



DeMax - Dealer management solution on Dynamics AX

DeMax

The automobile market today is a buyer's market; putting demands on the automobile dealer to innovate and delight the customer in not only to attract them, but also retain them. The focus today, is on innovation, customer satisfaction, value-for-money, responsiveness, quality and support. In this scenario, there is a strong need for integrated information, accessibility of information, and operational efficiencies to achieve cost reduction and effective decision-making.

DeMax is a comprehensive dealer management vertical that has been built on the Microsoft Dynamics AX. DeMax brings to the table complete functionality to handle the core business and support functions for an automobile dealership along with benefits of Microsoft such as advanced technology, ease of use, complete integration, scalability and flexibility.

HIGHLIGHTS

- Complete Coverage
- World-class solution on Dynamics AX
- Integrated
- Extensible
- Latest Technology
- Web & eCommerce
- Commerce Gateway

BENEFITS

- Total Integration
- Operational efficiency
- Availability of vital information, when you want it.
- World-class tech support, from the world's no. 1 company; Microsoft.
- Freedom to innovate.

Introduction

DeMax handles all the core business functions of the dealer such as CRM, Vehicle Sales, Vehicle Service and Workshop management, Inventory and spare parts management and Purchases. DeMax also handles support business functions such as financial management and human resources management.

Apart from handling the business functions, DeMax also provides analytical tools and analysis reports in the form of business analytics, CEO desktop and host of analysis reports. DeMax also enables the automobile dealership to connect with its employees, customers and suppliers over the Internet through commerce and user portals. DeMax works both on Oracle as well as Microsoft SQL databases.

Modules

Financial Management
Trade-in Vehicle Management
Service & Workshop Management
CEO Desktop & User Portal
Inventory Management & Control
Order Processing
Sales Force Automation
Marketing
Human Resources Management



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Customer Relationship Management

In an extremely competitive business scenario of today, aggressive marketing and selling is the key to increase your market share. The key to improve market shares and mind shares is to be proactive and aggressively target the markets

DeMax provides comprehensive Customer Relationship Management functionality that specifically addresses the marketing needs of an automobile dealership to ensure that they stay ahead of the competition.

Campaign Management

Automobile dealers today invest and concentrate heavily in various marketing initiatives – especially in conducting various types of campaigns with numerous offers and schemes. DeMax provides the facility to create, plan, execute and analyze various types of marketing campaigns.

Effective Campaign Planning

Using the campaign creation tool, the dealer can create campaigns. The dealer can define the campaign activities, schedule them and assign them to the marketing employees. The activities could be categorized as appointments, tasks, events or actions. The type target audience can also be defined using a profile selection tool. The profile selection tool is a graphical query builder that filters the prospects / customers based on a user defined criteria. If a detailed level planning is required, the campaign can also be connected to the DeMax projects, which enables the dealer to plan, schedule and execute the detailed level activities associated with the campaign. If the campaign involves any telemarketing initiatives, then such activities can also be planned.

Complete Campaign Execution

Based on the campaigns created, the marketing employees can execute the campaigns. The various activities that have been assigned can be integrated with Microsoft Outlook where these activities would be shown as tasks for the assigned person. The assigned person can record the progress or status of the activity either in DeMax or Microsoft Outlook. DeMax would automatically synchronize the input provided by the assigned person in the campaign.

If the campaign requires any mailers / emails to be sent, then, DeMax provides the facility to generate these mailers or send these e-mails automatically by integrating it with Microsoft Word / Microsoft Outlook. The campaign costs can also be recorded such as item consumption, hours for the employees involved, costs related to telemarketing, advertising costs, costs related to mailing, and so on.

Measuring Campaign Response

The response of the campaigns can be recorded based on user defined questionnaires. These questionnaires can also be manually printed to facilitate ease of administering the response. Based on the



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response, if any further activity needs to be planned, then DeMax provides the facility to plan the follow-up activity.

Based on the response of the campaign and the costs incurred, DeMax provides the facility to perform cost benefit analysis of marketing initiatives.

Sales Force Automation

The key to staying ahead of competition for automobile dealers is to constantly stay in touch with their prospects and quickly respond to their needs. DeMax provides the functionality of Sales force automation to ensure that the sales quickly responds to the needs of the prospect. With all the business information gathered in one database the sales force will be able to manage business relationships more effectively. They will be able to analyze and evaluate activities and easily spot new opportunities because the information is structured and readily available.

