THE DYNAMIC BUSINESS.

Industry-specific solution for IT and high-tech enterprises
SITE – an acronym for Solution for IT Enterprises – is fully integrated into Dynamics NAV. We have found ways to make Dynamics NAV simpler for SITE, like hiding modules (PPS is one example). Some NAV functions, such as those in the financial modules, are unchanged in SITE; others, such as order processing functions, have been enhanced for SITE. Where functions do not exist in Standard NAV – order disposition and helpdesk functions, for example – we have added them using Dynamics NAV’s own development environment.

**Target groups for our industry-specific SITE**

- Systems houses
- Systems integrators
- Software houses
- ISVs (independent software vendors)
- VARs (value-added resellers)
- VADs (value-added distributors)
- IT project service providers
- Service companies
- Professional services enterprises
Functional representation of SITE 2009
SITE is designed for companies that provide a combination of goods, services, and maintenance and support agreements. This mixture is found in many industries, but we had IT and high-tech enterprises particularly in mind when we worked out the specifics of the solution.

**Systems houses**
Systems houses provide hardware, standard software and services from a single source. They integrate the components into customer environments and work for both manufacturers and customers. SITE supports all processes for systems houses, from creation of sales quotes to automated logistics and on-site coordination of the flow of goods with service providers. Service processes are increasingly geared to ITIL.

**ISVs and software houses**
Software houses provide solutions specially developed for customers or produce standard applications of which many copies can be sold. Hardware and infrastructure are not always part of a job. Industry-specific software for such enterprises will cover everything from professional sales quotes through job organization support and post-installation service. Costing, budgeting, controlling and billing for jobs must include both standard internal software development jobs and customer jobs.

**Systems integrators**
Systems houses are often – but not always – systems integrators. Their main focus is on complex IT systems which they design and implement on-site. Product logistics is handled either directly by manufacturers or by distributors; the emphasis is on the highest-quality services for the recommended products, which are delivered turnkey. An industry-specific solution for systems integrators is of particular utility for managing resources and skills and for organizing software and hardware changes following ITIL guidelines.

**VARs (value-added resellers)**
In addition to providing resource and license management, a VAR wants to offer the customer added value by creating solutions that consist of multiple components. VARs customize software and (where necessary) hardware to suit the processes of the customer; after installation they oversee the day-to-day operation of their solutions. For purposes of internal organization they need a user helpdesk for incidents and problems as well as a way of making customizations transparent. For VARs, whether a support and maintenance agreement is successful depends on the bottom line of revenue from customer contracts and on the purchase costs of ISV contracts.
**VADs (value-added distributors)**
Value-added distributors have established themselves in special areas such as security. They pre-select products for VARs, systems houses or systems integrators and bundle them into a single solution. Their strength is in combining logistics for manufacturers with know-how for their associates, but not for end-customers. The processes surrounding the products require support in logistics, RMA processes for the manufacturers, license management and knowledge management.

**IT service enterprises / professional services**
Many IT enterprises, as associates of manufacturers or sales organizations or as subcontractors to large organizations, deal only with post-sales services. Often such professional service firms play a silent part in the processes of their customers. An industry-specific solution must control and bill for resources, manage a constantly changing installed base and keep it accessible. The work done with the customer is structured by service, support and maintenance agreements; logistics processes for both customers and vendors must use minimal resources.

"**Neighboring" industries**
It goes without saying that industry-specific solutions in other branches of industry will need to meet some or all of the same requirements as a solution designed for IT enterprises. Office equipment, alarm systems, conference systems, television technology, safety equipment – all these areas function with a similar product mix. Anyone active in these fields carries out jobs and provides service-requirements that IT enterprises also have and that an industry-specific solution must meet by its very nature.
Hardware—prices—availability
One central challenge for IT enterprises is dealing with the vast and ever-changing range of hardware that can be available for different prices from more than one source. SITE lets you maintain prices for "nonstock items" via ready-to-use interfaces for leading manufacturers and distributors. This can be automated and is done by scheduling simple imports, by independently using online connections (Microsoft BizTalk), by going through third parties (OneTrail) in real time or by utilizing purchasing platforms such as Compare & Procure or IT-Scope.

