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| Overview  Market Opportunity  For small businesses and self-employed professionals, effective day-to-day accounting and bookkeeping are essential. When cash flow is king, invoice tracking and prompt payment are critical. Traditional relationships between small businesses and their accountants, however, are rarely a model of business efficiency: meetings are time-consuming, and keeping clear and synchronized invoice records is a problematic manual processes.  Solution  Diamante integrated their existing accounting product for small businesses with Microsoft Online Services Business Productivity Online Suite in order to streamline the process by which small businesses issue invoices and share them with their accountants. The new integrated solution uses SharePoint Online to eliminate most manual tasks and enhance security and archiving, and Microsoft Live Meeting and Microsoft Communicator Online to create a dynamic and efficient live communication channel.  Benefits   * Better business relationships * Dynamic communications * Common view of invoices and invoice status * Automatic document transfer workflow * Secure archival * Remote and mobile access * Improved productivity |  |  | “We saw the potential Microsoft Online Services gave us to transform an already successful accounting solution into a dynamic and responsive collaboration environment. Immediate and proactive online interaction between small businesses and their accountants and bookkeepers raises the range and quality of service for both parties.”  Enzo Dalla Pria, CEO – Diamante Spa  For small businesses and for the self-employed, the whole process of accounting and bookkeeping can be a challenge. How much do you do yourself, and how much do you depend on an accountant? Even when government simplifies the fiscal and legal landscape, accounting can remain a complex and time-consuming activity—all too often taking up time and resources that could be better spent building business.  Italian application developer Diamante had already commercialized a successful accounting product for small business. With the advent of Microsoft Online Services Business Productivity Online Suite, Diamante decided to integrate their product with the Business Productivity Online Suite in order to not only enhance the experience for small business, but to re-engineer the day-to-day relationships between small businesses and their accountants.  The resulting solution comprises three core elements:   1. **Fatturiamo.it** – Literally “**Let’s Bill.”** This is the client-side environment, used by the small business to prepare, issue, and track invoices. 2. **Network24** – An application for the accountant or bookkeeper that provides an up-to-the-moment record of the client’s invoices. 3. The **Diamante Service Centre** – A Software as a Service (SaaS) environment that offers secure Internet-based document transfer and dynamic communication between small businesses and their accountants.   By combining these three elements with the Business Productivity Online Suite, the solution streamlines the preparation and issuing of invoices that uses an automated workflow to ensure proper invoice processing. The solution is compatible with the accountant’s own systems, eliminating the need for additional transfer or data entry. The real advantage, however, lies in dynamic communications. By adopting Microsoft Office Communicator Online and Microsoft Office Live Meeting, the solution makes it easy for accountants to resolve impromptu enquiries and to schedule effective online discussion. In this dynamic environment, accountants can provide their clients with the highest quality consultancy, while maximizing everyone’s use of time. |

Solution

Diamante extended their existing small business-accountant solution by integrating it with the Business Productivity Online Suite. This enhanced solution enables small businesses to achieve effective online interaction with their accountants, providing a common view of all invoices, their payment status, and their tax implications.

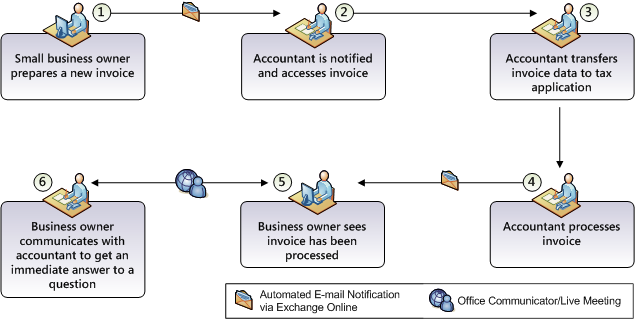
Specifically, the solution offers four key functions:

* Streamlines the invoicing process for businesses, and automatically provides invoice details to their accountant
* Facilitates accountant-business client communications via Office Communications Online
* Provides up-to-the-moment reporting details that business can access at the office or through mobile devices
* Enhances accountant-client relationships by leveraging Suite features to host seminars and other Web-based meetings

Solution Components

Fatturiamo.it

Fatturiamo.it allows small businesses to manage invoices, estimates, payments due, cash in, supplier details, and inventory. It has achieved success with small businesses primarily because of its ease-of-use, and its integration with Microsoft® Word.



