAL DUE DATE	DUE DATE	STARTING DATE-TIME	ENDING DATE-TIME	DESCRIPTION	ORIGINAL QUANTITY	MPS ORDE	QUANTITY	REF. ORDER TYPE
Attention	...	SNC_LINERS_AS	New	<input type="checkbox"/>	2018-09-01	2018-07-25 12:00 PM	2018-08-31 4:00 PM	SNC LINERS ASSEMBLY		<input checked="" type="checkbox"/>	55	Prod. Order
	...	SNC_LINERS_AS	New	<input checked="" type="checkbox"/>	2018-09-30	2018-09-28 12:00 PM	2018-09-28 4:00 PM	SNC LINERS ASSEMBLY		<input checked="" type="checkbox"/>	1	Prod. Order
Attention	...	SNC_LINERS_AS	New	<input type="checkbox"/>	2018-10-01	2018-08-20 8:00 AM	2018-09-28 4:00 PM	SNC LINERS ASSEMBLY		<input checked="" type="checkbox"/>	60	Prod. Order
	...	SNC_LINERS_AS	New	<input checked="" type="checkbox"/>	2018-11-01	2018-09-20 8:00 AM	2018-10-31 4:00 PM	SNC LINERS ASSEMBLY		<input checked="" type="checkbox"/>	60	Prod. Order
	...	SNC_LINERS_AS	New	<input checked="" type="checkbox"/>	2018-12-01	2018-10-22 8:00 AM	2018-11-30 4:00 PM	SNC LINERS ASSEMBLY		<input checked="" type="checkbox"/>	60	Prod. Order
Emergency	...	LINE_TUBE	New	<input type="checkbox"/>	2018-09-02	2018-09-01 8:00 AM	2018-09-01 4:00 PM	Line Tube		<input type="checkbox"/>	118	Purchase
	...	LINE_TUBE	New	<input checked="" type="checkbox"/>	2018-09-20	2018-09-19 8:00 AM	2018-09-19 4:00 PM	Line Tube		<input type="checkbox"/>	60	Purchase
	...	LINE_TUBE	New	<input checked="" type="checkbox"/>	2018-09-28	2018-09-27 8:00 AM	2018-09-27 4:00 PM	Line Tube		<input type="checkbox"/>	1	Purchase
	...	LINE_TUBE	New	<input checked="" type="checkbox"/>	2018-10-22	2018-10-21 8:00 AM	2018-10-21 4:00 PM	Line Tube		<input type="checkbox"/>	60	Purchase
Emergency	...	LOCKING_LUG	New	<input type="checkbox"/>	2018-09-02	2018-09-01 8:00 AM	2018-09-01 4:00 PM	Locking Lug		<input type="checkbox"/>	118	Purchase
	...	LOCKING_LUG	New	<input checked="" type="checkbox"/>	2018-09-20	2018-09-19 8:00 AM	2018-09-19 4:00 PM	Locking Lug		<input type="checkbox"/>	60	Purchase
	...	LOCKING_LUG	New	<input checked="" type="checkbox"/>	2018-09-28	2018-09-27 8:00 AM	2018-09-27 4:00 PM	Locking Lug		<input type="checkbox"/>	1	Purchase
	...	LOCKING_LUG	New	<input checked="" type="checkbox"/>	2018-10-22	2018-10-21 8:00 AM	2018-10-21 4:00 PM	Locking Lug		<input type="checkbox"/>	60	Purchase

# Purchase Direct to Job

104002 · Lewis Home Furniture

**General**

Buy-from Vendor No.:	40000	Posting Date:	1/23/2014
Vendor:	Lewis Home Furniture	Vendor Invoice No.:	D-304
<b>Buy-from</b>		Posting Description:	Order 104002
Province/State:	ON	Requested Receipt Date:	
Buy-from Country/Region Code:	US	Vendor Shipment No.:	
Contact:	Mr. Barry Potter	Status:	Released
Document Date:	1/23/2014	Drop Shipment:	No

**Lines**

Line Functions Order New Find Filter Clear Filter

Type	No.	Description	Location Code	Quantity	Direct Unit Cost Excl. Tax	Line Amount Excl. Tax	Job No.	Job Task No.
Item	LS-120	Loudspeaker, Black, 120W	WHITE	10	197.00	1,970.00	111AAA	030.200
Item	LS-10PC	Loudspeakers, White for PC	WHITE	22	200.00	4,400.00	111AAA	030.200
Item	79606	Job Component	GREEN	21	200.00	4,200.00	111AAA	030.200

# Manual Time Sheets

HOME ACTIONS NAVIGATE

Delete Submit Reopen Previous Period Next Period Activity Details Copy lines from previous time sheet Create lines from job planning Time Sheet Comments Line Comments Refresh Find

Manage Process Navigate Lines Page

Time Sheet No:  Starting Date:   
 Resource No.:  Ending Date:

Type	Description	Job No.	Job Task No.	Chargeable	13 Mon	14 Tue	15 Wed	16 Thu	17 Fri	18 Sat	19 Sun	Total	Status	Work Type Code	Cause of Absence Code
Job	Billable	FAR-COR	00151	<input checked="" type="checkbox"/>	8			2				10.00	Approved		
Job	Billable	FAR-FOR	00151	<input checked="" type="checkbox"/>		8						8.00	Approved		
Job	Billable	FAR-FOR2	00151	<input checked="" type="checkbox"/>			8					8.00	Approved		
Job	Billable	FAR-TAX	00151	<input checked="" type="checkbox"/>	2			8				10.00	Approved		
Job	Billable	FAR-TAX2	00151	<input checked="" type="checkbox"/>			2		8			10.00	Approved		
Job	Billable	FAR-COR	00151	<input checked="" type="checkbox"/>	8	8	8					24.00	Approved		
Job	Billable	FAR-FOR	00151	<input checked="" type="checkbox"/>				8				8.00	Approved		
Job	Billable	FAR-FOR2	00151	<input checked="" type="checkbox"/>					8			8.00	Approved		



# Shop Floor Time Collection

# VOX ISM

Time Card - TC000045

Activity Description	Document No.	Setup Time	Run Time	Created At												
Production Orders	101004	1	2	10:28 AM												
<table border="1"><tr><td>Line No.</td><td>10000</td><td>Item No.</td><td>90750349F</td></tr><tr><td>Operation No.</td><td>10A</td><td>Description</td><td>CR-V FRONT BUMPER</td></tr><tr><td>Op. Description</td><td>04 - 165 Ton Battenfeld</td><td>Work Center</td><td>04</td></tr></table>					Line No.	10000	Item No.	90750349F	Operation No.	10A	Description	CR-V FRONT BUMPER	Op. Description	04 - 165 Ton Battenfeld	Work Center	04
Line No.	10000	Item No.	90750349F													
Operation No.	10A	Description	CR-V FRONT BUMPER													
Op. Description	04 - 165 Ton Battenfeld	Work Center	04													
Run Time	<input type="text" value="2"/>	Setup Time	<input type="text" value="1"/>													
Job	300030	0	0	10:29 AM												
<table border="1"><tr><td>Job No.</td><td>300030</td><td>Job Description</td><td>Welder control system</td></tr><tr><td>Task No.</td><td>010.100</td><td>Task Description</td><td>Contract</td></tr><tr><td>Planning Line No.</td><td>0</td><td></td><td></td></tr></table>					Job No.	300030	Job Description	Welder control system	Task No.	010.100	Task Description	Contract	Planning Line No.	0		
Job No.	300030	Job Description	Welder control system													
Task No.	010.100	Task Description	Contract													
Planning Line No.	0															
Time	<input type="text" value="0"/>	Complete	<input type="checkbox"/>													

# Time and Attendance Rules

- Designed for multiple shift rotations, meals, breaks, paid break rules and all paperless
- We have a standard rules for applying overtime and shift premiums.
- Grace Periods are used to calculate start and end of shift. Deduct breaks and lunches per shift.

**Edit - Shift Description - 1**

Shift ID: 1      Description: 1st shift

**Clock In\Out Grace Periods**

Min. Before Start of Shift:	5	Min. After End of Shift:	15
Min. After Start of Shift:	5	Between job lag Time:	5
Min. Before End of Shift:	5	Min. Before\After Breaks:	5

Indirect ID: INDIRECT

**Edit - Shift Description Definition**

Shift ID: 1      Period: 2 Week Rotation

**Shift Time Periods**

Shift :	Start	End	Paid	Manual Clock In\Out
Meat:	7:00:00 AM	7:00:00 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Break 1:	12:00:00 PM	12:30:00 PM	<input type="checkbox"/>	<input type="checkbox"/>
Break 2:	10:00:00 AM	10:15:00 AM	<input type="checkbox"/>	<input type="checkbox"/>
Break 3:	3:30:00 PM	3:45:00 PM	<input type="checkbox"/>	<input type="checkbox"/>
Break 3:			<input type="checkbox"/>	<input type="checkbox"/>

Paid Breaks Charge to Indirect:

**Work Shifts**

Code	Description	Start Time	End Time	Brea...	Daily Overtime Threshold	Daily Overtime Code	Weekly Overtime Threshold	Weekly Overtime Code	Weekend Overtime Threshold	Weekend Overtime Code	Weekend is Saturday	Weekend is Sunday
1	1st shift			<input type="checkbox"/>	8	OT	40	PREM	0	DOT	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	2nd shift			<input type="checkbox"/>	8	OT	40	PREM	0	DOT	<input type="checkbox"/>	<input checked="" type="checkbox"/>
DAY	Day shift	09:00:00	17:00:00	<input checked="" type="checkbox"/>	8	REG	40	PREM	0	DOT	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
EVENING	Late Shift	17:00:00	01:00:00	<input checked="" type="checkbox"/>	8	REG	40	PREM	0	DOT	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
EXT. DAY	Day + Overtime	09:00:00	19:00:00	<input checked="" type="checkbox"/>	8	REG	40	PREM	0	DOT	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
NIGHT	Early Shift	01:00:00	09:00:00	<input checked="" type="checkbox"/>	8	REG	40	PREM	0	DOT	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

# Material Barcoding

# VOX ISM

Connects To The Warehouse Management System In Dynamics For Picks, Put-aways, And Shipments In The Warehouse.



# Warehouse Pick

VIEW - REGISTERED PICK - PICK · P\_000001



## Pick · P\_000001

### General

No.	P_000001	Assignment Date	
Whse. Activity No.	PI000001	Assignment Time	
Location Code	TORONTO	Sorting Method	
Registering Date	2018-09-03	No. Printed	0
Assigned User ID			

### Lines

SOURCE DOCUMENT	SOURCE NO.	DUE DATE	ACTIONTYPE	BIN CODE	ITEM NO.	DESCRIPTION	QUANTITY
Prod. Consumption	RP-000003	2018-08-30	Take	RECEIVING	LINE_TUBE	Line Tube	1
Prod. Consumption	RP-000003	2018-08-30	Place	PRODUCTION	LINE_TUBE	Line Tube	1
Prod. Consumption	RP-000003	2018-08-30	Take	RECEIVING	LOCKING_LUG	Locking Lug	1
Prod. Consumption	RP-000003	2018-08-30	Place	PRODUCTION	LOCKING_LUG	Locking Lug	1
Prod. Consumption	RP-000003	2018-08-30	Take	RECEIVING	RIVETS	Rivets	16
Prod. Consumption	RP-000003	2018-08-30	Place	PRODUCTION	RIVETS	Rivets	16

# Warehouse Shipment

VIEW - WAREHOUSE SHIPMENT - SH000001

## SH000001

### General

No.	SH000001	Posting Date
Location Code	TORONTO	Assigned User ID
Zone Code		Assignment Date
Bin Code	SHIPPING	Assignment Time
Document Status		Sorting Method
Status	Open	

