



# MAKING TRACKS

**XAPT**

A quarterly newsletter  
from XAPT on  
Digital Transformation

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IN THIS  
EDITION



Pipeline Machinery / Partnerships in 2023 / NAXT365 and Cat Card Integration  
Journey to Success: Foley / NAXT365 Success Story with SOE 360 / Customer Support Update

## Pipeline Machinery joins digital transformation



WHAT'S  
HAPPENING

**XAPT Corporation, a leader in innovative business solutions, has officially partnered with Pipeline Machinery International (PLM), a distinguished Cat® equipment dealer in the global mainline pipeline construction industry.**



From left to right: Sam Hampton, President, XAPT Americas; Brad Tucker, Chairman of the Board, PLM, Mustang CAT; Gene Salyer, VP Sales & Business Development, XAPT; Tony Fernandez, President, PLM; Ted Hill, Corporate Finance Officer, PLM.

With a significant global presence, PLM is committed to embracing the potential of cloud technology through the implementation of NAXT365 Microsoft Dynamics 365 for Equipment Dealers.

Tony Fernandez, President of Pipeline Machinery International, expressed his excitement about this partnership, stating, "As a dealer who specializes in equipment that is 'purpose-built' for the pipeline construction industry, we are very excited to be transitioning to the NAXT365 solution that is 'purpose-built' for Caterpillar dealers."

Pipeline Machinery International's commitment to customer success and the global delivery of industry-leading products guides them into the realm of digital transformation. By migrating to the cloud-based NAXT365 solution, PLM aims to modernize its systems, embracing cutting-edge technologies

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**TONY FERNANDEZ** · President of Pipeline Machinery International



Continued on page 2 >



PARTNERSHIPS  
NEWS

## Partnerships in 2023

**The year has seen XAPT forging even closer relationships with our existing partners Caterpillar and Microsoft and the exciting addition of Accenture to the team.**



We have continued to work with Caterpillar to understand their direction for their Cat Digital initiatives, delivering thirteen new and updated interfaces to our NAXT365 customers and a smaller but significant number to our NAXT2012 dealers.

Continued on page 2 >

## Pipeline Machinery joins digital transformation [Continued from page 1]



From left to right: Ted Hill, Chief Financial Officer, PLM;  
Sam Hampton, President XAPT Americas;  
Brad Tucker, Chairman of the Board, PLM;  
Tony Fernandez, President, PLM

such as Artificial Intelligence and aligning seamlessly with Caterpillar dealers' unique needs.

"I am thrilled to announce our partnership with Pipeline Machinery, and I could not be more excited about the future. Together, we are charting a course for digital transformation by assisting Pipeline in the process of migrating their dealership business system to a modern, cloud-based solution. Microsoft continues to invest significantly in its ERP business, with

a focus on strengthening its core capabilities and introducing new technologies to the platform, such as AI. Our goal is to provide Pipeline with a solution that offers efficiency, scalability, and innovation to both its customers and employees. We are honored that after thorough due diligence, Pipeline has chosen us as their partner, and we are committed to delivering exceptional value to their operations,” says Sam Hampton, XAPT President.

## Partnerships in 2023

[Continued from page 1]

Our continued engagement with Caterpillar sees plans for XAPT to deliver another twelve initiatives in 2024, with more expected to be added before 2024 is finished.

and their Fast Start team. We are engaging at a technical level to improve the performance of the solution and to optimise the designs of our products.

Perhaps the most exciting event of the year was the announcement of a three-party alliance, Microsoft, Accenture and XAPT, to work with dealers to provide input to the roadmap of the NAXT solution. A steering committee has been founded, workstreams in four areas: Advanced Warehousing; Sales and Field Service; Data; and Integration, have been established and regular meetings and workshops have been taking place and the outcome is promising.

An excellent example of this is the work currently being undertaken with Ziegler Cat to define the requirements for Helios 2. Where Ziegler has agreed to be the pilot and along with Ziegler, Microsoft, Accenture, Avanade, XAPT and Caterpillar are engaged, working together to scope the requirements and design and implement the solution.