Software licenses
A range of different licensing models for software have emerged. From simple licensing models that treat software as merchandise with volume discounting to volume licenses, subscriptions, leasing models and software-as-a-service (SaaS) – all of these are met with in practice. Not only can all these models be represented in SITE, but there are also solutions for suppliers with an indirect business model that both serve their own partners and also require end customer data in the installed base (this might be because they invoice licenses via partners, but invoice maintenance contracts directly).

Linkage to distributors and manufacturers
In addition to item maintenance, distributors and manufacturers provide a paperless exchange of documents with partners. EDI and especially XML are the market standards here. SITE’s depth of integration means that not only orders and shipments but all document types including invoices are represented in the system. This facilitates logistics processes, offers price advantages and reduces errors in what were once manual processes.

Many manufacturers provide online configurators for their systems. The resulting configuration files are not only sent to vendors as purchase item lists, but are also imported into SITE – thus avoiding duplicate input.
Complex orders and disposition

Typically, the business of a systems house is jobs. This type of business is characterized by orders with many line items on the one hand and purchasing at special rates on the other. It often happens that some of the necessary hardware goes into the systems house’s own inventory and some goes directly from the vendor to the customer. So that locations and system configurations will be transparent later, SITE orders are broken down into logical units that remain transparent as configurations including all components (such as a server and all its parts or a workstation and its licenses). Goods are reserved for these units so that they are not incorporated into other orders, or so that it will be plain which components of a complex system are still missing. Above all, large orders become simple and clear and are processed with the use of workflows. SITE assists in an enterprise’s liquidity by making it easy to do purchasing not for orders as a whole but rather at the disposition level, and also by offering a way to manage advance payments and the like. A printer delivered at short notice is not procured until the last minute; a server that will be used for weeks is procured at the very beginning of the job.
The work done is central

Transactions with IT products are always demanding: the environment is complex, the products short-lived, the necessary knowledge highly specialized. There would be no long-term business success without the services provided by experts.

IT enterprises must be able to match employee knowledge with product requirements, convey the content and objectives of orders and provide the customer with documentation of work done. The more efficient this process is, the greater both customer and employee satisfaction will be.

Invoices and more

Invoiced time-and-materials services are the bread and butter of any IT enterprise. Many also do fixed-price work. A true accounting of total effort expended is only possible with reference to work actually done, and thus requires an honest and complete record of time worked by all participants. But in any business model there are also costs which do not appear on any invoice but which are important for evaluating a customer relationship: sales costs, internal costs, goodwill and warranty services. It should be part of the culture of any enterprise to want to know about the work done for each customer, job, order and contract, as well as by each employee.

Employees enter their time and effort directly in the system and document the degree of completion of any given task, thus making it easy to process the information.

Service = Knowledge x Time

The services provided by IT enterprises cover a vast range. Whenever specialists put their knowledge at the disposal of others, the entrepreneur is interested in how the time is invested. Knowledge and time feed into consultation and analysis leading up to an investment, make procurement, installation and shipping possible, form the basis for software design and development and secure customers’ investment after startup. The entrepreneur needs to know what tasks each worker performs most productively and what value is added. SITE provides specialized analyses for this purpose or passes the information to an OLAP cube.
Manage services

Service orders
People who provide service need more information to organize their work than is usually documented in a sales order. In addition to the customer, the site and the task, it must be possible to create a plan against which services actually rendered can be checked off. For consultants, trainers and coaches, SITE’s Service Order is a central tool.

Helpdesk—incidents—problems
Many IT enterprises provide access to their specialists through a formalized helpdesk or a call center. Following ITIL logic, calls are logged centrally or decentrally as incidents and / or problems, customers and their SLAs (service level agreements) are identified and an attempt is made to find solutions. Both time spent and solutions found are logged (in a knowledge database). Information from the installed base (configuration items) is used to clarify configurations and the context of a problem.