Even on the road, a sales person is not cut off from vital information. By using a mobile phone, a handheld PC or a browser, they can access to various sales related information such as Price List, Vehicle Specifications, Financial Schemes offered by leasing & asset finance companies, customer related information such as proforma invoices submitted, invoices, order history and current total revenue.

Closing a deal also easier with DeMax CRM because the sales representative can do it on location, online. That way a customer can't decide to buy from someone else while the sales representative is on the way back the office to register the order.

Defining Sales Teams

DeMax provides the facility to build sales teams and associate organizational hierarchy to it to provide you clarity on reporting and responsibility structures. This also aids in associating sales targets to various sales teams.

Establishing Sales Targets

The sales target window is used to establish and monitor sales targets for each member of a sales unit. After the sales staff members have been assigned to different sales units, the visual sales unit "tree" can be browsed to inspect, define and modify the sales target for each salesperson. Sales targets are defined for each year. The yearly totals can be split into quarterly targets, which can be represented in graphical charts showing actual sales and quotations compared with sales targets for individuals or sales teams.

Generating and Following-up Prospects

DeMax provides the feature of business relations window where the details of the prospects generated can be recorded. The business relations window maintains all the detailed information regarding the prospect such as background information, financial information, vehicle requirements, asset finance requirements, documents submitted etc. Information pertaining to the method through which the prospect was generated



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can also be recorded such as campaign information, walk in query, reference by agents, financiers, sales person responsible etc. The prospects generated can be assigned to assigned to the sales person so that sales activities can be monitored until the prospect is converted into a customer.

To aid sales people to follow-up on the prospects effectively, DeMax provides a feature called Sales Workbook. The workbook in the Sales Force Automation module is typically the starting point for the sales personnel. The workbook contains day, week and month planners for each employee, "to do" lists and activity details. The salesperson can also see his own sales quotations and open orders. If need be, the salesperson can check the calendar of his colleagues. The marketing and the sales follow-up by the sales person can also be recorded using the workbook. DeMax also allows you the option to send these details to your preferred leasing companies so that they can provide you provisional confirmations for these prospects.

Performing Sales Related Activities & aiding Sales Force to work more efficiently

DeMax provides various features that would aid sales force to perform their activities easily but effectively. The sales workbook feature of DeMax provides all the sales related information to the sales force in a single widow. The sales force can record their sales follow-up, plan their sales activities, get access to the sales info such as price list, vehicle details, which will help them to streamline their operations and respond to their customers effectively.

The superiors can monitor the sales, record their to-dos and assign the to-dos to the sales force. The sales workbook automatically displays the to-dos assigned to them for them to act upon.

Apart from this, the sales force can access their workbook from multiple interfaces such as PDAs, Mobile phones, internet etc which ensures that they get information on the move.

DeMax also provides you the option of EMI Calculators which will aid the sales force to provide additional information of the various schemes operated by the asset financing companies and the EMI details for the finance requirements of the prospect.

Apart from this DeMax provides you features like Quotations Management and Documents Management to the sales force to have instant access to the proforma invoices and also manage the prospect related documents.

Establishing and Monitoring Sales Pipeline

An important capability provided by the Sales management module is the ability to establish and maintain a sales pipeline. A visual tool is provided for this.

For better and faster visibility of sales wins and sales quotations, the Sales Management module allows users to display five different types of graphs:

- Phase - the accumulated total amount of sales opportunities for each phase group.



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- Prognosis - the accumulated total amount and the weighted amount (amount multiplied by probability) of sales opportunities for each prognosis group.
- Probability - the accumulated total amount of sales opportunities in each probability group.
- Order Versus Target - the accumulated quarterly amount of invoiced sales orders and yet-to-be invoiced sales orders compared to the sales target.
- Possibility Versus Target - the accumulated quarterly amount of invoiced sales orders, not-yet invoiced sales orders and quotations compared to sales target.