### Lines

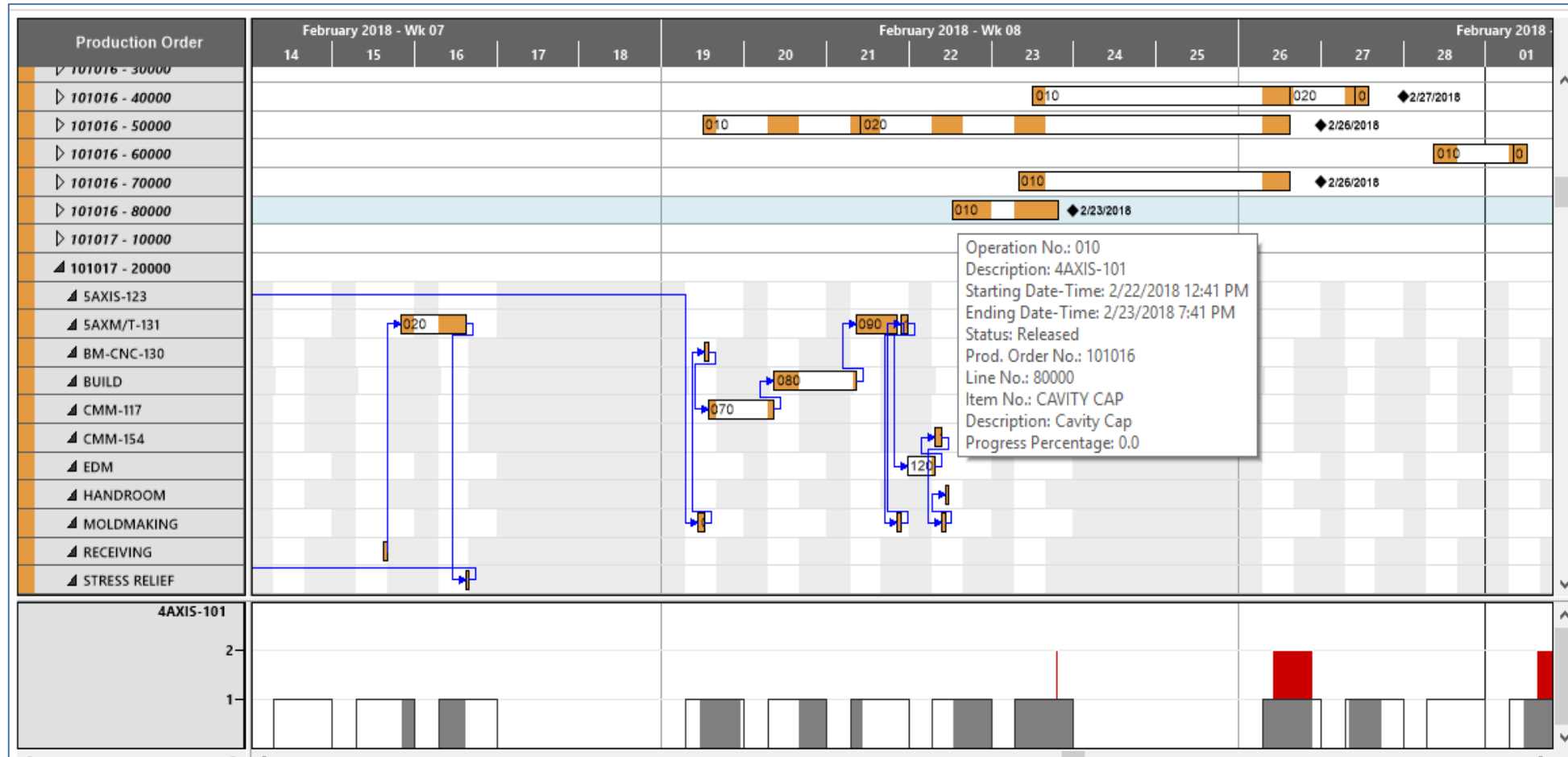
SOURCE DOCUMENT	SOURCE NO.	ITEM NO.	DESCRIPTION	QUANTITY	QTY. TO SHIP	QTY. SHIPPED
Sales Order	...	S-ORD101005	SNC_LINERS_ASS... SNC LINERS ASSEMBLY	4	0	0

### Shipping



# Scheduling At Work Order Level

- This screen shows you the progress and sequence of the tasks of the job. You can identify the job bottlenecks and critical paths and the expected completion date vs the due date.
- You will use this screen with the project managers to determine what customer gets priority, what will ship out this week or month and can you can drill down to find out what is causing the problem and how you can fix it.
- Changing priorities is as simple as drag and dropping.



# Improve Productivity with the Outlook App

# VOX ISM

View Dynamics 365 Financials and CRM data right from Outlook with the Dynamics 365 App for Outlook. Create follow up activities, convert emails directly into leads, opportunities and cases. As well as quickly generate quotes, orders, invoices, and credit memos.

The screenshot displays the Outlook interface with the Dynamics 365 app integrated. The main email content shows a request for additional product units. The Dynamics 365 app window on the right provides a detailed view of the contact and their financial data.

**CRM & Financial Data From Outlook**

**Financials**

10000 · Ableman

Details

42,402.80	40,703.96
Balance (\$)	Past Due
12,569.90	11,066.50
LTD Sales	YTD Sales

Aged Accounts Receivable

Period Length: Week | 1 month overdue

50k

Not Overdue 2W 4W

# Fully Mobile

VOX ISM

Out of the box full deployment on all devices

- Web deployment
- Handhelds
- iPhones
- Androids
- Blackberry
- Windows Phone 8
- Laptops
- Tablets
- No additional costs



# Excel Integration – two way

The screenshot shows the Microsoft Excel interface with the following elements:

- File Name:** Chart of Accounts ADMIN 2016-04-21T14\_17\_14.xlsx - Excel
- User:** Jared Hall
- Active Tab:** Insert
- Table Data:**

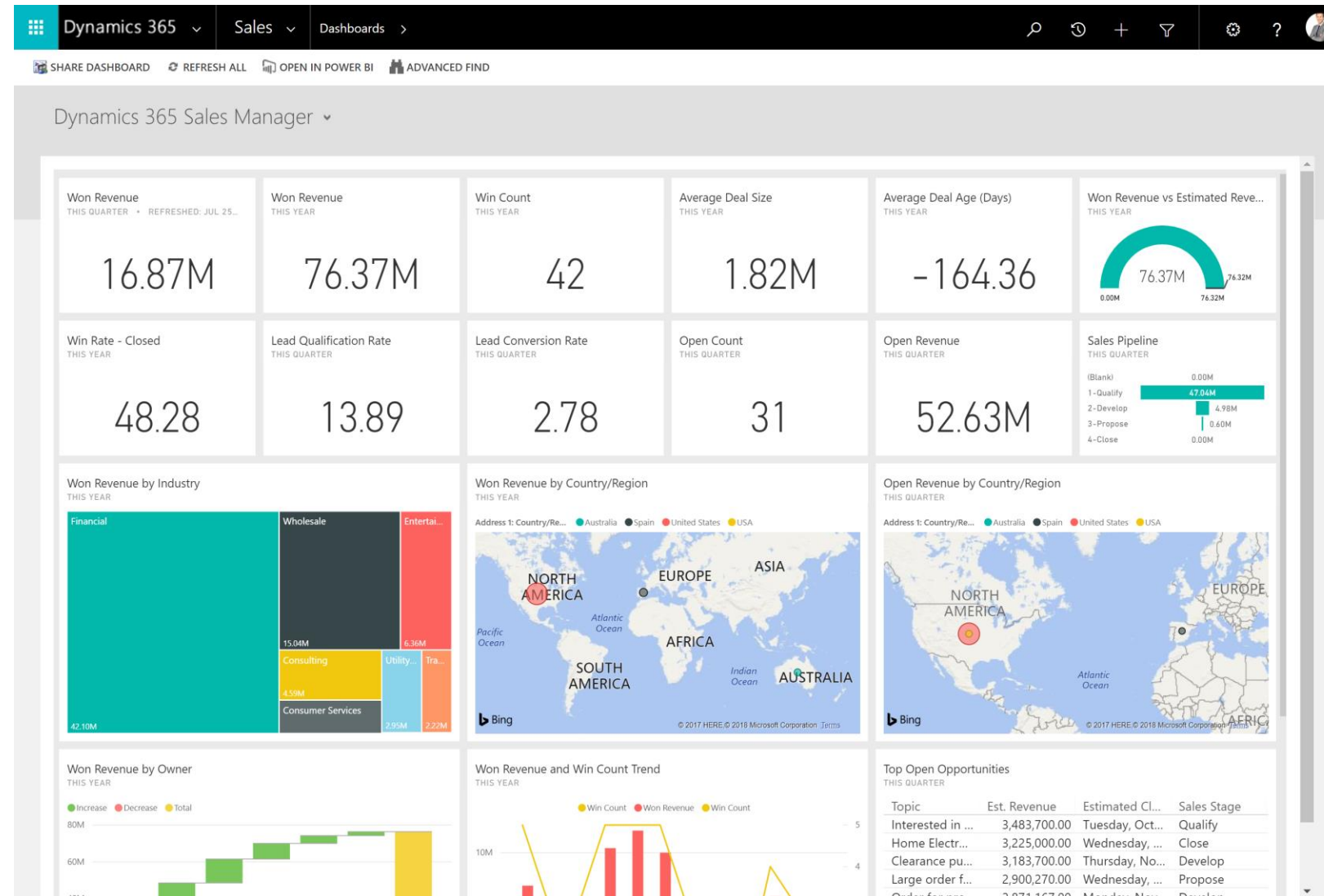
No.	Name	Income/Balance	Account Subcategory	Account Type	Totaling	Gen. Posting Ty
10000	BALANCE SHEET	Balance Sheet		Heading		
10001	ASSETS	Balance Sheet		Begin-Total		
10100	Checking account	Balance Sheet	Cash	Posting		
10200	Saving account	Balance Sheet	Cash	Posting		
10300	Petty Cash	Balance Sheet	Cash	Posting		
10400	Accounts Receivable	Balance Sheet	Accounts Receivable	Posting		
10500	Prepaid Rent	Balance Sheet	Prepaid Expenses	Posting		
10600	Prepaid Insurance	Balance Sheet	Prepaid Expenses	Posting		
10700	Inventory	Balance Sheet	Inventory	Posting		
10750	Services	Balance Sheet	Assets	Posting		
10800	Equipment	Balance Sheet	Equipment	Posting		
10900	Accumulated Depreciation	Balance Sheet	Accumulated Depreciati	Posting		
10990	TOTAL ASSETS	Balance Sheet		End-Total	10001..10990	
20001	LIABILITIES	Balance Sheet		Begin-Total		
20100	Accounts Payable	Balance Sheet	Current Liabilities	Posting		
20200	Purchase Discounts	Balance Sheet	Current Liabilities	Posting		
20300	Purchase Returns & Allowances	Balance Sheet	Current Liabilities	Posting		

**Microsoft Dynamics DATA CONNECTOR**

- + New
- Refresh
- Publish
- Filter
- Design

# Management Reporting (KPI's, BI, AI)

- Business intelligence like never before
- Go from data to insights in minutes.
- Any data, any way, anywhere. And all in one view.





# Accounting: Multi-(Company, Currency, Client, Language)



Navigate your ERP from One Screen  
KPI's and Visual Cues

Integration to CRM, Power BI, Excel and Microsoft Office

Finance, Sales, Purchasing, Inventory, and Project Management

# 1 – There are 282 Standard NAV Reports and Writer



Microsoft Dynamics NAV

EDIT - ACCOUNT SCHEDULE

Name: ANALYSIS

Row No.	Description	Totalling Type	Totalling	Row Type	Amount Type	Show Opposite Sign	Show	Bold	Italic	Underline	New Page
...	<b>ACID-TEST ANALYSIS</b>	Posting Accounts		Net Change	Net Amount	<input type="checkbox"/>	Yes	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...	<b>Current Assets</b>	Posting Accounts		Net Change	Net Amount	<input type="checkbox"/>	Yes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
01	Liquid Assets	Total Accounts	11700	Net Change	Net Amount	<input type="checkbox"/>	Yes	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
02	Securities	Total Accounts	12300	Net Change	Net Amount	<input type="checkbox"/>	Yes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
03	Accounts Receivable	Total Accounts	13400	Net Change	Net Amount	<input type="checkbox"/>	If Any Column Not Zero	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
04	Inventory	Total Accounts	14500	Net Change	Net Amount	<input type="checkbox"/>	Yes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
05	WIP	Total Accounts	15300	Net Change	Net Amount	<input type="checkbox"/>	Yes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
06	<b>Current Assets, Total</b>	Formula	01..05	Net Change	Net Amount	<input type="checkbox"/>	Yes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...	<b>Short-term Liabilities</b>	Posting Accounts		Net Change	Net Amount	<input type="checkbox"/>	Yes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11	Revolving Credit	Posting Accounts	22100	Net Change	Net Amount	<input type="checkbox"/>	Yes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12	Accounts Payable	Total Accounts	22500	Net Change	Net Amount	<input type="checkbox"/>	Yes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13	Sales Taxes Payable	Total Accounts	22900	Net Change	Net Amount	<input type="checkbox"/>	Yes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14	Personnel-related Items	Total Accounts	23900	Net Change	Net Amount	<input type="checkbox"/>	Yes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15	Other Liabilities	Total Accounts	24400	Net Change	Net Amount	<input type="checkbox"/>	Yes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16	<b>Short-term Liabilities, Total</b>	Formula	11..15	Net Change	Net Amount	<input type="checkbox"/>	Yes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...	<b>Current Assets minus Short-term Liabilities</b>	Formula	06 16	Net Change	Net Amount	<input type="checkbox"/>	Yes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Microsoft Dynamics NAV

EDIT - ACCOUNT SCHEDULE NAMES + new

Name	Description	Default Column Layout
ANALYSIS	Capital Structure	BAL ONLY
BALANCE SH	Balance Sheet	BAL ONLY
BANK REPOR	current ratio	
CAMPAIGN	Campaign Analysis	BUDGANALYS
CA-PROF	Cost Acct. Summary Record DB per CC/CO	
CASH FLOW	Cash Flow Statement	PTD + YTD
CASHFLOW	Calculation Of Cash Flow	CASHFLOW
CA-STAFF	Cost Acct. Personnel Costs	
CA-TRANS	Cost Acct. Transfer	
DEFAULT	Standard Schedule	DEFAULT
DEGREE	Calculation of Cash Flow Ratio	DEGREE
I_CACVCLC	Data for Cash Cycle Chart	PERIODS
I_CASHFLOW	Data for Cash Flow Chart	PERIODS
I_INCEXP	Data for Income & Expense Chart	PERIODS
I_MINTRIAL	Data for Reduced Trial Balance Info Part	PERIODS
INCOME	Cash Flow Statement	PTD+YTD+%
M-BALANCE	Balance Sheet	M-BALANCE
M-CASHFLOW	Cash Flow Statement	M-NETCHANG
M-INCOME	Income Statement	M-NETCHANG
M-RETAIND	Retained Earnings	M-NETCHANG
REVENUE	Revenues	BUDGANALYS
VOX 1980	Vox 1980's	INCPD
VOX INCOME	Vox Monthly Income Statement	INCMTH