Software changes
Software companies break down their development projects into work packages with milestones, releases or project phases. The formulation of requirements, internal and customer-related documentation and scheduled test scenarios ensure quality in these kinds of projects.

Seminars
Seminars, both open and closed, are key for many IT enterprises. SITE Seminar, a separate module, utilizes all service and planning tools to let you create a simple workflow from planning to billing that requires no special knowledge.

Billing
Services can be billed from SITE modules for any SITE service document, address, customer and job and for any time period. Open entries are passed directly to financial accounting, where they continue to be managed. In the invoice or in their own analyses, customers get detailed itemizations of services directly from the system.
**Jobs in the IT industry**

As in all industries, jobs in IT are defined by a goal, a budget, start and end times and the need to distribute tasks to multiple resources. For SITE, the organization of a job begins with a sales quote and extends to individual work packages that are completed independently of the way the customer is billed for them. Movements of goods being purchased and sold are just as much a part of a job as postings in financial accounting. Thus the job becomes a reservoir of all the data from the individual modules, which continuously provide up-to-date information online.

**Fixed-price or time-and-materials jobs**

IT jobs are generally billed on either a time-and-materials or a fixed-price basis. In some cases a job is delivered regardless of the actual underlying time and materials; in others all job-related time and materials can be billed. SITE’s Job module can process either type, requiring only a setting in job master data. Services are rendered, documented in the system and billed in accordance with the order recorded in the system. The rules stored in the system either allow order volumes to be increased or make sure that they are frozen. Milestones and payment schedules are observed. WIP (work in progress) is determined if required based on postings to date.
Jobs in IT enterprises

- Sales quote calculation
- Job orders with milestones and activity content
- Automatic or manual job budgets
- Online job controlling
- Value added by resources and resource usage
- Degrees of completion for work packages and overall job
- Shipping and invoicing status
- Partially completed services (WIP)
- Time recording

Job organization

If jobs are broken down into work packages, the smallest unit is a task. Tasks can be defined within service orders, incidents, hardware changes or software changes. Multiple internal or external job partners can work on one job and can be centrally managed. Releases are planned and documented for internal software development. Employees working on a job find their assigned tasks in their personal cockpit and complete them, making a prompt contribution to the transparency of the job without duplication of input.

If you have tasks or appointments that are centrally managed in SITE, you can also use Microsoft Outlook: a bidirectional interface ensures that dates are synchronized.

Time recording for jobs

Employees can enter their hours in all documents related to a job, thus documenting the job's degree of completion. This can be done in individual service documents, on a summary input screen within SITE or using our webTIME modules.
Contracts: the essence of customer retention

Long-term contracts for support, service, maintenance and helpdesk are the goal of almost every manufacturer and reseller in the IT field. Such contracts ensure predictable long-term earnings. Contracts must not only be simple for a sales department to handle; they must also be readily implemented by those providing the services and must be suitable for invoicing. The customer should be able to see what he is getting for his money.

Customer contracts

SITE shows all continuing obligations with customers in the Customer Contract module. Whether payment under a contract is organized as a percentage of sales, as fixed prices for services or as a sliding scale according to SLAs, the SITE customer contract automates all these types of contracts so that workers are relieved of much of the work of managing them. Agreements concluded with customers are visible in all SITE modules and guide the work of the specialists.
**Vendor contracts**

Continuing obligations of an IT enterprise toward its own vendors are managed through vendor contracts. No matter whether the contracts deal with maintenance for the IT enterprise’s own software, telecommunications or insurance, SITE vendor contracts include all master data. A critical benefit arises especially when a customer contract results in a vendor contract being concluded with a vendor: not only can SITE automatically figure the profit margin for a contract, but it can also be used to incorporate incoming vendor invoices into liquidity projections and also to keep track of when they have been received as documents.

