



Key Benefits of NAV and the Cloud for Connex

- KPI visibility
- Rapid deployment of solution
- Multi-currency transactions
- Capturing department distinctions
- Web accessibility from anywhere
- Eliminate manual tracking in spreadsheets
- Excel-based reporting
- Share data across continents



Connex International, located in Burnsville, Minnesota, is a wholly owned subsidiary of Milestone Systems based out of Denmark. Milestone Systems is an international company that sells video surveillance management software in many countries around the world. Their software is distributed and sold through an authorized partner channel. Connex International provides the curriculum, content creation, and training for Milestone’s partner channel.

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Kevin Renner
Controller at Connex

Milestone has been a long time user of Microsoft Dynamics NAV (formerly Navision) and needed Connex to adopt the system as well. Milestone’s internal support department didn’t have the time or infrastructure to handle the NAV installation for Connex. Connex wanted to find a local vendor who could augment Milestone’s internal support department and help them implement a hosted, or “cloud” version of NAV quickly. Connex found Business Automation Specialists of Minnesota (BASM) on-line and engaged them for the migration to NAV.

A hosted solution was critical for Connex. They had not budgeted for new hardware and software. Thanks to NAV’s support of the Cloud platform, Connex was able to move ahead while using their current technology.

Kevin Renner, Controller at Connex, stated that, “We were excited to move to Microsoft Dynamics NAV because of the capabilities it had that we didn’t have with our current system. We saw that it would greatly enhance our reporting capabilities and eliminate our heavy use of spreadsheets. BASM configured the cloud version of NAV to support our parent company’s data structure but also made it work for our complicated accounting processes. They were also able to bring all of our old data into the new system so we had instant accesses to our prior data.”

Case Study

The right mix of technology and practical business experience.

In addition to their accounting system, Connex uses a standalone CRM system to manage class participation, profitability and budgeting; as well as an attendee management system. BASM recommended Jet Reports, an integrated Excel reporting tool, to integrate the data from the three separate systems. This tool, once fully utilized, will save significant time and reduce errors by eliminating data-rekeying.

Prior to NAV, Connex was double-entering data to manage profitability of classes, and monthly reports had to be done manually. Now Microsoft NAV does the monthly reports automatically, as needed. Connex is able to use Jet Reports, an integrated feature within Microsoft Dynamics NAV, to create a CRM reconciliation report which provides them revenue and cogs by class and in under 5 minutes.

With 18 - 20 trainers traveling the world using a combination of pre-paid expenses, reimbursable expenses, and expenses drawn from a corporate bank account with a debit card, the accounting department tracked a complex reimbursement system with spreadsheets. Expenses needed to be matched to receipts and tagged to the appropriate class. Accounting had to keep a spreadsheet of receipts, itineraries, and more; items that were received but hadn't cleared the bank yet. Once a transaction cleared the bank, they then had to rekey it into the accounting system.

Our users love the system. It provides them expanded customer information, better reporting, and we've all found that having the system web-accessible is a huge bonus. As we continue to use more and more of NAV's capabilities we expect to see even more quantifiable results. Our month-end reporting process is now a matter of pressing a few buttons. We are also excited to add extra capabilities by implementing the cash flow and check writing modules; which we currently do by hand.

Kevin Renner
Controller at Connex

All this is done in NAV now, using native Purchase Journal and Dimension functionality. Accounting can now key the transaction directly into NAV, eliminating the spreadsheet, and when it clears the bank, accounting simply finds it in the Purchase Journal and posts it. If the bank transaction isn't in the purchase journal, accounting will know that they didn't receive a receipt and will be able to follow-up appropriately. The ability to auto reverse entries was also a key benefit to the accounting department.

The two primary system users, Kalina - Accounts Payable, and Frances - Accounts Receivable, agreed.



Kalina in Accounts Payable at Connex, and Frances in Accounts Receivable, both stated that they have more visibility to the data, and much better reporting. Considering how complicated their accounting structure is, they are very happy with the system in place. They both concurred that, "Working with the team at BASM is great. They are very helpful and the customer support is excellent."

Having better visibility and the ability to see specific information in familiar formats, was one of the primary goals of Connex's President; along with rapid deployment of the solution. With employees on the road doing training all around the world, the ability to manage multi-currency transactions was paramount. Also, effectively capturing department distinctions were needed for Milestone's corporate reporting.

Keeping their parent company informed and happy is another key to Connex's satisfaction. Milestone can access Connex's data in real-time with the cloud version of Microsoft Dynamics NAV. Microsoft Dynamics NAV and BASM's efficient and effective services met all of Milestone's goals.

Kevin concluded by stating, "We really enjoy working with BASM! They are timely, professional, and it's easy to get ahold of someone when needed. We were able to build a relationship by getting to know each of the team members involved. We have found the local support we will use long-term."

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Kevin Renner, Controller at Connex

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