# 2 - Jet Reports



File Home Insert Page Layout Formulas Data Review View Dynamics NAV Power Pivot Jet Tell me what you want to do

fx 25000

Monthly Income Statement  
Year 2017  
Exclude Closing Entries TRUE

Account Number	Account Name	January	February	March	April	May	June	July	August	September	October	Nov
<b>Revenue</b>												
4100	Sales, Other Job Expenses		(143.00)									
4100	Total Sales of Jobs		(143.00)									
4200	Sales, Resources - Dom.		2,200.00									
4200	Total Sales of Resources		2,200.00									
4300	Sales, Raw Materials - Dom.	875,446.26	1,258,585.89	754,577.84	923,280.82	1,353,467.70	843,772.44	637,770.86	1,284,000.36	886,719.67	1,285,397.66	
43200	Sales, Raw Materials - EU	367,809.04	76,803.87				58,607.08		90,506.16	126,192.73		
43300	Sales, Raw Materials - Export		215,811.19	261,280.68	126,411.30	167,748.62	3,108.96	221,988.54	4,238.00	770,270.12	431,486.86	
43500	Total Sales of Raw Materials	1,243,255.30	1,550,868.94	1,015,858.32	1,049,692.12	1,521,216.32	905,488.48	858,959.40	1,378,884.52	1,183,182.52	1,716,884.52	1.84
4400	Sales, Retail - Dom.	193,408.09	200,480.61	214,166.40	212,351.23	178,786.38	125,476.11	117,865.71	124,182.25	221,493.36	199,500.61	
44200	Sales, Retail - EU	4,905.74			(583.88)	34,595.36	17,360.67	7,105.15	18,923.24	2,226.55	16,629.66	
44300	Sales, Retail - Export	14,555.87	34,584.59	17,502.51	24,043.88	36,196.11		3,226.35	11,988.65	30,385.79	23,347.29	
44389	Job Sales Applied, Retail		97,800.00	25,000.00	25,000.00							
44500	Total Sales of Retail	212,869.70	332,845.20	256,668.91	262,578.99	250,567.85	142,836.78	127,997.21	155,104.14	254,105.70	239,488.56	
45000	Consulting Fees - Dom.	42,250.00	52,812.50	52.8								
45100	Fees and Charges Rec. - Dom.	94.64	378.56									
45200	Discount Granted	(7,703.70)	(7,513.06)	(7.9								
4700	Interest on Bank Balances											
47800	TOTAL GAINS AND LOSSES											
4800	Unrealized FX Gains	(553.79)	102.22									
48200	Unrealized FX Losses											
48950	Total Revenue	(553.79)	102.22	1.24								
53100	Purch., Raw Materials - Dom.	(808,896.37)	(681,161.59)	(520,559.78)	(488,795.66)	(537,973.70)	(628,607.72)	(412,332.90)	(703,911.40)	(505,987.36)	(480,445.89)	

Options Income Statement READ ME

Report Runtime: 00:00:28

Name	Date modified	Type	Size
Jet NAV013 - Trial Balance vs Budget	5/3/2015 6:26 PM	Microsoft Excel Wor...	147 KB
NAV001 - Top Customer Overview	1/5/2015 3:20 PM	Microsoft Excel Wor...	78 KB
NAV002 - Forecast to Actual Calendar Format	9/12/2013 3:13 PM	Microsoft Excel Wor...	115 KB
NAV003 - Sales Dashboard	9/12/2013 7:21 PM	Microsoft Excel Wor...	454 KB
NAV004 - Overview on Salesperson Perform...	9/11/2013 11:29 AM	Microsoft Excel Wor...	65 KB
NAV005 - Item Sales by Customer	9/12/2013 2:27 PM	Microsoft Excel Wor...	210 KB
NAV006 - Item Returns to Vendor	9/12/2013 5:41 PM	Microsoft Excel Wor...	159 KB
NAV007 - Item Returns by Customer	9/12/2013 7:27 PM	Microsoft Excel Wor...	5,045 KB
NAV008 - Inventory Turnover	9/12/2013 1:52 PM	Microsoft Excel Wor...	111 KB
NAV009 - Trial Balance	9/12/2013 6:09 PM	Microsoft Excel Wor...	85 KB
NAV010 - Company Overview	9/10/2013 11:45 AM	Microsoft Excel Wor...	87 KB
NAV011 - Working Capital and Current Ratio	12/12/2013 6:09 PM	Microsoft Excel Wor...	50 KB
NAV012 - Trial Balance vs Previous Year	12/12/2013 6:09 PM	Microsoft Excel Wor...	113 KB
NAV013 - Trial Balance vs Budget	12/12/2013 6:09 PM	Microsoft Excel Wor...	133 KB
NAV014 - Trial Balance by Month	9/12/2013 6:22 PM	Microsoft Excel Wor...	110 KB
NAV015 - Profit and Loss Variance	9/10/2013 12:18 PM	Microsoft Excel Wor...	68 KB
NAV016 - GL Monthly Income Statement	9/10/2013 12:20 PM	Microsoft Excel Wor...	59 KB
NAV017 - Accounts Receivable Summary	9/10/2013 12:23 PM	Microsoft Excel Wor...	92 KB
NAV018 - Accounts Receivable with Details	9/12/2013 6:26 PM	Microsoft Excel Wor...	394 KB
NAV019 - Accounts Payable Summary Report	9/10/2013 12:28 PM	Microsoft Excel Wor...	58 KB
NAV020 - Accounts Payable Details	9/12/2013 6:31 PM	Microsoft Excel Wor...	841 KB
NAV021 - Income Statement Budget and Vari...	9/10/2013 1:11 PM	Microsoft Excel Wor...	134 KB
NAV022 - Inventory Availability	9/12/2013 4:44 PM	Microsoft Excel Wor...	89 KB
NAV023 - Production BOMs	9/12/2013 6:40 PM	Microsoft Excel Wor...	60 KB
NAV024 - Item Sales and Profit	9/12/2013 6:44 PM	Microsoft Excel Wor...	65 KB
NAV025 - Status of Shipments	9/12/2013 7:00 PM	Microsoft Excel Wor...	136 KB
NAV026 - Service Warranty for Customers	9/12/2013 7:01 PM	Microsoft Excel Wor...	50 KB

# Income statements

# VOX ISM

Auto+Hide+Values

Jet Report Modified 80's format for Jim MTD/YTD

For the twelve month ended December 31, 2013

Date Range From 9/30/2014

Dimension WOLF

Date Range to 10/30/2014

MTD dates Y

8/31/2014

9/30/2014

	2014 MTD	%	2013 MTD	%	Diff MTD	%	YTD 2014	%	YTD 2013	%	Diff YTD	%
<b>Revenue</b>												
4060.01 Wood Stoves & Inserts	401,912	7.3%	524,855	9.5%	(122,943)	-30.6%	1,351,957	24.4%	1,753,869	31.7%	(401,912)	-22.9%
4030.01 Gas Napoleon	2,639,585	47.7%	3,984,096	71.9%	(1,344,512)	-50.9%	14,821,454	267.6%	17,461,038	315.3%	(2,639,585)	-15.1%
4110.10 Gas Continental	-		-		-		-		-		-	
4285.01 Electric	-		-		-		-		-		-	
4160.01/4080.0 Oil/Pellet	29,425	0.5%	20,936	0.4%	8,489	28.8%	73,631	1.3%	103,056	1.9%	(29,425)	-28.6%
4553.03 Furnaces - Other	-		-		-		-		-		-	

## Monthly Income Statement

Year 2011

Exclude Closing Entries TRUE

Account Name	January	February	March	April	May	June	July
<b>Revenue</b>							
5 Total Sales of Retail	671,710.20	451,432.90	503,309.00	545,641.40	666,979.70	701,130.90	862,549.00
5 Total Sales of Raw Materials	-	-	-	-	-	-	-
5 Total Sales of Resources	-	-	-	-	-	-	-
5 Total Sales of Jobs	-	-	-	-	-	-	-
0 Consulting Fees - Dom.	-	-	-	-	-	-	-
0 Fees and Charges Rec. - Dom.	4,650.00	3,540.00	4,510.00	4,630.00	5,440.00	3,970.00	4,040.00
0 Discount Granted	(49,022.07)	(31,696.90)	(35,784.93)	(37,049.46)	(46,582.44)	(50,909.00)	(66,102.98)
9 Total Sale of Serv. Contracts	-	-	-	-	-	-	-
<b>Total Revenue</b>	<b>627,338.13</b>	<b>423,276.00</b>	<b>472,034.07</b>	<b>513,221.94</b>	<b>625,837.26</b>	<b>654,191.90</b>	<b>800,486.02</b>

# Costing. Manage All Costs on One Screen



**Estimated Costs**   **Budgeted Costs**   **Actual Costs**   **Outstanding Purchase Orders**   **Received not invoiced**

Job Task No.	Description	Job Task Type	ESTIMATE	Budget Hrs.	Actual Hours	Total Estimated Cost	Budget (Total Cost)	Usage (Total Cost)	Budget (Total Price)	Remaining (Total Cost)	Remaining (Total Price)	Outstanding Orders	Am't Rcd. Not Invoiced	EAC (Total)
000.000	<b>JOB SUMMARY</b>	Begin-Total	0.00	0.00	0.00	0.00						0.00	0.00	
010.000	<b>Revenue Summary</b>	Begin-Total	0.00	0.00	0.00	0.00						0.00	0.00	
010.100	Contract	Posting	0.00	0.00	0.00	0.00			95,000.00	95,000.00	95,000.00	0.00	0.00	
010.200	Engineering Changes	Posting	0.00	0.00	0.00	0.00						0.00	0.00	
010.999	<b>Revenue Total</b>	End-Total	0.00	0.00	0.00	0.00			95,000.00	95,000.00	95,000.00	0.00	0.00	
020.000	<b>Management</b>	Begin-Total	0.00	0.00	0.00	0.00								
020.100	Project Management	Posting	280.00	275.00	0.00	20,160.00	19,800.00				19,800.00			
020.110	Mechanical Design	Posting	40.00	42.00	0.00	2,880.00	3,141.60		5,208.00		3,141.60			
020.120	Electrical Design	Posting	296.00	280.00	0.00	21,312.00	4,088.00		8,092.00		4,088.00			
020.130	Pneumatic and Hydraulic Drawings	Posting	80.00	0.00	0.00	5,760.00								
020.140	PLC Programming	Posting	80.00	0.00	0.00	4,400.00								
020.150	Panel - Build	Posting	40.00	0.00	0.00	2,200.00								
020.160	Electrical Build	Posting	200.00	0.00	0.00	11,000.00								
020.170	Mechanical Build	Posting	40.00	0.00	0.00	2,200.00								
020.180	PLC testing	Posting	16.00	0.00	0.00	1,152.00								
020.190	In House Run Off	Posting	23.00	0.00	0.00	1,656.00								
020.999	<b>Management Total</b>	End-Total	1,095.00	597.00	0.00	72,720.00	27,029.60		13,300.00		27,029.60			
030.000	<b>Components</b>	Begin-Total	0.00	0.00	0.00	0.00								
030.100	Mechanical Components	Posting	1.00	0.00	0.00	5,000.00	4,157.00				4,157.00			
030.200	Electrical Components	Posting	1.00	0.00	0.00	12,000.00	16,826.00				16,826.00			
030.300	Vision Components	Posting	1.00	0.00	0.00	3,000.00								
030.400	Robotic Components	Posting	1.00	0.00	0.00	4,500.00								
030.500	Computer Components	Posting	1.00	0.00	0.00	1,500.00								
030.600	Other Components	Posting	1.00	0.00	0.00	1,000.00								
030.999	<b>Components Total</b>	End-Total	6.00	0.00	0.00	27,000.00	20,983.00							
040.000	<b>Installation</b>	Begin-Total	0.00	0.00	0.00	0.00								

General	Standard Cost	Expected Cost	Actual Cost	Dev. %	Variance
Material Cost:	0.00	0.00	0.00	0	0.00
Capacity Cost:	37,000.00	32,502.60	32,502.60	-12	-4,497.40
Subcontracted Cost:	0.00	0.00	0.00	0	0.00
Capacity Overhead:	48,896.00	40,641.48	40,641.48	-17	-8,254.52
Manufacturing Overhead:	0.00	0.00	0.00	0	0.00
<b>Total Cost:</b>	<b>85,896.00</b>	<b>73,144.08</b>	<b>73,144.08</b>	<b>-15</b>	<b>-12,751.92</b>
Capacity Need:	MINUTES	72,036	72,036	0	