In July, XAPT and Accenture signed a teaming Agreement, setting out how the two parties, along with Avanade, would work together to provide services to existing and future XAPT and Accenture customers. Partially as a result of this,

but also as a result of very positive feedback from NADITA, and other conferences, along with successful go-lives, XAPT has seen a significant increase in interest by dealers to upgrade their existing 2012 and 2009 version, or to implement NAXT365.



XAPT, Accenture and Avanade, actively working together, are in discussions with many of these dealers to make this a reality.

2023 has been an exciting and positive year and 2024 is only expected to be better. Thank you to all of you in our customers, at Caterpillar, Microsoft, Accenture, and Avanade who have worked together to help us achieve not just what has happened in 2023 but to lay a firm foundation for next year and the years to come.

Significant activity has taken place around the PCC Performance Improvement Initiative, with improvements being seen by all those Customers involved. Further activities are planned following the release by Caterpillar of a new version of Antares.

Our engagement with Microsoft has continued to strengthen and deepen. We have a cadence of regular meetings with Senior Microsoft Research fellows

# Revolutionizing Financial Management: NAXT365 and Cat Card Integration



**Exciting news for US Caterpillar Dealers!**  
XAPT and Caterpillar have united forces to seamlessly integrate the Cat® Card account into our NAXT365 solution, offering your dealership financial expertise and technological innovation.

With NAXT365 Cat Card integration, users can streamline Cat Card payments and application of Cat Credit discounts for parts, services, and rentals. The solution automates manual processes and offers several benefits.



## FLEXIBLE PAYMENT OPTIONS

- Cat Card payment availability is based on the customer credit policy setup.
- Enable this option for all customers or only selected ones.

## EFFICIENT CAT CARD MANAGEMENT

- Seamlessly integrate Cat Card master data for customers into NAXT365.
- Easily look up, save, and set default Cat Card accounts for customers based on location codes.

## AUTOMATED TRANSACTIONS

- Cat Card payment transactions with a captured status are automatically entered and posted.
- Configure your payment entry flexibly, including options for bank transactions or ledger entries.

## REFUNDS AND REPORTING

- › Process refunds directly to a Cat Card during sales invoice crediting.
- › Enjoy comprehensive reporting with Cat Card and Cat Credits transactions included in customer receipt reports.

## SECURE PROCESSING

- Automatic validations ensure secure processing of sales documents.
- Verify payment coverage and authorization for Cat Card transactions.

## PAYMENT FLEXIBILITY

- Enhance payment flexibility by splitting tender and entering various payments alongside Cat Card payments.
- Users can easily monitor payment coverage and transaction status through an intuitive overview form.

## PAYMENT CONTROL AND TYPES

- Control allowed types of other payments through related setup.
- Options range from dealer credit allowance to restricting customers to prompt payment methods.

## TRANSACTION DETAILS AND RECONCILIATION

- Access Cat Card and Cat Credit transactions with details in various forms for reconciliation and reporting.
- Historical Cat Card transactions are available with filtering options for reconciliation with the Cat daily functioning report.



**Take your dealership's finance to the next level with NAXT365 and Cat Card Integration. Streamline your operations effortlessly and stay ahead in the ever-evolving world of dealership management.**



## Journey to Success with NAXT365 > part 1



**NAXT365 was created for dealers looking for a future-forward, technology-driven, dealership-centered solution to simplify business operations and connect large organizations across multiple locations, departments and responsibilities. Organizations like Foley, Inc., a New Jersey-based Caterpillar dealer with a 50+ year history, began business when the automobile was still emerging.**

we had counted over 70 apps we had developed in-house just to make our day run,” explains Danielle Papenberg, the NAXT365 project manager and Director of Organizational Development for Foley. The end goal for NAXT365 implementation was “one localized system that employees could use across the organization (...) to make us more efficient and more productive from an internal standpoint,” she says.

