



# DAXFO

Success Is Our Mission



Accelerating your  
business with

**CUTTING - EDGE**

technology

**COMPANY**  
PROFILE

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# Daxfo Technology

Success is Our Mission

We Ignite

- ***Vision***
- ***Fuel Innovation***
- ***Drive Excellence***
- ***Embrace Agility***
- ***Cultivate Endurance***

# About Us

At Daxfo, we are proud to be a leading global provider of Microsoft consulting services, specializing in Dynamics 365 Finance & Operations/AX, Customer Engagement/Customer Relationship Management, Business Central, Power platform and Azure.

Since 2017, we have built a reputation for delivering end to end, innovative, and timely ERP solutions that align with your unique business needs. With offices in Chennai, India, and Baton Rouge, LA, our team of industry pioneers and technology experts is dedicated to driving your success. We are deeply committed to the Microsoft ecosystem, ensuring exceptional service and empowering businesses with cutting-edge solutions and supporting over 40+ clients across industries . Your success is our mission!

At Daxfo, our mission is to redefine excellence in Microsoft services. We strive to provide exceptional service to our customers by providing innovative strategic services and tailored solutions.



## Our Mission



## Our Values



Our values are rooted in unwavering professionalism, ethics, and a commitment to empowering our client's competitive advantage.

Manufacturing



Retail



Supply Chain



Life Science  
& Pharmaceutical



Financial Services  
& Banking



Serving a Spectrum of **Industries**



IT Services  
& IT Consulting



Entertainment



Wholesale  
& Distribution



Real Estate

Our

# Solutions

*Our*

*comprehensive*

*solutions*

*include:*

**1.**

**Dynamics 365 F&O/AX**

**2.**

**Dynamics CE/CRM**

**3.**

**Dynamics BC/NAV**

**4.**

**Power Platform**

**5.**

**Azure Services**

# 1. Dynamics 365 F&O/AX



Streamline financial and operational processes.

Enhance visibility and control across your organization.

Optimize fiscal management and accounting.

To optimize the supply chain management and logistics, AWMS implementation.

I D E

## 2. Dynamics 365 CE/CRM



Enhance customer engagement and relationship management.



Streamline sales and marketing processes.



## 3. Dynamics 365 BC/NAV



Simplify fiscal management and accounting.



Automate business processes and workflows.



## 4. Power Platform



Use Power BI for analytics, Power Apps for custom apps, and Power Automate for task automation.



## 5. Azure Services



Leverage Azure Cloud for scalable infrastructure and Azure AI for advanced machine learning, Expertise in Azure Logic Apps, Functions, DevOps, SQL & Databases, Storage and Service Bus/ Event Grid.



# Our **Services**

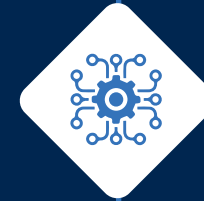
At Daxfo, we offer a comprehensive range of services designed to help businesses like yours succeed. Our services include:



**Implementation**



**Maintenance**



**Integration**



**Upgrade**



**Support**

# 1. Implementation

At Daxfo, we offer a comprehensive suite of Implementation Services designed to ensure your business thrives with tailored Microsoft Dynamics 365 solutions. Our services include:

**Requirement Gathering Workshops:** Collaborate closely with your team to identify specific business needs and project goals.

**Fit & Gap Analysis:** Assess and map the capabilities of Dynamics 365 against your unique business requirements to ensure a tailored solution.

**Configure, Customize, Deployment & Setup Dynamics 365:** Set up and deploy modules such as Finance, Supply Chain, and Customer Service, aligning the system architecture with your operational goals.

**Integration Services:** Seamlessly integrate Dynamics 365 with your existing systems, including ERP, CRM, and marketing automation platforms, ensuring data consistency and operational efficiency.

**Custom Workflows and User Interface Customization:** Tailor workflows, business processes, and user interfaces to improve usability and match your business needs.

**Custom Solutions Development:** Leverage Power Apps, Power Automate, and other tools to develop custom solutions like integrations, workflows, and advanced reporting that fit your unique requirements.

**Advanced Technology & Automation:** Incorporate the latest technologies and automation to enhance efficiency and streamline operations across your Dynamics 365 ecosystem.

**Configuration, Customizations, Localization, and Enhancement & Adaptation:** Fine-tune system settings, perform necessary customizations, and localize your solution to suit regional and global requirements, ensuring seamless business integration and BI support.