**Dynamics NAV Manufacturing.**  
 Cost, track, schedule, report.



# Cash-flow

Edit - Acc. Schedule Overview - M-CASHFLOW - M-NETCHANG

HOME ACTIONS

New View List Edit List Delete Previous Column Next Column Previous Period Next Period Show as List Show as Chart Refresh Clear Filter Page Find

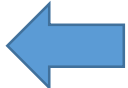
General

Account Schedule Name: M-CASHFLOW View by: Month  
 Column Layout Name: M-NETCHANG Date Filter: 03/01/19..03/31/19

Dimension Filters

Department Filter: G/L Budget Filter:

Row No.	Description	Net Change
P0001	<b>Operating Activities</b>	
P0002	Net Income	139,642.96
P0003	Adjustments to reconcile Net Income to ...	
P0004	Accounts Receivable	19,677.94
P0005	Prepaid Expenses	
P0006	Inventory	138,830.40
P0007	Current Liabilities	-27,095.06
P0008	Payroll Liabilities	
F0009	<b>Net Cash Provided by Operating Activi...</b>	<b>131,413.28</b>
P0010		
P0011	<b>Investing Activities</b>	
P0012	Equipment	
P0013	Accumulated Depreciation	
F0014	<b>Net Cash Provided by Investing Activit</b>	
P0015		
P0016	<b>Financing Activities</b>	
P0017	Long Term Liabilities	-300.00
P0018	Distributions to Shareholders	
F0019	<b>Net Cash Provided by Distribution to S...</b>	<b>-300.00</b>
P0020		
F0021	Net Cash Increase for the Period	131,113.28
P0022	Cash at Beginning of the Period	724,301.96
F0023	<b>Cash at End of the Period</b>	<b>855,415.24</b>



Edit - Cash Flow Setup

HOME ACTIONS

Open Cortana Intelligence Gallery View Edit OneNote Notes Links Refresh Clear Filter Page Go to

### Cash Flow Setup

General

Automatic Update Frequency: Daily

Accounts

Receivables CF Account No.: 0010 FA Budget CF Account No.: 1070  
 Payables CF Account No.: 1010 FA Disposal CF Account No.: 0050  
 Sales Order CF Account No.: 0020 Job CF Account No.: 0080  
 Service CF Account No.: 0080 Tax CF Account No.: 1100  
 Purch. Order CF Account No.: 1020

Numbering

Cash Flow Forecast No. Series: CASHFLOW

Tax

Taxable Period: Quarterly Tax Bal. Account Type:  
 Tax Payment Window: Tax Bal. Account No.:

Cortana Intelligence

Period Type: Month API URL:  
 Historical Periods: 24 API Key:  
 Horizon: 4 Variance %: 35  
 TimeOut: 120 Cortana Intelligence Enabled:  
 Total Processing Time: 0

Cashflow setup and reporting out of the box

# Excel Tools We Love



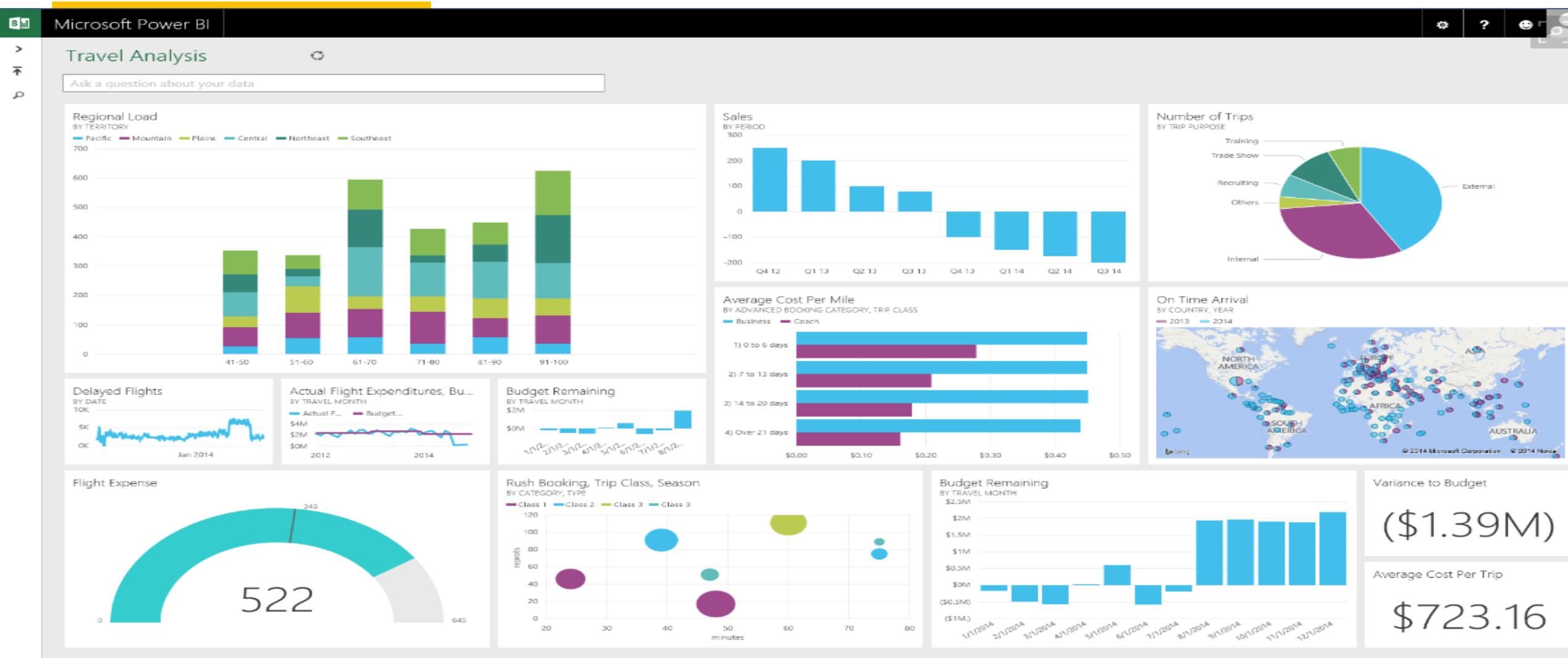
Bi-Directional, download then uploads

Posting Date	Document Type	Document No.	Customer No.	Message to Recipient	Description	Currency Code	Original Amount	Amount	Remaining Amount
3/26/2018	Invoice	103040	ABSS4G45		Invoice 1018		2,447.58	2,447.58	2,447.58
2/15/2017	Invoice	103038	ABSS4G45		Invoice 1016		113,000.00	113,000.00	113,000.00
3/15/2017	Invoice	103037	ABSS4G45		Invoice 1014		28,250.00	28,250.00	28,250.00

	A	B	C	D	E	F	G	H	I	J	K
1	Posting Date	Document Type	Document No.	Customer No.	Message to Recipient	Description	Currency Code	Original Amount	Amount	Remaining Amount	Due Date
2	3/26/2018	Invoice	103040	ABSS4G45		Invoice 1018		2,447.58	2,447.58	2,447.58	3/16/2017
3	2/15/2017	Invoice	103038	ABSS4G45		Invoice 1016		113,000.00	113,000.00	113,000.00	3/1/2017
4	3/15/2017	Invoice	103037	ABSS4G45		Invoice 1014		28,250.00	28,250.00	28,250.00	3/29/2017
5	4/15/2017	Invoice	103036	ABSS4G45		Invoice 1015		28,250.00	28,250.00	28,250.00	4/29/2017
6	2/22/2017	Invoice	103035	ABSS4G45		Invoice 1013		28,250.00	28,250.00	28,250.00	3/8/2017
7	2/15/2017	Invoice	103033	10000		Invoice 1005		38,000.00	38,000.00	38,000.00	3/15/2017

# Power BI – Business Reporting

# VOX ISM



Power BI is a suite of business analytics tools to analyze data and share insights.

# Improve Productivity with the Outlook App

# VOX ISM

The screenshot shows the Outlook app interface. The main window displays an email from David Cameron with the subject "Cannot find invoice PS-INV103220 - can you resend Jim?". Below the email, a "Financials" pane is open, showing details for invoice PS-INV103220. The invoice details include:

PS-INV103220 · David Cameron			
No.	PS-INV103220	Due Date	2018-03-08
Customer	David Cameron	Quote No.	
Contact	DAVID CAMERON	Order No.	
Posting Date	2018-02-08	Closed	No

Below the invoice details, there is a table with columns: Type, No., Description, Quantity, Unit of Measure, Unit Price Excl., Tax Group Code, Line Discount %, Line Amount Excl., and Amount. The table is currently empty.

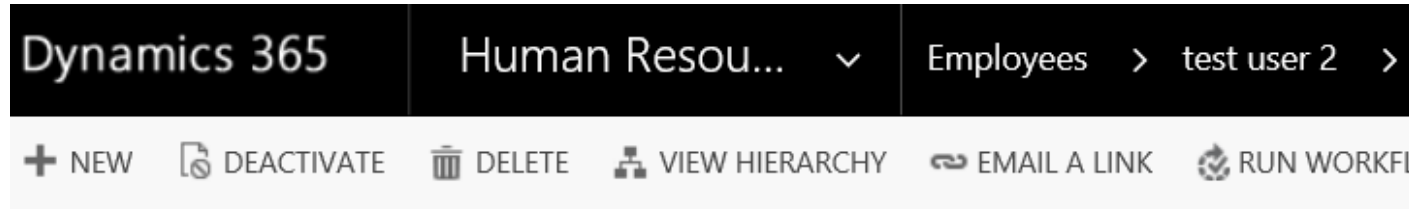
The Financials sidebar displays several key metrics and charts:

- Balance (\$):** 2.24 (Current), 0.00 (Past Due)
- LTD Sales:** 1.98
- YTD Sales:** 1.98
- Aged Accounts Receivable:** A bar chart showing 3 units in the "Not Overdue" category.
- Sell-to Customer Sales History:** A grid of metrics:
  - Ongoing Sales Quotes: 0
  - Ongoing Sales Blanket Orders: 0
  - Ongoing Sales Orders: 0
  - Ongoing Sales Invoices: 0
  - Ongoing Sales Credit Memos: 0
  - Posted Sales Shipments: 1

# Human Capital Management

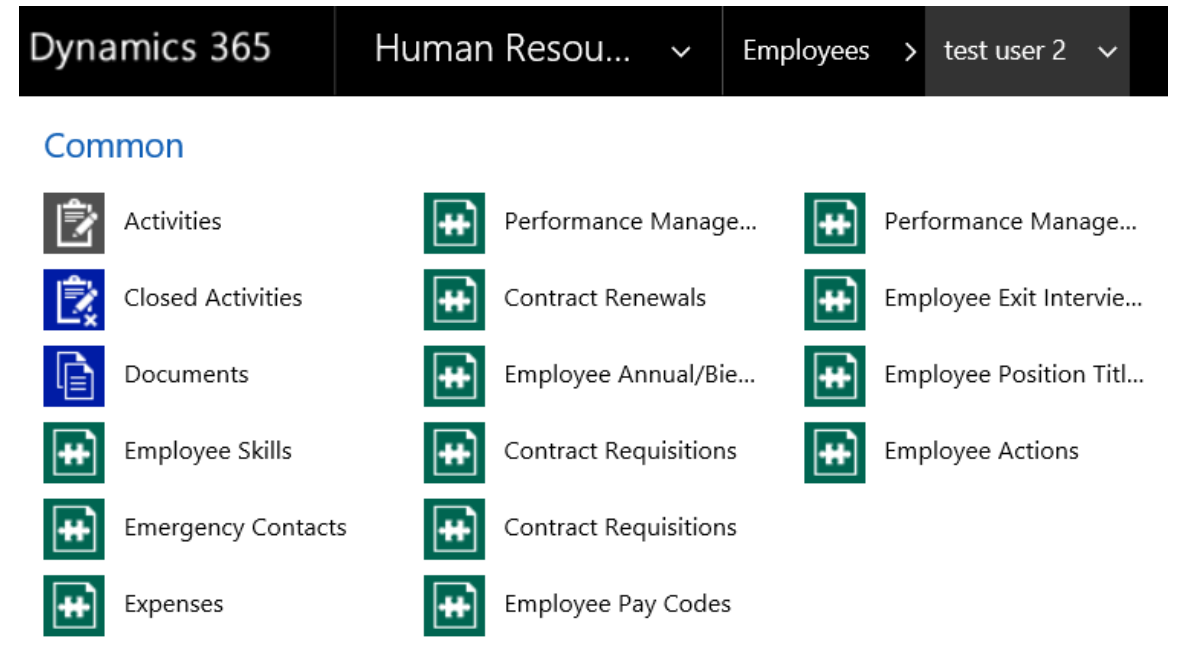


Create Work Orders and book resources to perform tasks related to them. Products, service tasks, and characteristics are added automatically when you create a work order from an incident. Otherwise you can add them manually when you create a work order.