**Software-as-a-service and ASP**

One particular form of continuing obligation is finding more and more enthusiasts: leased and / or hosted software. The lessor or host bills dynamically for monthly costs according to use. SITE’s functions, both in sales and in contracting, include all those making it easy to apply this kind of business model.

**Contracts in financial accounting**

Contracts often run over a long term and are ideally billed yearly in advance. Many manufacturers start their contracts the moment a product is shipped and regularly invoice a year in advance. SITE includes routines which add contract revenue to monthly income statements, but which also control changes when there are cancellations or corrections. When contract volumes are high, many accountants and controllers are spared a considerable amount of manual work that must often be done outside the ERP solution.
Financial management as a central feature
You don’t have to utilize financial accounting to use Navision / SITE, but you’d be missing many advantages of an integrated solution. If helpdesk service comes to a standstill because the most recent services were not paid for by the customer or a vendor has been blocked, the information comes automatically from accounting to the support worker’s workstation. The standard Dynamics NAV financial management has been enhanced by our product specialists so that accounting experts from the IT industry feel in their element; SITE has an optimal counterpart to much of what they do.

From isolated application to integration
Because all processes are fully integrated, posting sales and purchase invoices automatically creates accounting entries and duplication of input is avoided. You can navigate back from any entry to the original documents.

These benefits are so significant that SITE customers persuade their external accountants to simply work on the customer system instead of continuing with external accounting, with all the duplication of information that entails. Accounting employees are essentially integrated into the broader processes of the enterprise, and the system is open to them to make their own determinations of where their figures and documents come from. Thus internal accounting is no longer an island within the enterprise, no matter whether it is a small company or group accounting.

Practical knowledge instead of program modification
Even if standard SITE is not able to meet all demands arising in practice, clever customizing can still fill many gaps. Whether it comes to intercompany settlement, showing results using another accounting method such as IFRS or representing multinational organizations, we have already worked out solutions to many such problems for special projects. A special team looking at the ramifications for SITE of changes in accounting and the legal environment works out solutions so that our customers will not have to devote their own resources to developing them.
Internal cost accounting and accounting for services
In larger enterprises, the use of cost center and / or cost unit accounting is routine. SITE customers also benefit from a separate module for Dynamics NAV. Because time worked is recorded for everyone who provides a service, SITE can of course tell you how much anyone does and for what cost centers; this information can then be used in internal accounting for services.

SITE enhancements in financial and management accounting
- Monthly contract accruals and deferrals
- Provisional balance for general ledger accounts
- Provisional balance sheet
- Balance sheet ratios with determination of key figures

Useful additions
- Business intelligence tools
- Cost center and cost unit accounting
- Travel expense accounting
- Liquidity projections

When cold statistics are not enough
Microsoft SQL Server is the database used by Dynamics NAV and SITE. This means you can use all the current tools to extract and process data for further analysis. It’s easy to use existing SITE functionalities to export data to Excel. If you need more, the SITE Excel Pivot Generator puts you completely in charge of the data you want to extract from SITE. If you have a business intelligence tool, SITE will provide cubes allowing you to do additional analyses. At the end of the process chain there might even be a representation of important results and key figures via a portal such as Microsoft Sharepoint Server.
Modern architecture
In 2009 Dynamics NAV was able to transition from the traditional two-tier architecture to a much more flexible three-tier architecture. While these facts provide specialists with a demonstration of the product’s sustainability, the effect on the day-to-day operation of the software is what is truly exciting: with the new architecture, a "Role Tailored Client" has become available, meaning that the application finally feels like all Office products and can be very flexibly adapted to the end user’s own requirements and preferences. If you are getting along well with the "old" client, you can use it in parallel with the new one. In recognition of its successful migration to the new architecture, SITE received Microsoft’s "Certified for Microsoft Dynamics" logo in February 2009. We were again one of the first industry solution providers to do so.