**Performance & Security:** Optimize the system's performance while ensuring top-notch security, keeping your operations running smoothly and securely.

## 2. Managed Services

Monitor system performance and troubleshoot issues as they arise.

Optimize system configuration for improved performance and user experience.



Perform regular updates and patches to ensure Dynamics 365 is current and secure.

Perform regular backups and ensure business continuity in case of system failure.

Provide ongoing support and maintenance to ensure Dynamics 365 continues to meet client needs.

# 3. Integration



Integrate Dynamics 365 with other systems and applications using various integration methods (e.g., APIs, web services, data import/export)



Develop and implement custom integrations using Dynamics 365 integration tools (e.g., Power Apps, Power Automate)



Integrate Dynamics 365 with third-party services (e.g., payment gateways, social media platforms)



Ensure data consistency and integrity across integrated systems.



# 4. Upgrades

Test and validate upgraded systems to ensure functionality and performance.



Provide training and support to ensure users are familiar with new features and functionality.



Assess and mitigate potential risks and impacts on existing customizations and integrations.



Develop and implement upgrade plans to minimize downtime and business disruption.



Upgrade Dynamics 365 to the latest versions .



**UPGRADE**

# 5. Support

At Daxfo, we provide comprehensive 24/7 support and production services to ensure that your Microsoft Dynamics 365 and AX Ecosystem operate seamlessly. Our services are designed to cover every aspect of system management, providing technical, functional, and production-level support.

We offer centralized platform "Daxfo Support Portal" where clients can "Raise support tickets, Track the ticket status and Resolution progress"

Multi-Level Support (Level 1, 2, and 3):

We offer tiered support to address a wide range of technical and functional needs:

## Incident Resolution



Quick troubleshooting and error fixing to resolve immediate issues and minimize downtime.

## Problem Management



In-depth root cause analysis and Implementation of long-term solutions to prevent recurring problems.

## Technical Guidance



Offering best practices, configuration advice, and system optimization for peak performance.

### ***Multiple Support Channels***



Access our support via phone, email, or online portals, ensuring timely assistance.

### ***Escalation to Advanced Support***



For complex cases, we escalate issues to specialized teams or Microsoft, ensuring fast, expert-level resolution.

### ***Environment Monitoring***



Continuous system monitoring to detect and resolve potential issues before they affect operations.

### ***Failure Recovery***



Swift recovery protocols in case of system failures, ensuring business continuity with minimal disruption.

### ***Security & Access Management***



Management of security protocols and access controls to safeguard data and system integrity.

### ***AX Functionality Support***



Functional and technical support for Dynamics AX systems, ensuring they meet your business requirements.

## *Patches & Service Packs*



Regular updates and patch management to keep systems secure and up to date.

## *Performance Tuning (Reactive)*



Real-time system optimization to improve performance and resolve any bottlenecks.

# Daxfo's Product for D365 F&O



## » Before the update :

### *Uploading files used to be a repetitive and time-consuming task :*

- ❗ Files had to be selected one by one, leading to unnecessary clicks.
- ❗ File types had to be manually identified, increasing the risk of errors.
- ❗ Managing large batches or mixed file types (images, PDFs, docs) took a lot of time.

## » After the update :

### *With the new Drag & Drop upload feature :*

- ❗ Just drag and drop your files directly into the system – no extra clicks.
- ❗ Upload multiple files in one go, regardless of file type.
- ❗ The system auto-detects and categorizes files no need for manual tagging.

# Our Collaborative Framework



Daxfo's  
Team Structure



Solution  
Architect - 4



Functional  
Lead - 4



Functional  
Consultants - 11



Application  
Consultants - 4



Technical  
Lead - 7



Technical  
Consultants - 42

# Success Stories

Our success stories highlight our expertise in delivering tailored solutions that meet our clients' unique needs. From streamlining HR migration to integrating Dynamics 365 F&O and CE, API & Third-party Integrations, Power BI Implementation, Advanced Warehouse Management System (AWMS) and Docentric Reporting Enhancement for D365FO. Our solutions have enabled our clients to achieve significant benefits.

# Client Spotlights

## 1. Streamlining HR Migration with Daxfo

### Problem :

One of our customers has to migrate its standalone HR app due to Microsoft's discontinuation after Dec 31, 2023.

### Solution :

Daxfo sprang into action when our customer approached us for this new journey during Mar-Apr 2023, conducting a thorough analysis, meticulous preparation, and rigorous testing to propose a cutting-edge migration solution, ensuring a seamless shift of the HR app into Dynamics 365 (D365). This paved the way for a flawless migration plan, guaranteeing uninterrupted HR operations.