EMPLOYEE : INFORMATION  
test user 2











- ▶ Personal Profile
- ▶ Employment Profile
- ▶ Skills Certifications and Education Records
- ▶ New Hire/Annual and Biennial Documentation
- ▶ Performance Management and Contracts





# Integrated Recruitment Process

Manage the complete process – Job Requisitions – Candidates – Applicants – Contracts/On boarding

Recruitment	Contract
 Job Posting Requisition	 Contract Requisitions
 Job Requisition Status...	 Contract Requisition I...
 Job Applicant Requisition...	 Contract Requisition S...
 Job Applicant Requisition...	 Contract Requisition S...
 Job Applicant Reference...	
 Job Applicants	

Dynamics 365 | HCM | Job Posting Requisition | Test Name

+ NEW | DEACTIVATE | DELETE | ASSIGN | SHARE | EMAIL A LINK | RUN V

JOB POSTING REQUISITION : INFORMATION

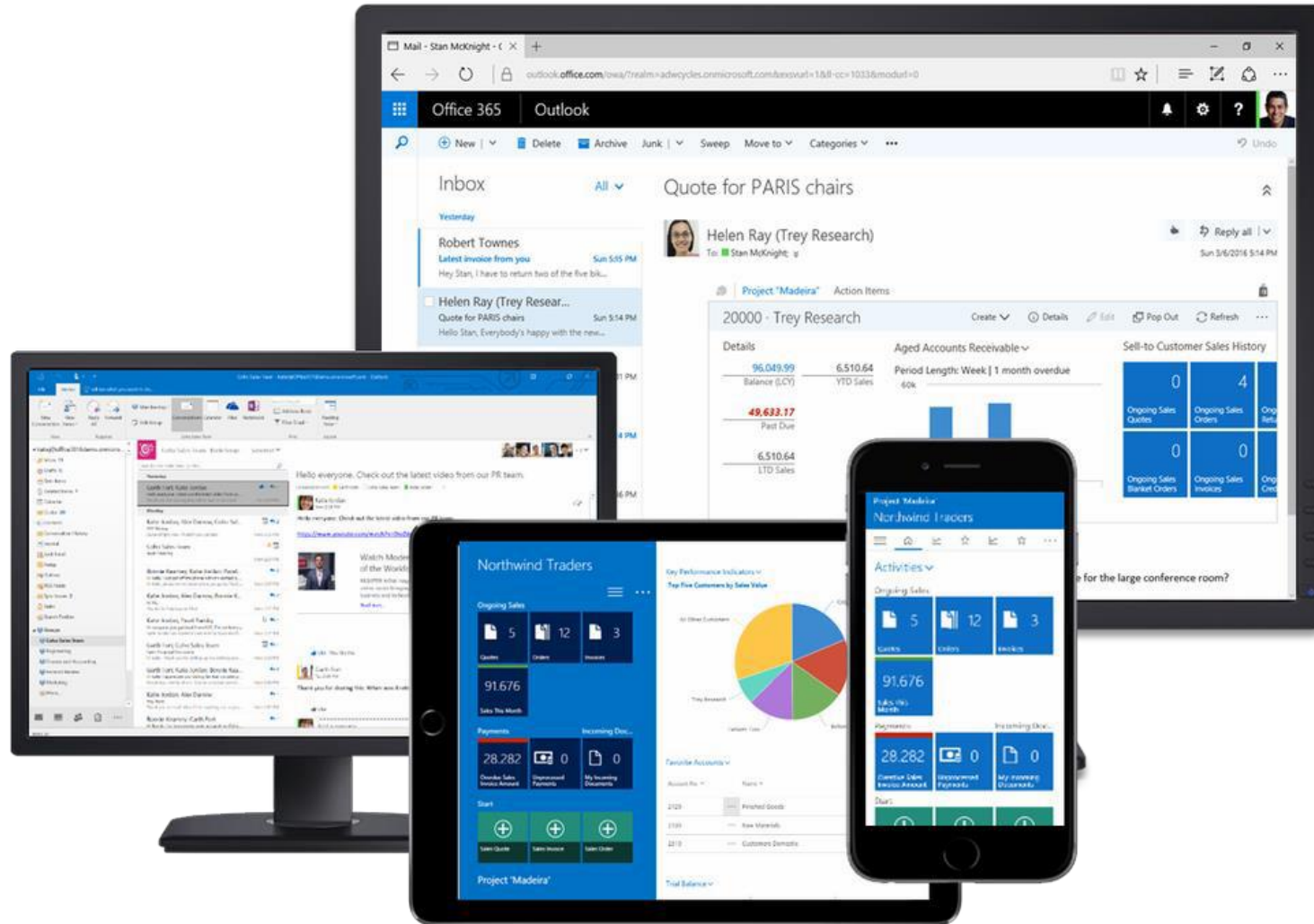
## Test Name

General

Requisition #	1
Posting Request Date	5/5/2017 3:01 AM
Requesting Manager Name *	Test F Test L
Office Site/Clinic *	Financing under
Reasons *	Replacement
Position Title *	Test Position
Department *	Finance
Position Type *	Casual
Place of Work *	Office
Geographical Area *	Geo1
Union Status *	Corporate Employee
FTE Status *	0.8
Requested Start Date *	5/17/2017
Other Information	--

# Work anywhere anytime (phone, tablet, web)

# VOX ISM



Out of the box full deployment on all devices

- Web deployment
- Handhelds
- iPhones
- Androids
- Blackberry
- Windows Phone 8
- Laptops
- Tablets
  
- **No additional costs**

# Manufacturing, Accounting, & Distribution in 1 integrated system VoxISM

Departments - Microsoft Dynamics NAV

CRONL

**Multi-company/Intercompany**

**Departments**

- Financial Management
- Sales & Marketing
- Purchasing
- Warehouse
- Manufacturing
- Jobs
- Resource Planning
- Service
- Human Resources
- Administration
- Time Collection Module

**Choose by department**

**Financial Management**

- General Ledger
- Cash Management
- Cost Accounting
- Cash Flow
- Receivables

**Sales & Marketing**

- Sales
- Order Processing
- Marketing

**Purchasing**

- Planning
- Order Processing

**Warehouse**

- Orders & Contacts
- Planning & Execution
- Goods Handling Order b...

**Manufacturing**

- Product Design
- Capacities
- Planning

**Fixed Assets/PM**

- Payables
- Fixed Assets
- Inventory
- Periodic Activities
- Setup

**Inventory & Pricing**

- Inventory & Pricing
- Microsoft Dynamics CRM

**Inventory & Costing**

- Inventory & Costing

**Goods Handling Multipl...**

- Goods Handling Multipl...
- Inventory
- Assembly

**Execution**

- Execution
- Costing
- Labour-Time Reporting

**Jobs**

**Resource Planning**

**Service**

- Contract Management
- Planning & Dispatching

**Order Processing**

**Human Resources**

**Administration**

- IT Administration
- Application Setup

**Application To**

**Time Collection Module**

- Time Collection
- Payroll

**Quality Safety**

**Production Scheduling**

**Time Collection, Shop Floor Execution System, Quality, Safety and Payroll**

**Distribution and Barcoding**

**Manufacturing**

How much of NAV are you using?

# Getting Started – Assisted Setup



Name	Help	Video	Assist... Setup	Product Tour
Set up my company	...		Start	
Learn about Financials	... Read	Watch		
Migrate business data	... Read	Watch	Start	
Set up sales tax	... Read		Start	
Set up bank integration	... Read	Watch		
Add a customer	... Read			Try
Add an item	... Read			Try
Create a sales invoice	... Read			Try

**Help**  
**Videos**  
**Assisted Set Up**  
**Product**  
**All modules**

# Getting Started – Assisted Setup

# VOX ISM

The screenshot displays the Microsoft Dynamics NAV Accounting Manager interface. On the left, the 'Role Center' lists various activities, with 'General Ledger Setup' highlighted in a red box. A red arrow points from this box to the 'Edit - General Ledger Setup' window on the right. The 'Edit - General Ledger Setup' window shows the 'General' tab with various configuration options:

- General:**
  - Allow Posting From: 8/30/2017
  - Allow Posting To: 12/31/2019
  - Local Address Format: City+State+ZIP Code
  - Inv. Rounding Precision (\$): 0.01
  - Inv. Rounding Type (\$): Nearest
  - LCY Code: CAD
  - Local Currency Symbol: \$
  - Tax Rounding Type: Nearest
  - Bank Account Nos.: BANK
  - Bank Rec. Adj. Doc. Nos.: BANKRECADI
  - Deposit Nos.: BANKDEP
  - VAT in Use:
  - Bank Recon. with Auto. Match:
- Dimensions:**
  - Global Dimension 1 Code: DEPARTMENT
  - Global Dimension 2 Code: PROJECT
- Reporting:**
  - Acc. Sched. for Balance Sheet: M-BALANCE
  - Acc. Sched. for Income Stmt.: M-INCOME
  - Acc. Sched. for Cash Flow Stmt.: M-CASHFLOW
  - Acc. Sched. for Retained Earn.: M-RETAIND
  - Additional Reporting Currency: [Empty]
  - Tax Exchange Rate Adjustment: No Adjustment
  - Tax Reg. No. Validation URL: http://ec.europa.eu/taxation\_customs/vies/services/checkVatService
- Application:**
  - Electronic Invoice
  - VOXISM

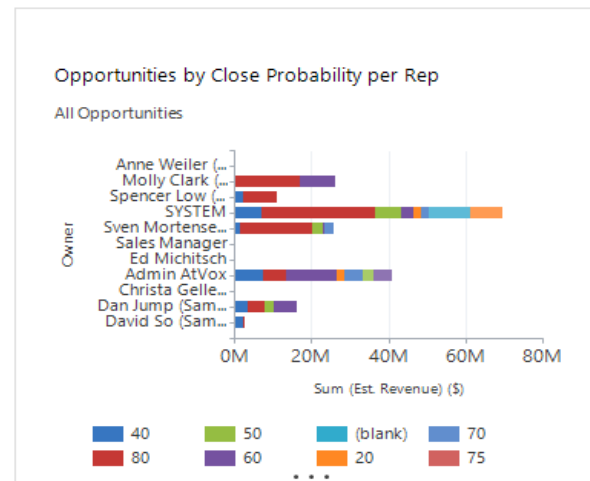
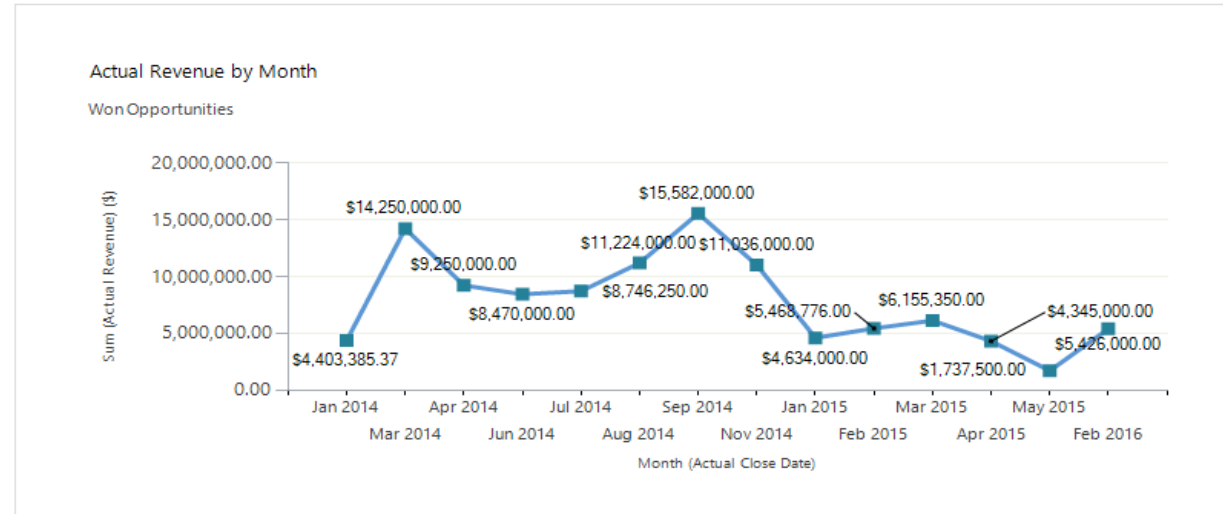
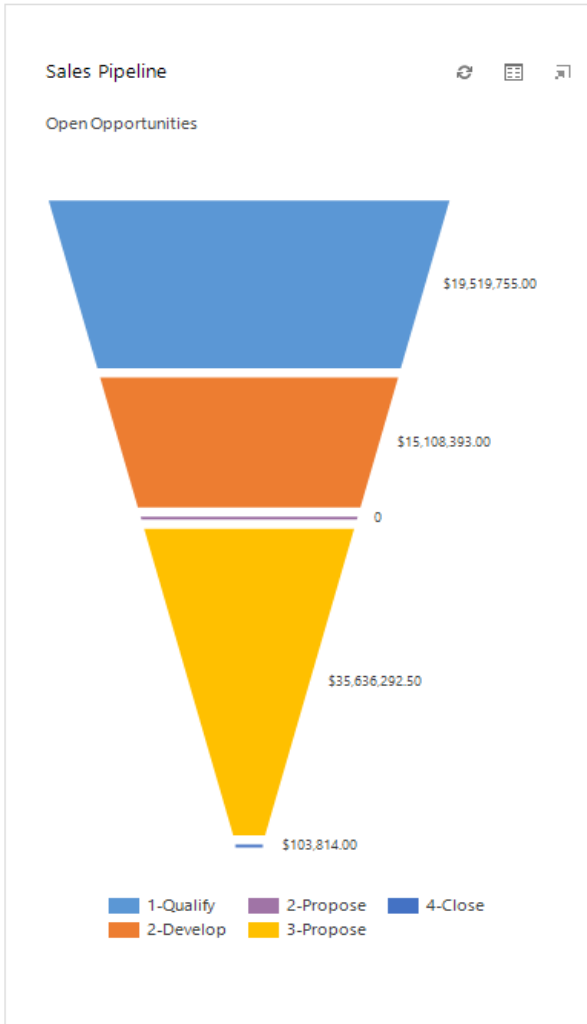
Software for Canadian Manufacturers