Network24

Network24 is used by the accountant to receive tax and billing data from the client, together with invoices. Once the data is received and verified, it can be transferred to the accountant’s tax systems for tax liability calculations and the eventual compilation of tax returns.

Diamante Services Center

The Diamante Services Center is a hosted Software as a Service (SaaS) environment that:

* Manages all the subscriptions for Fatturiamo.it and Network24 SLAs and billing
* Manages user- and role- based security
* Ensures information integrity
* Offers a private mail message-based communications system
* Enables the exchange of management information
* Acts as a software update subsystem for the client applications

The Automated Invoicing Workflow

Diamante’s solution makes extensive use of Business Productivity Online Suite services. As an example, the Automated Invoicing workflow is depicted in the following illustration. Steps in this workflow are described in the following text.

Small Business Owner Prepares a New Invoice

The business owner uses Fatturiamo.it to quickly prepare a new invoice, recalling frequently used customer details, terms and conditions, and automatically logging payment due dates.

Upon saving the invoice, Fatturiamo.it automatically routes the invoice to the accountant and uses SharePoint Online Web services to post a copy to the business’s SharePoint Online site.

Accountant Is Notified and Accesses Invoice

When a new invoice is submitted, the workflow uses Exchange Online to automatically send a notification to the accountant. The accountant uses Network24 to access the new invoice.

Accountant Transfers Invoice Data to Tax Application

The accountant reviews the invoice and transfers the data to the appropriate tax application.

Accountant Processes Invoice

The accountant processes the invoice in Network24. When finished, Network24 automatically updates the task in the SharePoint workflow as completed.

Business Owner Sees Invoice Has Been Processed

After the accountant processes the invoice, Exchange Online automatically notifies the business owner of the completed task. The business owner sees the status of the invoice change in Fatturiamo.it after the accountant processes it. If the business owner has any questions, he can use Office Communicator and Live Meeting to quickly communicate with his accountant.

Solution Development and Implementation

Diamante’s existing applications—Fatturiamo.it and Network24—were written using the Win32® API. In their initial releases, they did not offer real-time communication, nor did they make any use of SharePoint.

Diamante decided to integrate their applications with the Business Productivity Online Suite. This was a relatively simple operation, requiring only the insertion of Web service calls into the original source code and a minimum of modification to the applications themselves. The solution uses built-in Suite Web services and workflow; no custom coding was required in SharePoint Online or Exchange Online.

This project used SCRUM methodology that included a 30-day “sprint to goal” after estimating backlog effort.

Step 1: Define Technical Requirements

The development cycle began with a requirements document that defined the new features and how the integration with the Suite would be achieved. Two key development objectives were identified:

* Create a SharePoint workflow to assign tasks to an accountant in order to confirm proper tax allocation.
* Use Live Meeting to make the accountant available to help his customers in any taxation- or accounting-related matters and answer any tax queries.

The development team compiled a list of tasks it needed to complete to meet the sprint goal, and divided the project development into two areas that mapped to the development objectives.

Step 2: Create a WSS-based DLL

A dynamic-link library (DLL) was created using the .NET Framework 3.5 to act as a wrapper around Windows® SharePoint Services 3.0. The DLL uses an event-based asynchronous pattern when making calls to SharePoint Online.

This library was developed to offer three key functions:

* Provide information about SharePoint Online document lists using the Windows SharePoint Services (WSS) List Web service.
* Expose methods used to upload and download documents via the WSS Copy Web service.
* Manage workflow tasks via the WSS Workflow Web service.