SQL Server
With the new version of Dynamics NAV, the old proprietary database is finally a thing of the past. The trend toward MS SQL Server has long been foreseeable in our industry and it is now becoming the standard technical base. Linked to this is the availability of all technologies related to both data extraction and data security, which are associated with SQL Server. For customers who wish to take care of their own IT, SQL know-how is now definitively indispensable.
**Microsoft Office**

Every Dynamics NAV release in recent years has pushed the integration of Microsoft Office further. The Role Tailored Client lets users open Microsoft applications within their personalized SITE or, as in the case of Outlook, lets them keep an eye on their e-mail. Data transfer from Dynamics NAV to Office applications has been further facilitated – and is of course also available for SITE modules.

**MSS:**

**Microsoft Sharepoint Server**

SITE’s data is all structured for business logic. But business processes create many documents that are not structured for databases. In the new Dynamics NAV we see Microsoft’s strategy of managing such data by linking it to Dynamics NAV in Sharepoint Server. This is also the precursor to a Sharepoint Client for Dynamics NAV, from which it will be possible to run parts of the application.

**Web services and BizTalk Server**

Hardly anyone uses SITE as an isolated, stand-alone system anymore. In many routine processes such as ordering from distributors, checking with manufacturers about availability or shipping to major customers, time and money can be saved by using communications technology to link SITE with these partners. The simplest method of exchange is to use files that are created by both partners and mutually imported. The high-end solution for communication among supply chain members is Microsoft BizTalk Server; but we also use it when a system consists of databases at different locations, for such purposes as intercompany business.

Dynamics NAV 2009 provides web services. This technology is also intended to allow data to be exchanged between applications without intervention by users, and to let you access and run functions outside SITE.
Our partners expand our horizons

The range of functionalities SITE provides has broadened over many years, yet in special areas it has been useful to engage partners that have developed their own SITE-related products. Here is an overview of important solutions created by our partners.

**Webshop**
Because Microsoft has no webshop for Dynamics NAV, many colleagues have developed their own connectors between leading webshops and Dynamics NAV so that any SITE customer can buy.

Our partner Qurius in Holland has not only developed its own connector for the Danish product ScriptServer, but has also enhanced the webshop so that it is optimally suited for SITE. This solution is available from Qurius to all partners.

**Business Intelligence**
If you are not satisfied with the kinds of analyses your system allows and are looking for business intelligence solutions, there are products on the market that use Microsoft SQL Server. Singhammer has had good experience with Cubeware and Evidanza products. We have developed SITE cubes with both, and these partners provide efficient tailor-made solutions in jobs for SITE customers.

**Distributors: communication and content**
The process chain between manufacturers / distributors and systems houses has been developing its own business model for some years. Purchasing portals, industry platforms and communication services providers define, normalize and enrich data and exchange formats. Here SITE offers a great many ready-made integration options.

A SITE solution by OneTrail exemplifies a foreign trend that has not yet arrived in Germany. OneTrail is the creator and operator of a product and document platform for the IT industry. Like familiar purchasing platforms, OneTrail maintains data for all important distributors, enriches it manually with content on products taken from a wide range of sources and, like our BizTalk solution, normalizes document exchange between manufacturers, distributors and IT enterprises. The price model is based on a one-time set-up fee and then a monthly charge. An all-around package for large businesses, completely integrated into SITE and again distributed and set up by Qurius.
Electronic stationery and digitally signed invoices
Comparatively small but excellent solutions create the possibility of printing from SITE directly onto digital stationery and giving SITE invoices in PDF format digital signatures so that the recipients of the invoice will have no problem with input tax deduction.

Payroll / travel expense accounting
Many add-ons created by colleagues are suitable only for a given domestic market, because national laws make a globally applicable solution impossible. Typical examples of this are payroll, travel expense accounting and dedicated HR modules. In Germany, SITE uses Comsol’s travel expense accounting, and Singhammer has developed a web component for it. For payroll, Singhammer uses Haveldata’s product, but in this case Singhammer has not developed its own functionalities.
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