Vox ISM | www.voxism.com | 416.488.4899 | jheaton@voxism.com



# Microsoft CRM for Sales

Sales Management ▾



Top Open Opportunities ▾

Search for records

Topic	Est. Revenue ↓	Prob...	Owner
Expressed interest in A. D...	\$10,569,962.50	85	SYSTEM
Audio Equipment	\$8,710,785.00	95	SYSTEM
Printers	\$4,931,300.00	99	Admin AtV
Video Hardware Upgrade	\$4,750,000.00	70	Admin AtV
Refrigeration Smart Sens...	\$3,550,000.00	50	SYSTEM
4G Enabled Tablets	\$3,257,500.00	76	Spencer Lc
Home Electronic Systems...	\$3,142,000.00	50	Sven Mort
Home PC	\$2,470,860.00	40	Admin AtV

# The Account Screen

**Artificial intelligence keeping you in-the-know.**

**ACCOUNT INFORMATION**

- \*Account Name: Pacline Overhead Conveyors Ltd
- Account Number: PACLINE
- Phone: 416-525-5004
- Fax: 905-858-2333
- Website: <https://www.pacline.com>
- Parent Account: -----

**ADDRESS**

5735 McAdam Road  
Mississauga ON L4Z 1N9  
Canada

**Relationship Assistant**

**Opportunity Closing Soon**  
Casters & Frames for Pacline  
Opportunity closes on March 2, 2018.  
[OPEN OPPORTUNITY](#)

**DYNAMICS NAV ACCOUNT STATISTICS**

Category	Item	Value
Dynamics NAV Customer	Dynamics NAV Customer	AIE01
	Balance	\$19,924.69
	Modified On	6/1/2017 6:42 PM
Sales	Outstanding Orders	\$746.40
	Shipped Not Invd.	\$0.00
	Outstanding Invoices	\$0.00
Service	Outstanding Serv. Orc	\$0.00
	Serv. Shipped Not Inv	\$0.00
	Outstanding Serv. Inv	\$0.00
	Total	\$20,671.09
	Credit Limit	\$0.00
Overdue Amounts	\$16,464.40	
Overdue Amounts as of	5/31/2017	
Total Sales	\$21,685.07	

**Relationship Assistant Posts:**

- RGA Request: Damaged shipment**  
Case: Created by Admin Vox ISM for Account Pacline Overhead Conveyors Ltd.  
On RGA Request: Damaged shipment's wall  
06/02/2018 19:49:30
- Manufacturing Project Opportunity**  
Opportunity: Created by Admin Vox ISM for Account Pacline Overhead Conveyors Ltd.  
On Manufacturing Project Opportunity's wall  
17/01/2018 15:34:29
- Damaged Part**  
Case: Created by Jim Heaton for Account Pacline Overhead Conveyors Ltd.

# Driving Sales with Opportunities

# VOX ISM

The screenshot shows the Dynamics 365 Sales interface for an Opportunity. The top navigation bar includes 'Dynamics 365', 'Sales', and 'Opportunities'. The main header displays the opportunity name 'Demo: Order 100units HH Parka' along with key metrics: 'Est. Close Date: 12/9/2016', 'Est. Revenue: CAD4,750.00', 'Status Reason: In Progress', and 'Owner: Admin AtVox'. Below the header is a workflow progress bar with stages: 'Qualify (Active for 322 days, 13 hours)', 'Propose', 'Contract', and 'Close'. The 'Qualify' stage is active and shows completed tasks: 'Identify Contact' (Jim Heaton), 'Identify Account\*' (Air Canada Express), and 'Purchase Timeframe' (Immediate). The 'Propose' stage shows 'Estimated Budget' (CAD4,500.00), 'Purchase Process' (Individual), and 'Identify Decision Maker' (completed). The 'Contract' stage shows 'Capture Summary' (The customer needs 100 units). Below the workflow is a 'Summary' section with fields for Topic, Sales Stage, Type, Account, and Description. A blue box highlights the 'Originating Lead' field, which is 'Nancy Anderson, Sales Manager', with a blue arrow pointing to it. To the right of the summary is a list of activities: 'Product review meeting' (Due Date: 10/13/2017 12:30 PM), 'Jim Heaton Meeting follow up' (Modified by Admin AtVox), and 'Product Sample' (Priority: Normal).

Workflows guide the reps through the process and automatically creates tasks, emails, and appointments in Outlook

The screenshot shows the Dynamics 365 Sales navigation pane. The top navigation bar includes 'Dynamics 365', 'Sales', and 'Opportunities'. The main navigation pane is divided into four sections: 'Common', 'Sales', 'Field Service', and 'Process Sessions'. The 'Common' section includes 'Activities', 'Documents', 'Connections', and 'Competitors'. The 'Sales' section includes 'Quotes', 'Orders', 'Invoices', and 'Products'. The 'Field Service' section includes 'Work Orders'. The 'Process Sessions' section includes 'Audit History'.

# Benefits of Using Workflow

**VOX ISM**



Workflow Processes Are Consistent



Cycle Time is Reduced



Each Workflow Can Be Checked



Workflow Support Conditional Processes



Nothing is Forgotten



Processes Are Automated

# Integration With LinkedIn

# VOX ISM



Dynamics 365 Project Service Customers Pacline Overhead Co...

NEW DEACTIVATE CONNECT ADD TO MARKETING LIST DYNAMICS 365 BUSINES... ASSIGN EMAIL A LINK DELETE FORM

ACCOUNT Pacline Overhead Conveyors Ltd

Primary Contact: Karl scholz, Main Phone: 416-525-5004, Relationship Type: Customer, Owner: Jim Heaton

### Summary

ACCOUNT INFORMATION	
Account Name	Pacline Overhead Conveyors ltd
Account Number	.....
Phone	416-525-5004
Fax	905-858-2333
Website	<a href="https://www.pacline.com">https://www.pacline.com</a>
Parent Account	.....
Relationship Type	Customer
Product Price List	CRM Service USA (sample)

POSTS ASSISTANT ACTIVITIES NOTES ONENOTE

Enter post here [POST]

All posts Auto posts User posts

- Damaged Part**  
Case: Created by Jim Heaton for Account Pacline Overhead Conveyors Ltd.  
On Damaged Part's wall Today 12:16:52 PM
- Power Coating Conveyor Belts**  
Opportunity: Created by Admin Vox ISM for Account Pacline Overhead Conveyors Ltd.  
On Power Coating Conveyor Belts' wall

Primary Contact: Karl scholz  
Email: mfontaine@voxism.com  
Business: 1-416-525-5004

### CONTACTS

Full Name ↑	Email
Albert Bensadon	ABensadon@pacline...
Elana Moriarty	EMoriarty@pacline.c...

View Profile Save as Lead

### Highlights

20 shared connections

Recommended leads: Karl Scholz (1st degree), Kristina Tomasevic (1st degree)



# Activity Management

# VOX ISM

Multiple levels of **activity tracking**. All activities are tracked at the Account, Contact, Opportunity levels. They also flow into your to-do lists and your reporting dashboards.

**Dynamics 365** | Sales | Activities

TASK | EMAIL | APPOINTMENT | PHONE CALL | LETTER | FAX | SERVICE ACT

My Activities

Due: All

Activity Type	Subject	Regarding	Priority
Phone Call	Welcome to the team! CRM:0006007	Admin	Normal
Phone Call	Welcome to the team! CRM:0006007	Ableman	Normal
Phone Call	Initial Planning Call	Marketing i...	Normal
Phone Call	Phone Call Invite	Initial Call t...	Normal
Task	Write the Blog	News or Ev...	Normal
Task	Update Website	News or Ev...	Normal
Task	Create Marketing List	News or Ev...	Normal
Campaign Activity	Initial Call to invite	News or Ev...	Normal

POSTS ASSISTANT ACTIVITIES NOTES ONENOTE

Today's Insights (Preview)

No Activity with Opportunity  
**Field Service Opportunity**

There's been no activity with this opportunity since Friday, July 14, 2017.

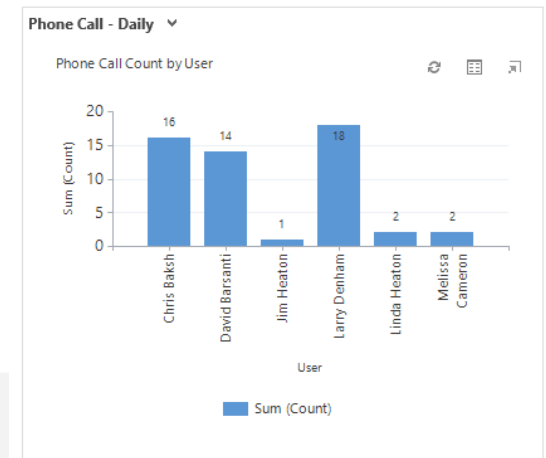
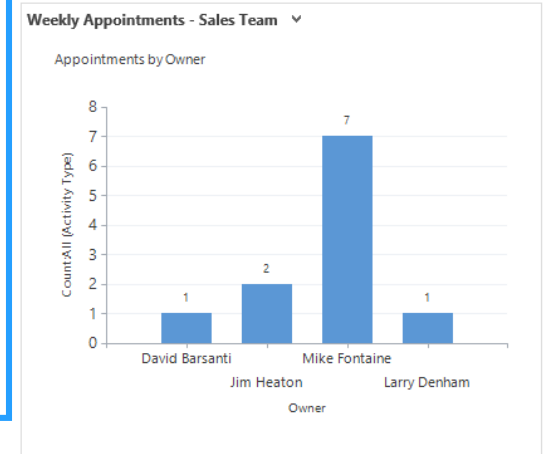
OPEN OPPORTUNITY SEND EMAIL

No Activity with Case  
**Damaged Skid**

There's been no activity with this case since Thursday, October 12, 2017.

OPEN CASE SEND EMAIL

Artificial Intelligence automatically suggests activities based on your activity history and important dates.



