Consultancy Competence

At ProFacto A/S we have always picked our consultants carefully as we want to provide the best and most personal service to you as customer.

Empowered with our individual skills we are able to dive in-depth understanding your business, provide coaching and ensure high quality in our common projects.

We are not looking for a quick win but for a long-term relationship. We are using best practice when implementing Dynamics NAV that is in all processes throughout the entire project.

Basis for this is not tools and features but rather communication and a sound relationship. First we need to have a common goal and matching of expectations then we can formalize the procedures.

Our goal is to implement projects to affect standard Dynamics NAV as little as possible. The output of this is reduced cost and risk on future upgrades. That means, that companies who tend to upgrade more often adopt new features and functionalities faster and thereby obtain greater value of the maintenance fee.

May we welcome you in safe hands?

About ProFacto A/S

ProFacto A/S was founded in 2004. Our focus was to create a company with strong focus on quality and honesty and thereby become the preferred partner within Dynamics NAV. We can assist you with all your Microsoft Dynamics NAV challenges - and for that matter with all previous versions of Navision. We can also help customers who want to change to Dynamics NAV from another ERP system.

Navigator, Financials, Attain - we know them all

Since the mid 80's Dynamics NAV has had many names and versions. Our consultants have thorough knowledge of these versions. We are experienced with all standard functionality as well as various add-ons. We are market leader within manufacturing and inventory management, including item tracking. That's why we keep delivering our expertice to Microsofts european headquarter for development of Dynamics NAV. We can literally assist all types of companies.

We operate on a daily basis in both small size and large companies both locally and abroad. We are familiar with the often rigorous auditing and validation conditions that companies comply to (e.g. ISO, FDA, SOX etc.). We keep a critical focus delivering quality in all processes of our work.

Microsoft Vendor

ProFacto assists on an ongoing basis Microsoft's European development centre with the development of future versions of Microsoft Dynamics NAV. We have done this since we were established in 2004.

Microsoft Dynamics NAV has a long history. Some of the success factors for the Dynamics NAV are all the partners and the number of industrial solutions for Dynamics NAV (more than 200). It is always possible to find a new partner for Dynamics NAV. This is properly the best insurance a customer can get. If a customer has special needs there is a good chance that a certified solution exists that can be used either directly or as a base for this. All together this lowers the risk and cost.

ProFacto A/S - welcome in safe hands

We are a modern Microsoft Dynamics NAV partner with highly skilled consultants and experience dating back to the earliest versions of Navision.

Microsoft GOLD CERTIFIED Partner

"ProFacto has proved its outstanding core competencies within manufacturing. I don't doubt that at all"
Peder Irgens Seidler, BISCA A/S

Advanced Data Management
Dynamics NAV Security and control at field level

ProFacto A/S is a Gold certified Microsoft Dynamics NAV partner with highly educated consultants carrying many years of experience. Our customers range from small size to large international businesses. ProFacto regularly assist Microsoft in the development of future Dynamics NAV versions.

Advanced Data Management

The overall purpose of Advanced Data Management is to ensure data consistency and reliability. This is done through a number of approaches

- Ensure that data can only be modified by users who have responsibility for that data
- Setting up warnings/notification for critical values to avoid typing mis takes
- Defining workflows to ensure a structured approach to data entry and verification when tasks pass through different stages
- Defining default values and settings for master data to ensure that all relevant information is entered when new records/subjects are created
- Providing easy overview of current user permissions and settings to allow fast and consistent reaction to changes in responsibilities or system structure.

The solution is structured as a generic toolbox containing four modules

- Field Permission
- Initial Value
- Prompt Change
- Permission Card

The modules are briefly described below.

Field Permission

When setting up user permissions, the goal is that access to data should accord with the responsibilities of the users. However, data permissions in standard NAV are not granted on a detailed level but rather to blocks of data, some of which might not be relevant to the specific user. This implies that most users will end up having data access which extends beyond their responsibilities.

Benefits

- Permissions can be assigned on a detailed level
- Documentation of permissions.
- Initial value control when a record is inserted
- Issue warning when vital data is changed
- Extend test or functionality without changing standard objects in Dynamics NAV
- Workflow opportunity for data entry
- Easy installation
- Insignificant upgrade cost
- Trigger option for advanced use

Advanced options

Apart from the out-of-the-box functionality, the solution offers a wide range of options for obtaining more advanced behaviour.

The system offers trigger functionality which allows call of specific code functions when certain events occur.

The solution comes with predefined functions that can be used to dynamically manage visibility/ editability of fields on a form based on the user's field permissions

Microsoft GOLD CERTIFIED Partner | Microsoft Dynamics

"I beleive this solution is relevant to about 80% of all Dynamics NAV customers. As an alternative you might keep your quality of data based on employees that never make mistakes" **Peter Valentin-Hjorth, Teknik- og Miljø, Københavns Kommune**

Thomas Stryhn,
Managing director, partner

Genesis

The development of **Advanced Data Management** has been a long process in cooperation with different customers with different needs.

Purpose for some is to have a tool for master data management (MDM) where others needed to prevent fraud because they were complying to Sarbanes Oxley (SOX). Some did just want to prevent users from making mistakes that can have unforeseen consequences.

We have seen users by accident make changes that caused a lot of trouble and also changes that had economical consequences.

We have made a "roadmap" for development and have planned to certify this. It is implemented in the worldwide and Danish localization of Dynamics NAV.