### Outcome :

Daxfo has successfully migrated the production environment into finance and operations infrastructure.



## 2. Dual write Integration between F&O and CE

### Problem :

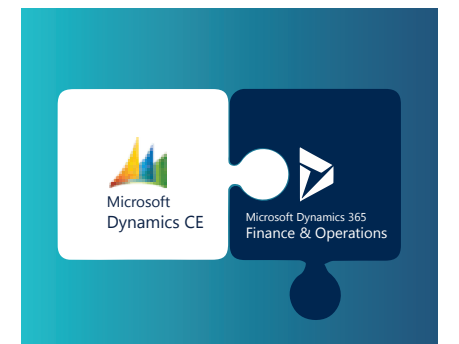
One of our customer has to integrate their existing CE with F&O to maintain finance data.

### Solution :

Our customer monitor sales process in D365 CE and wanted to maintain financial side in D365F&O. Daxfo suggested and integrated both the system using Dual write feature and fulfilled customer requirement.

### Outcome:

Daxfo has successfully integrated D365 F&O and D365 CE using Dual write.



## 3. API & Third-party Integrations

### Problem :

- Inconsistent data flow, limited visibility and complex authentication & security.

### Solution :

Daxfo has implemented various integrations to the client based on their requirement and their data volume using various integration services like logic app, Fabric, synapse, azure log analytics, function app etc.

### ***Power Automate + Synapse***

- **Challenge:** Integrate order, inventory, and pricing data from a third-party system into D365F&O
- **Solution:** Implemented Power Automate flows for real-time data sync, backed by Synapse for scalable data processing
- **Outcome:** Streamlined operations with accurate, up-to-date data across systems

### ***Recurring API Integration***

- **Challenge:** High-volume order data from external systems with limited visibility into sync errors.
- **Solution:** Deployed recurring Data Management APIs to automate ingestion and enable direct error monitoring within D365 F&O.
- **Outcome:** Improved reliability and transparency, empowering users to self-monitor and resolve issues efficiently