Analyzing sales data

The Management statistics window in the Sales Management module enables sales managers to monitor and analyze sales data. This window provides assistance to executives and salespeople when monitoring the sales process. The Management statistics window presents sales statistics in a graphical format that shows forecasts, actual sales and sales activities. This forms the basis for pipeline and opportunity management. The Management statistics window provides a number of different ways to view sales management graphs.

Generating sales reports

The Sales Management module makes it easy to generate reports representing sales activities. DeMax provides the tools to analyze and report on sales, quotations and sales force activities. Based on these tools, opportunity management and pipeline analysis can be performed to measure sales forecasts against sales targets. DeMax also provides activity level analysis.

Vehicle Sales

Vehicle Sales Process is one of the critical processes for the automobile dealership. Its elaborate with multiple activities but at the same time has minimal turnaround times.

DeMax has end-to-end automation for order processing. DeMax has tight integration with other modules such as Inventory, Finance and Customer Relationship Management.

DeMax provides a single window system which enables the enables the vehicle sales executive to perform multiple activities and get all the relevant information through a single window.

Easy Recording of Customer Details

Customer Details can be comprehensively recorded in DeMax while the order is processed. If the customer information is available (in the form of Prospect details), then, the information can be directly used. This avoids re entry of data.

Maintaining your Pricing Structures



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DeMax provides the feature of pricing structures where the prices of the various models of the vehicles provided by the auto manufacturer can be recorded with validity details. Any additional components such as manufacturer's discounts, financier's discounts, tax components, cost of add-ons can also be maintained.

DeMax also provides the facility to define the compulsory components of the structure and the flexible components of the structure which will ensure compulsory billable components associated with various vehicle models. For example, tax components would generally be compulsory components where as add-ons would optional components of a structure. Using the pricing structures, the sales personnel would have to only select amongst the optional components of a structure while order processing and the pricing would be computed automatically. This ensures that order processing is easy, quick and error free.

Managing Provisional Confirmations of Asset Financing Companies

While Prospect Management, DeMax provides the option of sending the prospect details to asset finance / leasing companies for obtaining their provisional confirmations. DeMax also provides the feature of recording the provisional confirmations obtained and the details associated with it such as max finance amount, scheme etc. While order processing, the personnel can associate the asset finance / leasing company's provisional confirmation depending on the customer's preference on the financing option.

Forecasting Delivery Period

If the vehicles requested by the customer are in stock, then DeMax has the facility to reserve the vehicles against the customers for delivery. If the vehicle is not in stock, the DeMax has the facility to forecast the delivery of the vehicle based on the requisitions made to the manufacturer by you and the average lead-time taken by the manufacturer to deliver the vehicle.

Delivery Management

On the generation of the sales order, DeMax facilitates delivery of the vehicle by providing you the checklist of activities that needs to be performed before the delivery of the vehicle. This ensures that the vehicle delivery process is comprehensively handled and is relatively error free. DeMax also has the facility to generate other documents associated with the delivery of the vehicle in the formats required.

Generation of Invoice

DeMax provides the facility to generate invoice for the sale made. With comprehensive use of items and pricing structures, DeMax provides the facility to quickly and correctly generate invoices. DeMax can be easily configured to generate invoice in the formats required.

Managing Documentation for Asset Financing Company

If the finance company has certain prerequisite documentation to be performed such as collection of income statements, PDCs, Address Proof, identity proof, agreements etc, DeMax provides features to the maintain the checklist and record the details of documents collected. On handing over the documentation to the asset financing companies, DeMax provides the facility to record the handover of such documents.



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Managing Trade Agreements

DeMax offers the facility to manage trade agreements entered into with asset finance companies and the calculation of the interest. It also provides the facility to automatically offset the trade finance obtained from the asset financing company on the delivery or the invoicing of the asset.

Vehicle Inventory and Spares Management

To achieve cost efficiencies and effectively manage the current assets, it is very important to optimally manage the inventory levels of spares and the vehicles.

DeMax provides facilities and features that enable effective and automatic management of inventory.

Tracking Inventories

DeMax provides the facility to track the spares and vehicles - item wise or lot wise. This ensures that the individual vehicles sold can be linked to various sales orders and invoices. This feature also enables you to reserve the individual vehicles to your customers.

The usage of spares can also be tracked item wise to ensure better accountability. The item usage can be tracked based on various sales orders and service orders. DeMax enables the dealer to be in control of its stock at all the time.