We plan to localize this to other countries as well as newer versions of Dynamics NAV.

Requirements

- Dynamics NAV version 5.0 or later
- Change Log (Granule ID 30880) - must be activated

Example 1

The purchaser needs access to the master data for Item. However this permission also gives access to the VAT Registration No. of the item even though the maintenance of this field logically belongs to the finance department.

Example 2

In many cases, each sales person is responsible for maintaining a separate set of customers. However, permissions will give the sales person access to do modifications on all customer cards regardless which sales person, the customer belongs to.

The Field Permission module allows you to define permissions on and below field level, hereby making it possible to solve these issues; the purchaser will not be allowed to modify VAT Registration No. and the sales person will only be allowed to modify data on customers belonging to himself.

Initial value

When a new instance of master data (e.g. Item, Customer, or Account) is created most fields will be empty and it is the user's responsibility to ensure that all relevant fields are filled in with a correct value. Failure to do so might lead to system errors and possibly the generation of invalid transaction data.

The Initial Value module allows you to define default values for fields hereby ensuring that all new instances will be born with all critical values defined. The values can be defined with interdependencies so that the default values for some fields will depend on the values of other fields.

Furthermore, the Initial Value module can be used to define rules, e.g. ensure that the instance is automatically marked as blocked until a certain verification process has been completed.

Prompt Change

In standard NAV changing a field value is easy, which makes the system very efficient to work with. However, in some cases changes are made by mistake, e.g. accidentally overwriting or blanking a field.

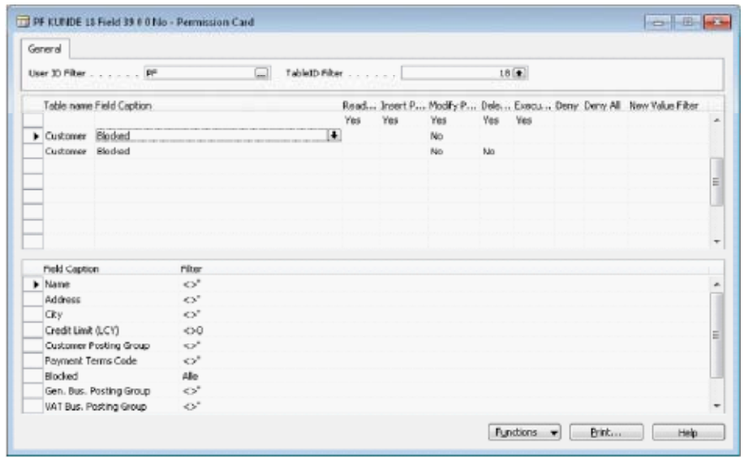
Using the Prompt Change module you can define notification messages for critical fields that will be invoked when a value is changed. The notification will inform the user of the change and offer the possibility of aborting. The setup can include rules for when to invoke the message, e.g. only notify if the old value is different from blank.

The module furthermore offers a facility for setting up post-processing, e.g. prompting the user if the changed value on the customer card should also be changed on the open orders for this customer.

Microsoft GOLD CERTIFIED Partner

"The NAV consultants at ProFacto understand how to spell out our pains and to determine what to do first. We had a really good dialog"
Torben B. Madsen, Holmegårdsparken

Advanced Data Management
Dynamics NAV Security and control at field level



Permission card provides an overview showing permissions for users in Dynamics NAV. Both table and field permissions are shown.

Permission Card

"Which users have permissions to change the Credit Limit on the Customer card?"; it will take a lot of investigation to conclude on this in standard NAV.

The Permission Card module gives you this answer straight away. It provides a complete overview of the user's table permissions as well as the restrictions that have been imposed via the field permission setup.

Apart from providing printout facilities for generating reports, the Permission Card comes with integration to Excel, making it possible to document users' access rights in spreadsheets.

Technical structure

The integration between standard NAV and Advanced Data Management is obtained through modifications in only two standard objects in NAV, the Change Log Management codeunit (423) and the Excel Buffer table (370). The fact that the level of modification is so limited means that the solution is very fast and easy to install.

All behaviour of the solution is obtained and managed through data setup; no code modifications are needed as part of this.

Owing to the minor of code changes the cost of future upgrades of NAV will not be affected by the presence of Advanced Data Management in any significant way.

Demo

We recommend a visual demo to achieve a broader understanding of the possibilities offered by the solution. If you have specific requests regarding this product we will try to incorporate this in the demo.

Supply Chain Management

ProFacto A/S has core competencies with SCM:

- Planning, MRP & Capacity
- Order management
- Manufacturing
- Purchase Management
- Inventory Management
- Distribution, advanced logistics
- Warehouse Management
- Forecast (Demand Planning)
- Inventory tracking
- Cost price management
- Inventory & manufacturing costing
- Integration to finance

Other competencies

- Financial Management
- Payment Management
- LESSOR Payroll
- CRM
- Sales & Marketing
- elfaktura Pro (e-invoicing)
- ExpandIT Webshop & Launch Utility
- Jet Reports (Reporting)
- EDI
- Service Management
- Analysis & project management
- Upgrade and data migration to other systems
- SQL Server
- Business Intelligence (Bi4Dynamics)
- Scorecarding & Performance

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"There was no doubt that the consultant had many years of substantial knowledge with manufacturing. He asked good and critical questions". **Dan Munkholm, GN Netcom A/S**