AXtension project with Microsoft d365

AXtension is a suite of solutions designed to extend the functionality of Microsoft Dynamics 365 (D365) Finance and Supply Chain Management. These solutions address various business needs, such as document management, project planning, warehouse management, and accounts payable automation.

Key AXtension Modules

1. **AXtension® Enterprise Content Management**
   Streamlines document management by linking documents directly to transactions in D365.

2. **AXtension® Invoice Processing**
   Automates invoice processing and integrates with D365 accounts payable for streamlined workflows.

3. **AXtension® Kitting**
   Enhances warehouse operations with flexible product kitting options within D365.

4. **AXtension® Visual Planning**
   Facilitates project and resource planning with drag-and-drop interfaces.

5. **AXtension® Project Cost Control**
   Offers tools to track project expenses and maintain budgets in real time.

Planning a Project with AXtension and D365

1. Define the Project Scope

- Determine the business processes you want to enhance (e.g., document management, project cost control, etc.).

- Identify key stakeholders and gather their requirements.

2. Choose Relevant AXtension Modules

- Select the AXtension solution(s) that align with your business objectives.

- Evaluate if customization is needed based on your specific workflows.

3. Set Up and Configure D365

- Ensure D365 Finance & Operations or D365 Supply Chain Management is ready for integration.

- Check for compatibility between AXtension versions and your D365 environment.

4. Implement AXtension

- Install the relevant AXtension modules into your D365 environment.

- Configure workflows, templates, and settings specific to your needs.

5. Train Your Team

- Provide comprehensive training to your team on using the AXtension modules.

- Use sandbox environments for hands-on practice before going live.

6. Test the Integration

- Test AXtension functionalities in a staging environment to ensure smooth operation within D365.

- Identify and resolve any integration or workflow issues.

7. Go Live

- Migrate to the live environment with all configurations.

- Monitor system performance and user adoption.

8. Post-Implementation Support

- Set up a support plan to address user questions and technical issues.

- Evaluate performance metrics and ROI.

Benefits of Using AXtension with D365

- **Improved Efficiency**: Reduces manual tasks and automates workflows.

- **Better Collaboration**: Centralizes data for better visibility and access.

- **Scalability**: Modules can grow with your organization's needs.

- **Enhanced Accuracy**: Minimizes errors in data handling and processing.