Monitoring inventory levels

DeMax provides multiple reports and item card features that enables you to monitor your inventory levels automatically. Through a single window you could see the level of your inventory and the usage of your items for various sales and service orders.

DeMax also provides you the facility of defining the alert levels to give you auto alerts with respect to inventory levels of various spare items. It also provides you the facility to determine the reorder levels and the logic for reorder quantity. If the items reach the reorder levels, DeMax automatically throws up alerts. It also has the capability to automatically generate purchase orders or request orders to your automobile manufacturer or preferred vendors based on the logic defined for the reorder quantity.

Managing stores

DeMax has comprehensive functionalities to record the receipt of the vehicles and spares into your stores and warehouse. Goods Receipt Notes can be generated to acknowledge the receipt of vehicles and spares. DeMax also has the optional functionality to perform the quality check before receipt of goods to ensure that the goods are received in proper condition.



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On the receipt of goods, DeMax can organize the storage of the spares at the bin level. It can provide you with zone-bin policies, which will intimate the exact area of storage. During the usage of spare items, DeMax can provide you with information on which items needs to be picked from which storage area and be kept in which area of usage.

Through the zone-bin policies, DeMax can plan for your item requirements as on a given day and provide you with a plan on items that need to be picked from various storage areas and be kept in various usage areas. This ensures that the items required by the service workshop are available for them at the right times.

Forecasting Vehicle Requirements

DeMax inventory is closely knitted with DeMax CRM to forecast the requirements of the various models of the vehicles. Based on the orders in the pipeline and based on the response level of various segments, DeMax can provide the forecasts of various models of the vehicles.

Service and Workshop Management

One of the areas that require comprehensive planning and functionality for an automobile dealership is workshop & service. DeMax can efficiently manage the service requests and the workshop of customers.

DeMax has a dedicated module for service and workshop management that is closely integrated with the inventory module, planning module and the customer billing module.

Processing service requests

DeMax has a facility by which the customer service personnel can process the service requests of your customers. A detailed questionnaire would aid them to clearly determine and record the problems faced by the customer with their vehicles.

Determining the service time automatically

Based on the problems faced, the customer service representative can tentatively provide the customer with the date of completion of the service after determining the scope of the service request. DeMax has problem resolution templates which would aid the customer service representative to determine the scope of work.

Based on the scope of the work determined by the customer service representative, DeMax would automatically analyze the service bay availability, items availability and the resource availability and then calculate the service time required. Based on this the customer service representative can commit service delivery to your customers and also provide them with the price estimation of the service. Based on this, the service request can be entered into DeMax.



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Planning and Scheduling services

Based on the service requests obtained DeMax can plan the work orders after considering the bay availability, resource availability and the items availability. During the work order planning, DeMax also provides the utilization plan of various bays and the resources to process service requests. Based on the work order planning and the materials requirements planning, work orders can be automatically generated to the workshop.

Generating Work orders

On the completion of the planning activity, work orders are generated and released to the workshop. The work order would have clear descriptions on the problems faced by the customer, problems resolution templates, resource allocated for the completion of various service tasks, bay that would be utilized for various service tasks. If there are item requirements, then a pick list can be automatically generated so that the items would be available while performing the service task.

Unplanned items required for the completion of service task can also be requested using DeMax and DeMax would associate the item request to the service task and the service order. Pick instruction for such items would also be generated by DeMax.

DeMax has the facility to record the work in progress or the completion of various tasks within a work order.

Monitoring the progress of service requests

DeMax has comprehensive MIS and reports which facilitate in constantly monitoring progress made on the service requests – service task wise. This would aid the service and the workshop manager to prioritize the work orders based on the delivery dates.

Finding out the Workshop efficiency

DeMax has tools that measure the estimated time for providing service and the actual time for completing work orders. Using these tools, the efficiency levels of the workshop can be measured.

Using resources effectively

DeMax provides facility to create resources and profile them based on the proficiency of the resources. The resource pool can also be associated to various problem resolution templates. With this feature, DeMax will enable in allotting the right jobs to the right person.



Warranties Management

If the service task comes under the warranty term, then DeMax provides the facility to bill the work done under warranty and bill to the OEM. DeMax can also automatically create debit notes to the OEM and a dispatch document can be created for the items to be dispatched to the OEM.