Papenberg says. There are many similarities among XAPT customers; however, the implementation of this technology platform is tailored to each organizational user. “We’re all working with Caterpillar. We’re all dealerships. We’re selling the same thing. But the inner workings of each organization are important. Even though we have so many similarities, our processes and culture can be completely different, and that’s an essential item to consider in



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**DANIELLE PAPERBERG**  
Director of Organizational Development  
for Foley

Over the past 60 years, Foley has grown to nearly 800 employees in five locations in the northeastern United States. As the organization grew, so did the systems to help keep them integrated. We had created a homegrown approach, patched together over the years, because of work that Dealer Business System (DBS) could not support. At one point,

Foley's leadership was strategic in setting up the implementation team, including representatives from the front line of the business and every function, with support from directors and C-suite executives, to find "a Microsoft provider that was future-forward technology focused, and most importantly, was one that was within the dealership community,"

the process,” Papenberg says. The XAPT partnership guided the integration of the NAXT365 system, adapting and enhancing the Foley process and creating a sense of connectivity throughout the organization. With a team of XAPT experts, Foley is beginning to harness the power of NAXT365 to optimize processes, reduce costs, and improve efficiency, announcing a return to normal business operations post-implementation three months earlier than predicted.

## NAXT365 Success Story with SOE 360



**NAXT365 is at the forefront of driving digital transformation across the Caribbean. Supported by XAPT, SOE 360 successfully led the implementation of NAXT 365 Microsoft Dynamics for Equipment Dealerships at Machinery & Energy (M&E ABC) located in Aruba, Bonaire and Curaçao.**

The dedicated team at XAPT provided valuable support throughout the implementation, complementing the efforts of SOE 360. M&E ABC now stands alongside our esteemed customers, including Gecolsa, Relianz, and SOE 360, in embracing cloud technology through the adoption of NAXT365.

Ahio Guzman, SOE 360 Business Transformation Manager, shared his excitement, stating, "Our Business Transformation Team successfully completed this rollout project, which has been months in the making. Today, we want to celebrate together this milestone of implementing Dynamics 365 NAXT at another one of our dealers. Now, we embark on the stabilization phase of the platform, during which the Business Transformation team and everyone involved will dedicate their energy and enthusiasm to guarantee its correct operation for all the companies. We move forward on the transformation path!"

The successful completion of this phase highlights the teamwork of qualified and high-performing teams from SOE 360, XAPT, M&E ABC, and other allies who joined forces to achieve this monumental goal.

“The ABC project team is a good example of teamwork and collaboration and delivering outcomes when it matters to the business,” expressed Harry Sathe, Technical Project Manager at XAPT.

At XAPT, we take pride in being a driving force behind digital transformations like the one shared by SOE 360 and M&E ABC. By providing

unwavering support and expertise, we empower our partners to embrace the full potential of NAXT365. This solution not only streamlines operations but also paves the way for enhanced efficiency, scalability, and innovation. We remain committed to supporting our valued partners in their pursuit of digital excellence and look forward to more projects like this in the future.


**“Today, we want to celebrate together this milestone of implementing Dynamics 365 NAXT at another one of our dealers.(...) We move forward on the transformation path!”**

**AHIRO GUZMAN** · SOE 360 Business Transformation Manager



From left to right: David Ollarves, Counter Warehouse, M&E ABC; Jenny Aponte, Administrative Analyst, M&E ABC; Marc Homman, Commercial Manager, M&E ABC; Lorena Martinez, Commercial & Marketing Transformation Chief, SOE 360; Nicolas Tobon, Project Manager, SOE 360; Susana Meneses Service Transformation Specialist, SOE 360; Henry Alexis Ramirez, Former General Manager, M&E ABC; Jorge Vargas, Supply Chain Transformation Chief, SOE 360; Asif Sahid, General Manager, M&E ABC; Adrielo Martina, Counter Sales, M&E ABC.





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