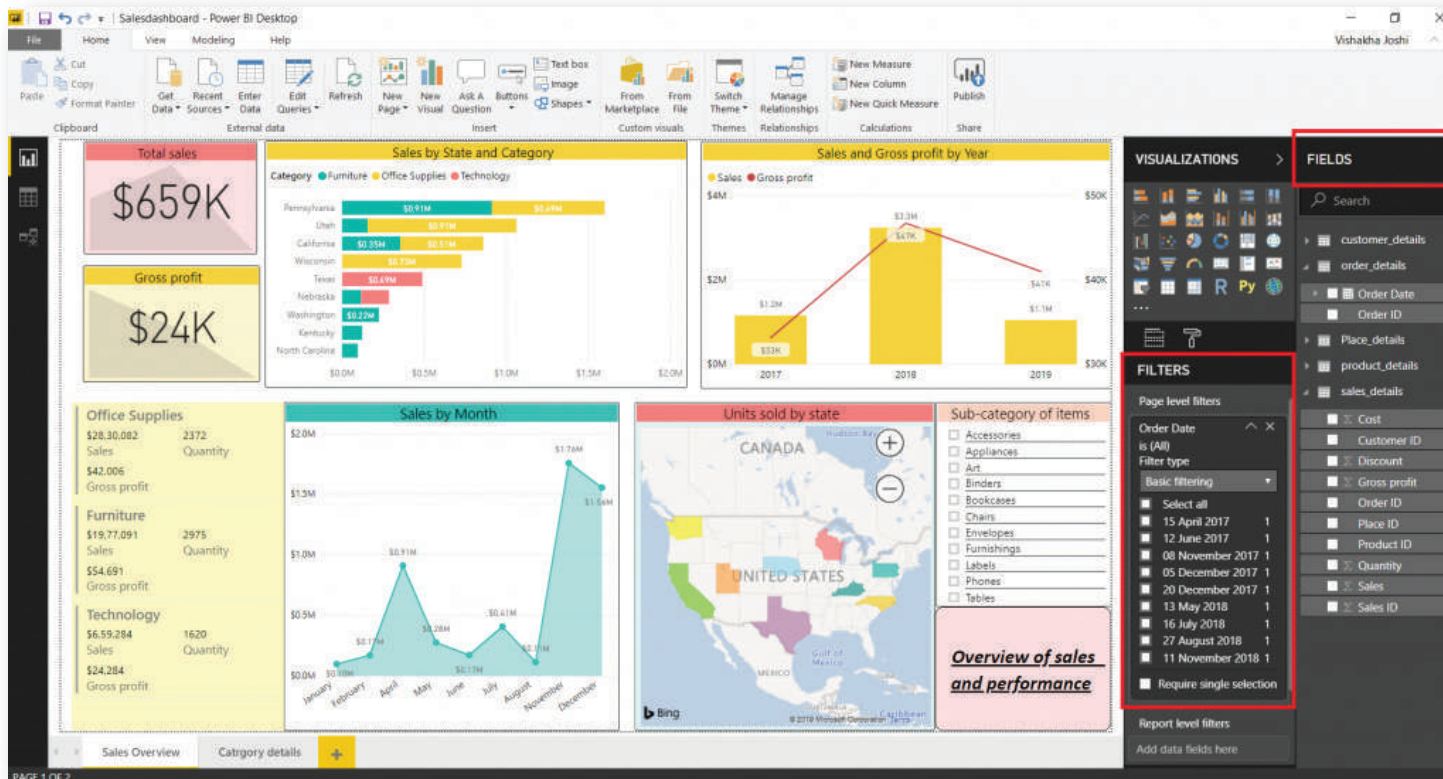


# 4. Power BI Implementation

The customer faced limitations in forecasting future sales using standard reports that relied solely on previous financial year data. These reports lacked flexibility, dynamic filtering, and visual clarity, making it difficult to project future trends accurately.

**We developed a custom Power BI report with the following enhancements:**

Advanced Filtering Options, Interactive Visuals, Dynamic Time Intelligence and User-Friendly Interface which results in Improved Forecast Accuracy, Faster Decision-Making, Enhanced User Adoption and Strategic Planning Support.



## 5. Advanced Warehouse Management System (AWMS)



*Manual tracking leads to errors in stock levels., Lack of real-time data makes it hard to monitor inventory movement, order status, and warehouse operations., Increased risk of wrong shipments or missed delivery deadlines., Manual workflows require more staff and time and higher storage costs.*



### Challenges

### Solution



*Daxfo successfully implemented an Advanced Warehouse Management System (AWMS) for a U.S.-based client, transforming their warehouse operations. The system enabled real-time tracking (support barcode scanning) of item movements, streamlined inventory control, and improved overall supply chain visibility.*

*This automation significantly reduced manual effort and errors, making warehouse tasks faster and more accurate. Barcode scanning with Zebra labels simplified daily operations, saving time and labor.*



### Outcome

# 6. Docentric Reporting Enhancement for D365F&O



## Challenges

Limited flexibility in designing and customizing business documents.  
High dependency on developers for even minor report changes.  
Lack of visual design tools, making it difficult for business users to contribute to reporting tasks like invoices, purchase orders, and shipping labels.

## Solution

Daxfo implemented docentric, an advanced reporting solution that integrates seamlessly with D365F&O and which results in reduced development dependency : Business users could independently manage and update report templates, faster turnaround and enhanced document quality, operational efficiency and high user satisfaction.

123 Coffee Street  
Suite 300  
Redmond, WA 98052  
USA

VAT: 991234  
Email: info@docentric.com  
Phone: +386 31 331 854  
Fax: +386 31 331 855

Sales Order no. 000003  
Delivery date: 1/15/2011

CUSTOMER  
Contoso Retail San Diego  
456 Peach Road  
San Diego, CA 92114  
USA

| Description                       | Quantity | Unit | Price per unit | Line amount    |
|-----------------------------------|----------|------|----------------|----------------|
| 1. Mid-Range Speaker              | 16       | ea   | 480.00 USD     | 7,680.00 USD   |
| 2. Mid-Range Speaker 2            | 24       | ea   | 500.00 USD     | 12,000.00 USD  |
| 3. Acoustic Foam panel            | 100      | ea   | 37.00 USD      | 3,700.00 USD   |
| 4. Standard Speaker               | 18       | ea   | 220.00 USD     | 3,960.00 USD   |
| 5. Speaker cable 10               | 50       | ea   | 500.00 USD     | 25,000.00 USD  |
| 6. High End Speaker               | 16       | ea   | 2,000.00 USD   | 32,000.00 USD  |
| 7. Television M120 37" Silver     | 50       | ea   | 350.00 USD     | 17,500.00 USD  |
| 8. Projector Television           | 30       | ea   | 3,750.00 USD   | 112,500.00 USD |
| 9. Television HDTV X590 52" White | 20       | ea   | 2,890.00 USD   | 57,800.00 USD  |
| 10. Surround Sound Receiver       | 30       | ea   | 450.00 USD     | 13,500.00 USD  |