DeMax provides the facility to bifurcate service tasks based on the warranty terms provided by the OEM.

Managing trade-in vehicles

Trade In Vehicle features enables in running exchange offers and manages the vehicles received as exchange

One of the common campaigns run to attract customers in automobile dealership industry is to run exchange campaigns. While it provides an attractive scheme to the customers, it is a very complex process for an automobile dealership. To aid in running exchange campaigns,

Estimating the total cost of trade in vehicles

Sales involving trade in vehicles can also be precisely tracked using DeMax. Necessary repairs and expenses can be carried out and recorded using DeMax so that the final financial outcome of the entire transaction once the trade in vehicle is sold can be determined.

Quantitative Evaluation of Trade-In Vehicles

DeMax provides the feature to determine the evaluation points of the trade-in vehicles based on user defined questionnaire. Based on this, DeMax provides the facility to define the base price, which can be used to derive the offer price of trade-in vehicles.

Depending on the evaluation matrix and the points earned, DeMax can suggest a price range for the purchase of the trade in vehicles. This ensures a standardized and transparent evaluation mechanism to ensure seller confidence.

Purchase Order Generation

Offer letters in the company-defined templates can also be generated using DeMax. On the acceptance against the offer letter, purchase order for the pre-owned vehicles can be generated.



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Financial Accounting and Financial Management

The financials module is integrated with all the other modules and helps you to automate many of your financial practices and procedures according to your needs.

DeMax addresses the complete functionality of accounts payable, accounts receivables, general ledger, bank management and fixed assets.

Tight integration with all other functions

The modules of DeMax are a part of one system; a transaction in one module is automatically updated in the corresponding accounts of the general ledger. For example, an invoiced purchase order automatically updates the ledger accounts of purchase, tax and accounts for summary of accounts payable.

Flexibility

DeMax provides the facility to define the level of control that is required by setting up business rules. Individual transactions and information about specific events can be seen quickly and easily.

Drill Down and Audit Trail

Connections of other business functions with general ledger in DeMax have an additional advantage – options to trace each transaction to its origin. DeMax provides facilities to drill down on the fly to investigate a specific amount, or finding out the exact information required using highly specific filtering criteria.

Powerful financial analysis using Dimensions

The dimensions feature of DeMax provides a pseudo – data warehousing tool data can be viewed and analyzed in a more sophisticated way. Various business transactions can be associated to user-defined dimensions. Based on these dimensions, or combination of dimensions, the dealer could view information and analyze them. By this feature, DeMax enables the top management to analyze financial information with multiple perspectives, which would be very useful for decision-making.



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Human Resources Management

An agile human resource management system can quickly evolve the organization to meet the challenges of a fluctuating business environment.

DeMax helps in gathering and structuring employee information and support their development, maintain an overview of your organization and create the right internal environment to drive the business forward.

Defining Organization Structure

DeMax provides the facility to create organizational charts of the entire organization, a matrix organization or even a project organization. DeMax can Store résumés, primary contacts, and contract and payroll information of employees. Employees can maintain their own information and monitor development goals via personalized portals.

Managing Payroll Information

In addition to the employee profiles, DeMax can maintain payroll information for every single employee. Bank account numbers, tax numbers, pension schemes and accrued vacation can all be stored for each employee. DeMax can also keep track of variables such as bonuses, stock options, health insurance, and other employee specific supplements.

Handling Recruitment process

DeMax automates recruitment processes and employee absence analysis. Using DeMax, the dealer can learn from the experience of previous recruitment campaigns and select the right media and methods for sharper communication. And once the applications start coming in, DeMax has an efficient system to keep track of their status.

Training and Development

Assuring attractive and satisfying career planning for the employees is a challenge that demands organized documentation of the agreements made between employer and employee. With DeMax, the dealer can identify skill gaps to determine required employee development, initiate and follow up on development plans and provide a uniform framework for people managers to reach employee development goals. Strategic planning, best practice action templates, SWOT analysis and action planning will help the dealer to leverage experience and human resources, making it easier for the to stay on track and achieve its goals.