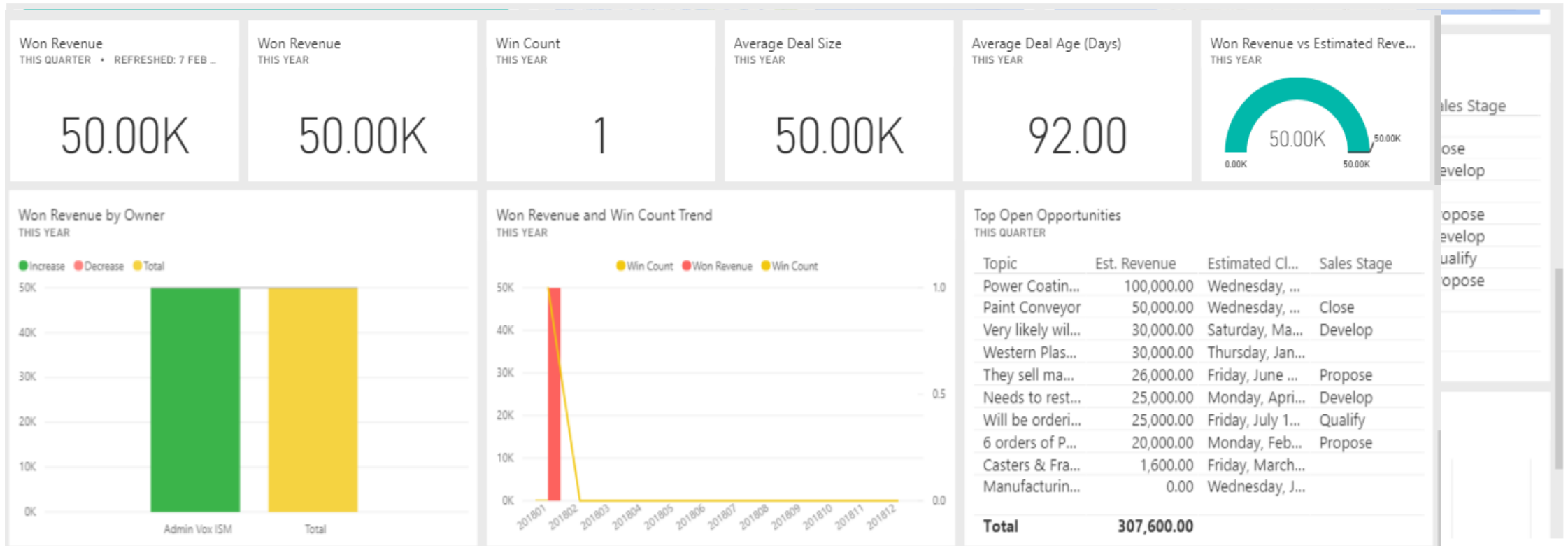
# Sales Management Reporting

Dynamics 365 Sales Dashboards

SAVE AS NEW EDIT DELETE SET AS DEFAULT SHARE DASHBOARD ASSIGN REFRESH ALL OPEN IN POWER BI

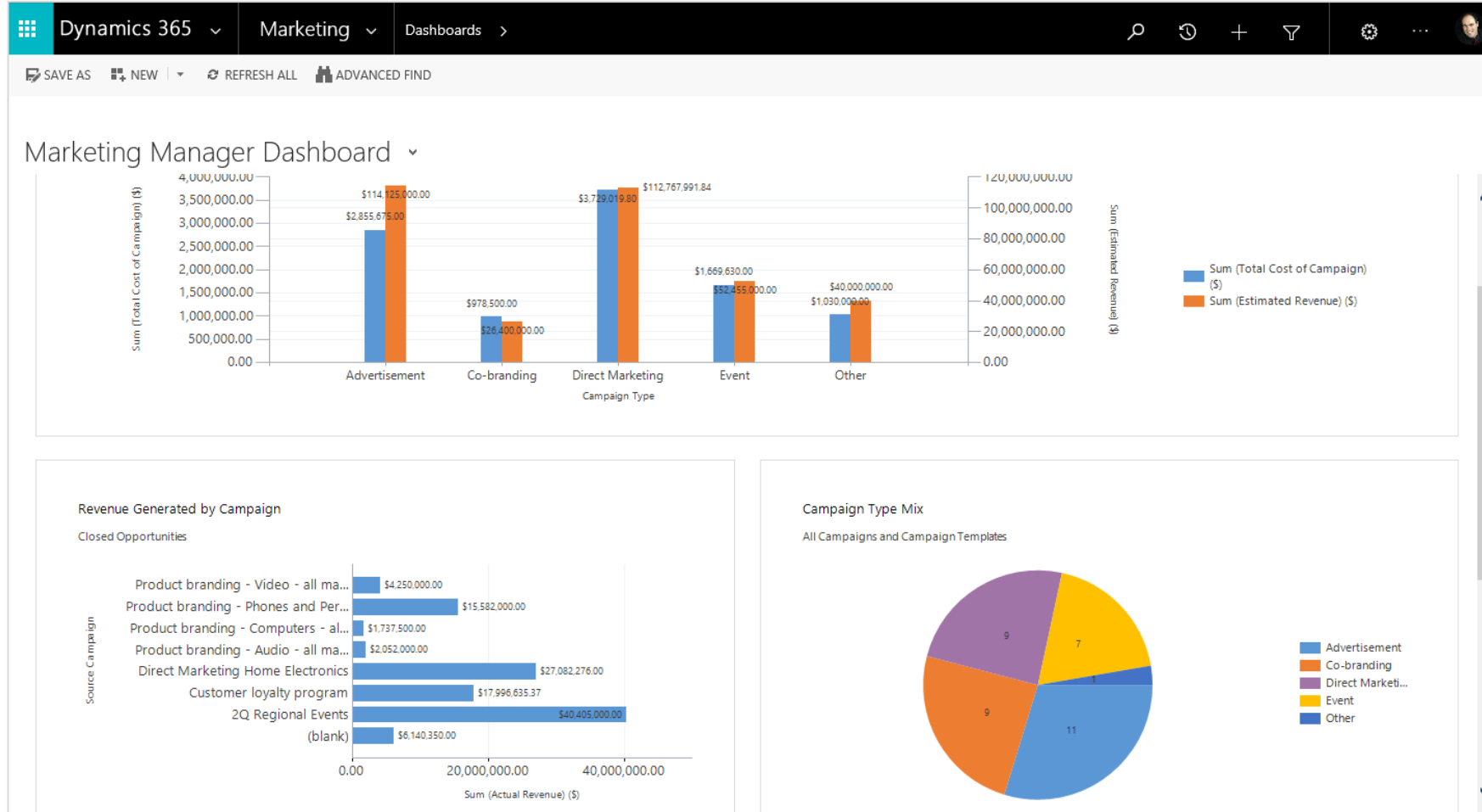
Sales Analytics for Dynamics 365

Power BI Dashboards And Reporting Right From Within CRM



# Marketing with Dynamics 365

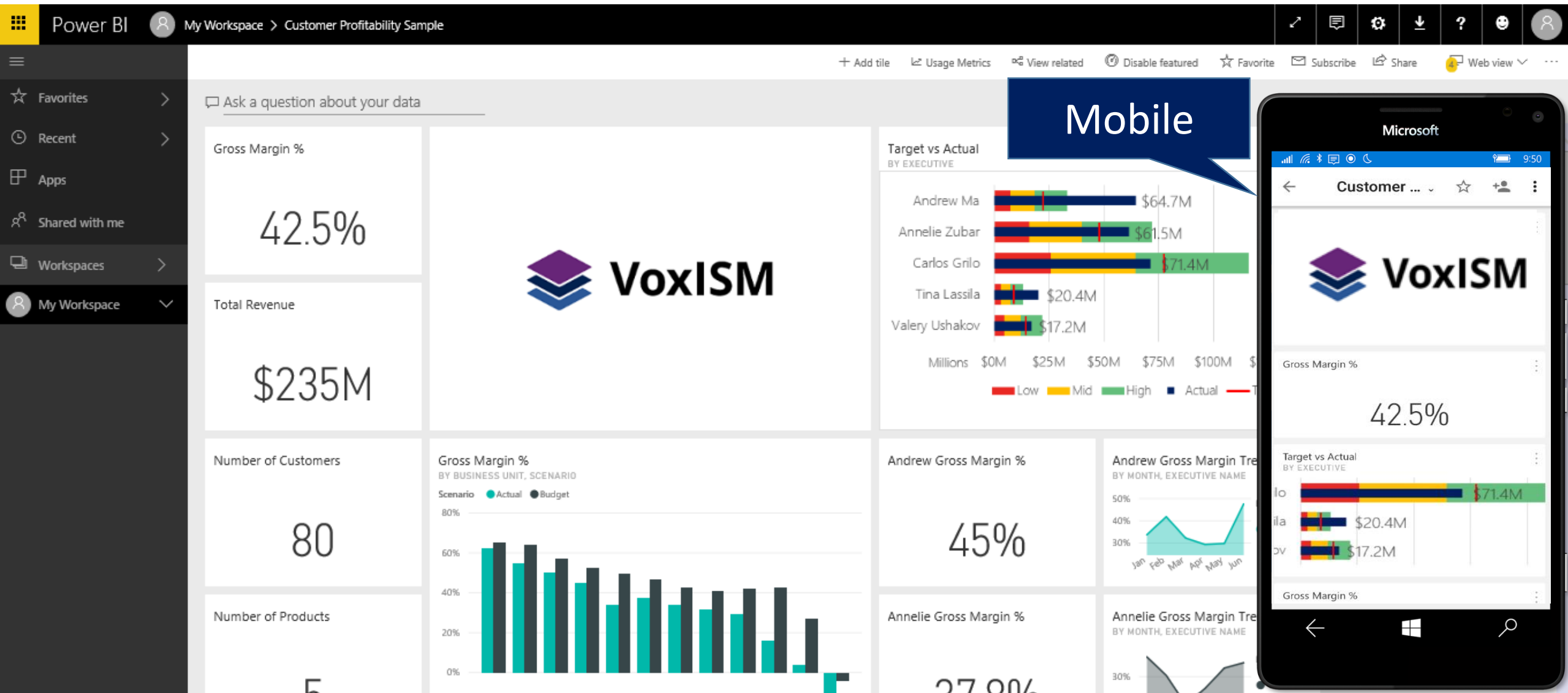
*"65% of Sale is done before talking with Sales Rep"*



- View the performance of your marketing initiatives and make adjustments.
- The measurement tools provide you the data you need to improve performance and increase ROI
- Monitor your cost per lead

# Marketing – All About The Numbers

# VOX ISM



# CASL: Canadian Anti Spam Legislation

# VOX ISM

This is a MUST HAVE. Up to a \$1 million penalty

**CONTACT INFORMATION**

Full Name*	Jim Heaton
Company	Ableman
Job Title	President
Role	Decision Maker
Email	jheaton@voxism.com
Business Phone	416 488 4899
Mobile Phone	416 459 4899
Fax	416 488 6309
Preferred Method of C	Any
Parent Contact	--
Address	36 Glengowan Toronto ontario M4N Canada

**Phone Calls (Regarding)**

Subject	Call From	Call To	Due ↓
Call Back - lvm	Sales Manager	Jim Heaton	6/4/2017 1
Call Back - lvm wanted to talked a...	Sales Manager	Jim Heaton	3/26/2017 .
Call Back - lvm	Sales Manager	Jim Heaton	3/14/2017 .
Call Back - Call back - lvm	Admin AtVox	Jim Heaton	3/13/2017 .

**Let's Get Social**

LinkedIn  
<https://www.linkedin.com/in/jim-heaton-8565462>

Skype ID  
jjeaton@voxism.com

Facebook  
[https://www.facebook.com/Vox-ISM-211059149081212/?hc\\_re](https://www.facebook.com/Vox-ISM-211059149081212/?hc_re)

Twitter  
[https://twitter.com/Vox\\_ISM](https://twitter.com/Vox_ISM)

**CASL (Canadian Anti-Spam Legislation)**

CASL Status	Confirmed
Permission Status	Express Consent
Date of Opt-In	1/1/2017 8:00 AM
Source of Opt-In	Self
Source IP Address	--
Source URL	--
Why Obtained	--
Bulk Emails	Do Not Allow

## Let's Get Social

LinkedIn

<https://www.linkedin.com/in/jim-heaton-8565462>

Skype ID

jjeaton@voxism.com

Facebook

[https://www.facebook.com/Vox-ISM-211059149081212/?hc\\_re](https://www.facebook.com/Vox-ISM-211059149081212/?hc_re)

Twitter

[https://twitter.com/Vox\\_ISM](https://twitter.com/Vox_ISM)

## CASL (Canadian Anti-Spam Legislation)

CASL Status	Confirmed
Permission Status	Express Consent
Date of Opt-In	1/1/2017 8:00 AM
Source of Opt-In	Self
Source IP Address	--
Source URL	--
Why Obtained	--
Bulk Emails	Do Not Allow



# Social Selling – Use The Available Tools

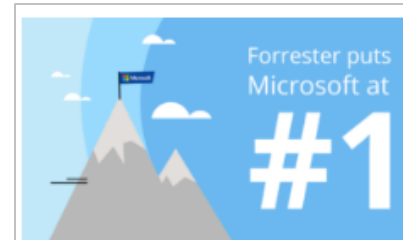
**VOX ISM**

The sales process is

**65%**

done before a customer even talks to the rep

- To get top-of-mind awareness you need 17 hits (nurture marketing)
- Social selling is integrated with your marketing campaigns.
- Use the social tools available
  - 3 tweets per day
  - 1 FB post per day
  - 1 LinkedIn post per day
  - 2-3 blogs per week



**BLOG**

## Microsoft Overtakes Salesforce.com – The Forrester Wave

POSTED AUGUST 14TH, 2017

This article was written by Wynand Roos, Co-Founder of The CRM Team, Fourways, Gauteng, South Africa. [1] Microsoft Overtakes Salesforce.com – Forrester They've led for decades. But things are now fading for Salesforce.com. Global agency Forrester recently put Microsoft ahead in Salesforce.com's traditional stronghold: sales software[1]. This is a big coup for Microsoft who have been...