Total: 285,640.00 USD

Preview Language: **ENU**

Sales Order no. @SalesId  
Delivery date: @DeliveryDate

CUSTOMER  
@CustomerName  
@CustomerAddress

| Description | Quantity  | Unit       | Price per unit | Line amount |
|-------------|-----------|------------|----------------|-------------|
| 1. @Name    | @SalesQty | @SalesUnit | @Price @CC     | @LineAm @CC |

Total: Sum(@LineAmount) @CurrencyCode

Data Source: Schema  
MainData  
SalesTable  
AddressRefRecid  
AddressRefField  
AutoSummaryModuleType  
BankAccount\_LV  
BankCentralBankPurposeCode  
BankCentralBankPurposeText  
BankDocumentType  
CaseTagging  
CashDisc  
CashDiscBaseDate  
CashDiscBaseDays  
CashDiscPercent  
CommissionGroup  
ContTarget\_IP  
ContactPersonId  
CountyOrigDest  
CovStatus  
CreditCardApprovalAmount  
CreditCardAuthorization  
CreditCardAuthorizationError  
CreditCardCustRefId  
CreditNoteReasonCode  
CustBankAccount\_LV  
CustAccount  
CustGroup  
CustGroupID  
CustomerAddress  
CustomerName  
CustomerRef

Element Tree  
Body  
SalesId  
DeliveryDate  
Name  
SalesLine  
SalesPrice  
SalesCity  
SalesUnit  
SalesCode  
LineAmount  
CurrencyCode  
SalesLine  
CurrencyCode  
CustomerName  
CustomerAddress  
Header (First Page) - Section 1  
SalesId  
SalesCity  
SalesUnit  
SalesCode  
CustomerName  
CustomerAddress  
Properties

# Testimonials...



"Grateful for the professional D365 services provided. Demonstrated excellence, patience in educating our team on best practices, qualities of a trusted partner."

**By Eric**

IT Manager,  
Manufacturing Industry, USA.



"Our exceptional collaboration with Daxfo stands out due to their invaluable input on solutions, best practices, and constructive challenges. It's more than task completion; it's nurturing open dialogue and meaningful discussions."

**By Pantovic**

H & M, Sweden.



"DaxFo has been a great resource!"

**By Andrew**

Director of IT, Danimer



"Having worked with DAXFO for many years and the team have consistently gone above and beyond to service our business. They have guided us through numerous challenging circumstances, enabling us to successfully deliver complex and mission-critical programs."

**By George**

Group IT Manager, B&D.  
Australia.



Daxfo is a highly valued partner!"

**By Jay**

IT Manager, DIX  
Manufacturing industry, USA

# Conference Sponsored



# Conference Sponsored



Gold  
Microsoft Partner

From Vision to Victory of your business  
Discover the Magical support of DAXFO

Our Services

Our Solutions

WHY CHOOSE US?

INDUSTRIES

## Turning Visions into Reality: The Power of Our Services

Explore how our services turn  
your dreams into tangible  
achievements, one service  
at a time.

Unleash the  
Power of  
Partnership



## Daxfo's participation at the Dynamics Minds Conference 2024.

DynamicsMinds Sponsors and Partners

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Platinum Sponsors

Partner Sponsors

Microsoft

DAXFO

## SERVICE REDEFINED: ELEVATING EXCELLENCE IN EVERY INTERACTION

We go the extra mile to redefine service standards,  
providing you with an unmatched experience.

📍 Slovenia, Europe.

# Global Reach



 *Daxfo's Locations*

 *Global Clients*

**Shape Your Future, Let Us Get Started Today!**



***info@daxfo.com***



***www.daxfo.com***



***Greeta Tech Park, phase-1, 2<sup>nd</sup> floor,  
North wing #96, VSI Functional, Industrial  
Estate, Perungudi, Chennai – 600 096, India.***



***Airline Towers, 9800 EAST,  
Airline Hwy, Baton Rouge,  
LA 70816.***



# Our Work Culture

*Chennai, India.*





## Branch premises

*LA, USA.*



The image features two large, overlapping teal geometric shapes in the corners. The top-right corner has a light teal shape with a darker teal shadow underneath it. The bottom-left corner has a dark teal shape with a light teal shadow underneath it. The text "Thank you" is centered in the white space between these shapes.

*Thank you*