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CEO Desktop

This feature gives all the crucial information at your fingertips. CEO desktop is a graphical, easy to navigate screen wherein all the key summary information related to sales, purchase, vehicles inventory, parts inventory, sales pipeline, bank status etc is provided. Data drill downs for analysis of any figure is also provided. From here, the CEO can navigate into his appointment book, check out the related websites or browse through any reports to know the exact status of his dealership in real-time.

Web Interface

User Portal

User Portal of DeMax delivers all the critical information employees need on their own homepage, helping them become more productive. All that's required to access the specific data they need is a Microsoft browser. With User Portal it's easy for the employees to access data in DeMax, no matter where they're working. Remote users, such as traveling sales representatives, can immediately access their customized home page with the information they require from DeMax to complete their task.

Commerce Portal

Commerce Portal of DeMax answers all of the interactive business needs. It streamlines interactions through Web-based trading, self-service and other forms of collaboration. The supply chain partners interact with the dealer through a personalized Web portal that matches the needs of their particular roles. Every partner has their own personalized base through which they can do business with you.

With Commerce Portal, the dealer connects to its customers and vendors to its business management system by way of the Internet. The dealer can respond to its partners' needs with Web access to real-time information and self-service features. Information is always up-to-date and accurate, and self-service features are relevant to the user's particular business needs.

Owing to real time integration and the use of business logic, DeMax Commerce Portal offers a straightforward way to do business with your supply chain partners.

Salient Features of DeMax

All in one

With DeMax, the entire front office and back office are integrated so that they function as a single, powerful tool. Extend and strengthen your customer reach with a seamless flow of information connecting all of your



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vital business processes including contact management, servicing, supply chain and ancillary business functions such as Finance and HRMS.

Ease of Use

The intuitive environment ensures that only little training is required. Features, such as menu bars and screen layout, are based on Microsoft Windows and are the same as the version you are running – whether that be Windows XP, Windows 2000 or another.

Strong tools for Business Analysis

Decision makers in a global marketplace face tough questions everyday. Is the business healthy? Who are my best customers? Which supplier should I choose? DeMax gives you access to the accurate and timely analysis you need to compete successfully. Capturing the larger overview and drilling down to the details in the familiar and user-friendly DeMax environment help you learn from previous decisions, investigate opportunity and target markets and customers with pinpoint accuracy – quickly.



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About Sundaram Infotech

Sundaram Infotech Solutions Limited (referred as Sundaram Infotech) is a wholly owned subsidiary of Sundaram Finance Ltd., one of the most respected names in the financial services industry in India.

Sundaram Infotech is a 400+ employee strong Chennai (India) based global IT solutions provider specialized in providing focused but multiple IT solutions since Oct 2000. Sundaram Infotech primarily focuses on providing Integrated Enterprise Applications, Data Warehousing solutions and Web collaboration services for niche industry verticals such as BFSI, Automotive and Construction.



Sundaram Infotech is quality-driven company in all respects. In addition to being backed by ISO 9001:2000 & ISO 27001: 2000, Sundaram Infotech is well on the hunt for SEI CMM Level 4. As a partner in growth of its stakeholders, Sundaram Infotech assures topnotch products and services, consistently delivered on the agreed schedule and within the pre-determined cost framework. The ability to deliver quality solutions on time has earned the trust and appreciation of huge corporates in India, Middle East Asia, Australia, Europe and USA.

Dynamics AX Center of Excellence

Sundaram Infotech is a Gold Certified Partner with its competency in Microsoft Dynamics AX. Sundaram Infotech has established its **Dynamics AX Center of Excellence (AX COE)** since early 2003. Today the AX COE of Sundaram Infotech has over 100+ domain & technical experts and able project managers specializing in Microsoft Dynamics AX. Around 80% of the experts are certified professionals of Microsoft Dynamics AX in their respective competencies. Apart from having AX experience, the experts also have industry experience in their respective domains.

The AX COE @ Sundaram Infotech has experience in Microsoft Dynamics AX relating to business process consulting, solution architecting, infrastructure setup, installation, implementation services, training, and support & maintenance. These services have been provided to multiple clients' worldwide, which include clients from USA, India, Middle East and Europe. Most of Dynamics AX projects relating to these services were successfully provided to large enterprises. Based on this experience, the AX COE has formulated structured delivery models to handle completely onsite / completely offsite / hybrid implementations.

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