[Read More »](#)

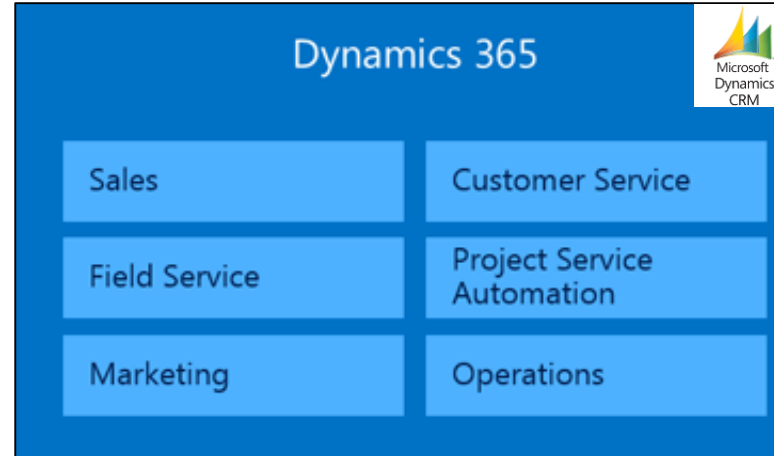
# Microsoft Manufacturing Software 2018

# VOX ISM

## Microsoft Dynamics NAV



## Microsoft Dynamics CRM



## Microsoft APP Source

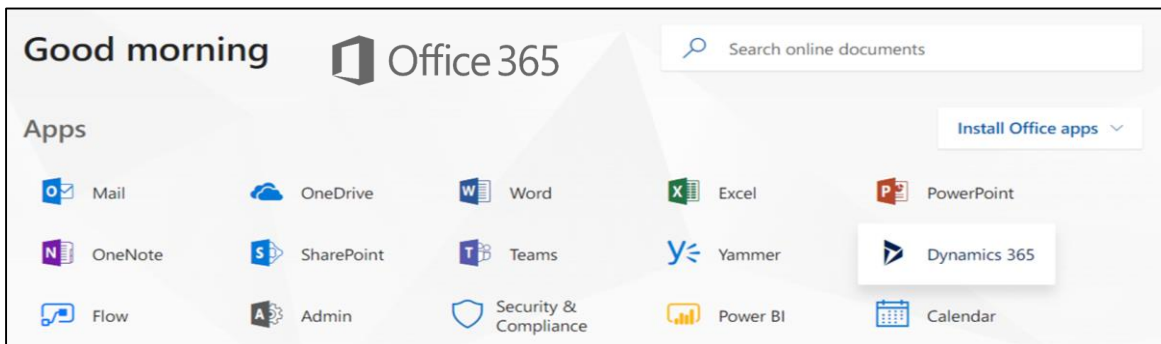
### Vox ISM Vertical Accelerator

helps organizations implement integrated solutions more quickly based on common industry configuration decisions. They are designed to deliver core industry application processes, reduce implementation times, costs and risks, for customers in specific vertical industries.

### Dynamics 365 Business Central

Connect your financials, sales, service, and operations with an all-in-one business management solution. Easily tailor and extend the application to meet your business or industry-specific needs.

## Microsoft Office 365



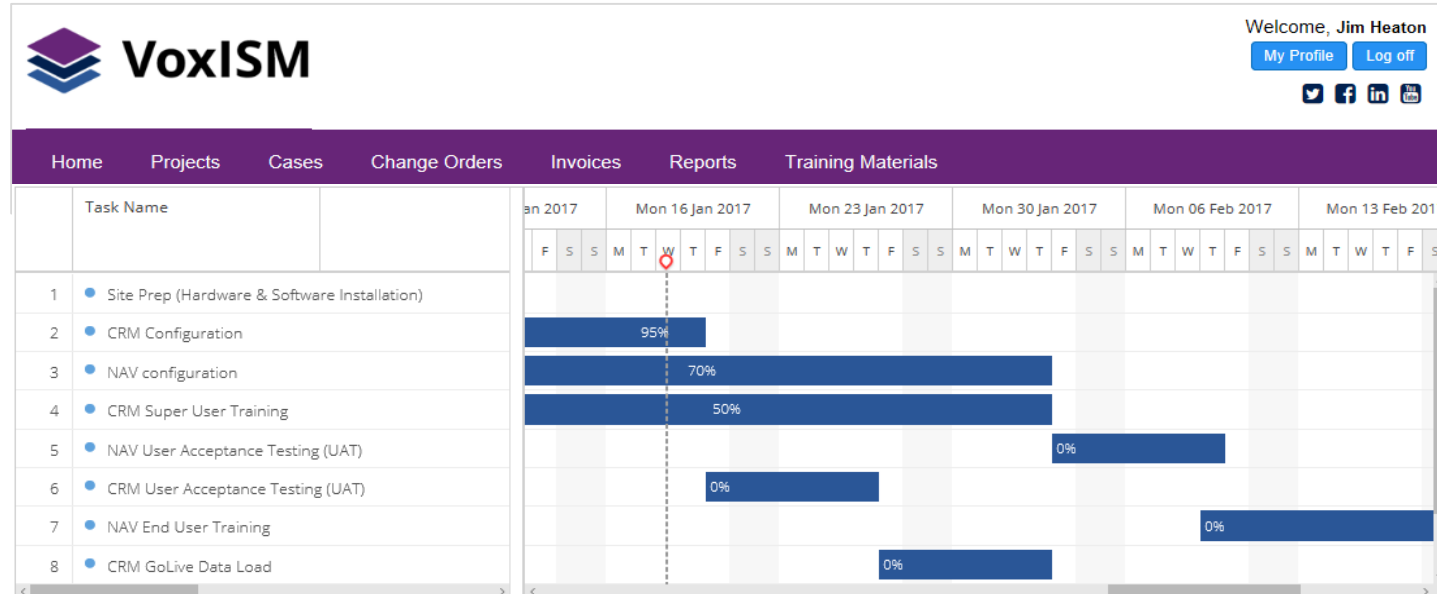
## The Power Of Choice



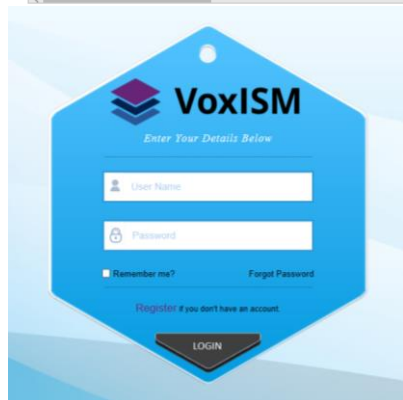
Cloud, on premise software, or a combination

# Vox ISM's Customer Service Portal

# VOX ISM



- Your Very Own Portal
- View Project Milestones
- Contact Details For Your Vox ISM Support And Project Management Team.
- Create And Submit Tickets For Support From Vox Ism's Expert Staff.



Communications

Picture	Connected To	Role (To)	Email	Phone No.
	Ed Michitsch	CRM Consultant	<a href="mailto:EMichitsch@voxism.com">EMichitsch@voxism.com</a>	705.431.1615
	Shawn Caskie	NAV Consultant	<a href="mailto:SCaskie@voxism.com">SCaskie@voxism.com</a>	
No Image	Trevor Reid	Technical Installation Consultant	<a href="mailto:TReid@voxism.com">TReid@voxism.com</a>	
	Emilia Arkadyev	Technical Installation Consultant	<a href="mailto:EArkadyev@voxism.com">EArkadyev@voxism.com</a>	905-695-2450
	Jim Heaton	Engagement Manager	<a href="mailto:jheaton@voxism.com">jheaton@voxism.com</a>	416-488-4899
No Image	Shane Kinsella	CRM Consultant	<a href="mailto:SKinsella@voxism.com">SKinsella@voxism.com</a>	

**Create Case**

Title \*

Priority Code \*

Description \*

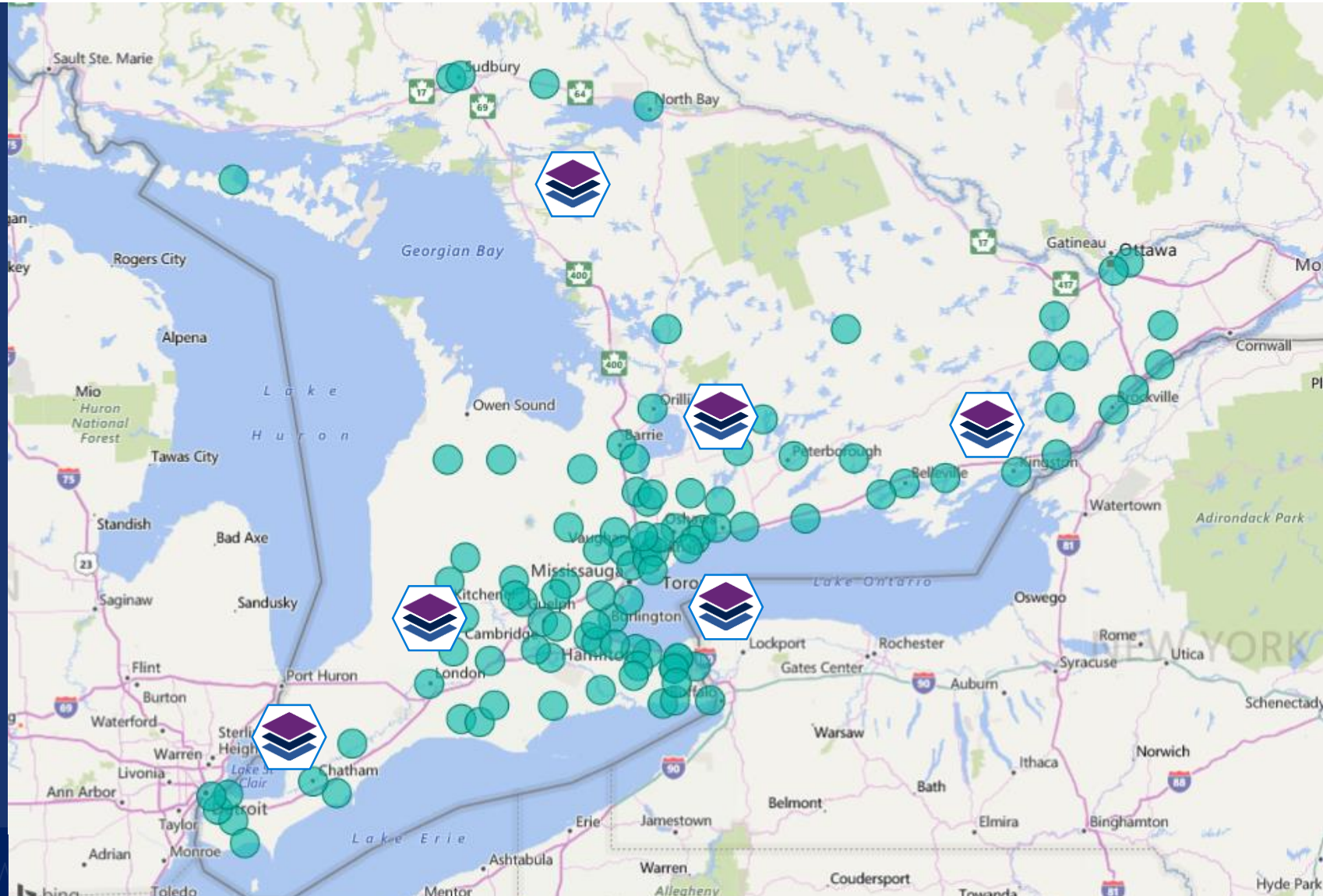


# Local Support - Introductions

# VOX ISM

## Employing Industry Experts

Plant managers, production planners, schedulers, machine shop owners, buyers, CFOs, controllers, sales managers, service managers, and more



# Vox ISM Customer Care Program

# VOX ISM

Vox ISM's Customer Care Program is designed to offer you access to support from Dynamics 365 specialists, updates, system reviews, product enhancements, and the peace-of-mind that your system is running at an optimum level of efficiency.

## SUPPORT

Vox ISM's Dynamics 365 Support Staff are ready to help M-F from 9-5 (Unlimited calls).

Weekly webinars provide continued education for your Dynamics 365 users.

Training (access to the Microsoft Learning Portal and the Vox Learning Portals).

2 Microsoft Support Tickets/Yr. A \$1,000 value.

## MAINTENANCE

Microsoft's Enhancement Plan annual maintenance.

Annual Dynamics System Review and Application Review from a Vox Technical Expert. A \$3,000 value.

We will load critical patches as required.

ISM Support.

## VISIBILITY

The customer portal gives you one location for all the information you need to run your project, get support for customer care, and access training materials.

Track project progress.

Enter support tickets.

Member of the Customer Reference Program. A \$1,100 value.

Microsoft  
Dynamics  
365





# Let Vox ISM Help Secure Your Funding Today **VOX ISM**

## **COJG Government Funding Made Easy** **(Get back 83% of your training costs)**

### **1 - The Funding: For Microsoft Dynamics Software Training – 100% Success Rate**

- 50% of direct training costs funded for companies over 100 employees
- 83% funded for companies with 100 or fewer employees
- Vox ISM provides our COJG application support services free with the assistance of Employment Ontario and COJG to complete your paperwork.
- up to \$10,000 per trainee is funded, up to 25 trainee's, or \$250,000
- Working you and the COJG Government agency reducing the turn around time from weeks or months to days

### **2 - Submitting and Approving Your Application – (the paperwork)**

- Vox will work with your local COJG and Employment Ontario representatives on your behalf
- They will meet with you and complete the online application for you
- They upload the application for you
- They attain the confirmation from the Ministry
- They acquire the final signatures from customer (visit you)
- Once proof of payment is received (Invoice from Vox ISM) the funding is released to the customer
- Vox has already completed the 6 templates required, these will be tailored for your request.



# Excel with Excel – October 17 – Webinar

**VOX ISM**

Learn how to use Microsoft Excel to increase profits, identify business process problems

During this webinar, we will demonstrate the most powerful reporting tools of 2018.

- Microsoft Excel Analysis
- Microsoft Excel Power viewer
- Jet Reports
- Power BI
- Artificial Intelligence (AI)
- Key Performance Indicators (KPI's)

## Details

**Date:**

October 17

**Time:**

2:00 pm - 2:45 pm

Th  
se  
Ho  
or

**Microsoft®**  
**GOLD CERTIFIED**  
*Partner*