Service access and security are handled by the Microsoft Online Services Sign In tool.

Step 3: Create an Office Live Meeting Services-based DLL

Similar to the previous DLL, this library was created using the .NET Framework 3.5 in order to act as a wrapper around the Microsoft Office Live Meeting Service API. It also uses an event-based asynchronous pattern for making Microsoft Office Live Meeting Service API calls.

This library was developed to offer three types of services:

1. A service to obtain, in a session, the URL to the Live Meeting service API processor. LINQ to XML was used as helper for manipulating POST and response XML Meeting Service API messages.
2. Services for scheduling meetings, including the lmWebService.GetTicket request to verify that the caller is Windows-authenticated.
3. A service to manage meetings.

As with the previous DLL, Microsoft Online Services access and security are provided by the Sign In tool.

Step 4: Configure SharePoint Online

In this step, SharePoint libraries and lists were created. Libraries were used for hosting invoices (in Microsoft Office Word format), and to define workflow task rules. Lists were used for sending e-mails and assigning tasks to the accountant.

In addition, two security groups were added to the SharePoint Online site in order to enable accountants and small business users to access the site. Graphic design layout was done and XML configurations were made using SharePoint Designer.

Step 5: Integrate Existing Client Applications with the Suite

Diamante modified Fatturiamo.it and Network24 to include new Business Productivity Online Suite features provided by the DLL wrappers. A new dialog form was included to specify the SharePoint site URL and the conference center name. The applications’ User Interfaces were also updated to provide access to the new features.

Step 6: Deploy the Solution

In order to publish the applications’ new Suite integration features to existing customers, a new Windows Installer .msi was created and published to Diamante Online Updates system. The existing Smart Client applications use a Web service to identify when updates are available, so customers can easily upgrade to the enhanced solution.

Benefits

* Streamlines the invoicing process for both small businesses and their accountants
* Helps build better business relationships by offering a real-time video communication channel
* Provides automatic document transfer workflow and secure archival of invoice data
* Improves productivity by allowing remote access to invoice reports via mobile devices

Introducing the Business Productivity Online Suite

Microsoft Online Services provide software delivered as a hosted service directly from Microsoft data centers, managed by Microsoft staff, and with a guaranteed 99.9 percent Service Level Agreement. These standardized solutions are designed so that partners can rapidly deploy services to their customers at a low, up-front investment with predictable, recurring costs.

The all-new Business Productivity Online Suite provides streamlined communications, simplified management, and business-class reliability and security.



The customer can order this service for as few as five seats at a time.

The Business Productivity Online Suite includes the following services, which can be purchased on a monthly subscription basis either separately or as part of a suite:

**Microsoft Exchange Online**, based on Microsoft Exchange Server 2007, offers businesses e-mail, calendaring, other messaging-based capabilities, and archiving. It also enables coexistence, which means new online users can interact with users on local servers.

(Introducing the Business Productivity Online Suite, Continued)

For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234 in the United States or (905) 568-9641 in Canada. Outside the United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to [www.microsoft.com](http://www.microsoft.com)

For more information about Microsoft Online Services, visit the Web site at

[www.microsoft.com/online](http://www.microsoft.com/online)

Diamante is a specialist solution provider for small entrepreneurial business. Its key focus is on business management, helping its clients use their time more effectively by streamlining and automating day-to-day operational tasks. Diamante has an active customer base of over 4,000 businesses across Italy, and is keen to expand across Europe and beyond. Diamante is a Microsoft Gold Certified Partner and is an innovator with a strong focus on the benefits of Microsoft Online Services.

For more information about Diamante products and services, visit the Web site at [www.diamante.it](http://www.diamante.it)

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| Microsoft Business Productivity Online Suite | |
| * Microsoft Exchange Online * Microsoft SharePoint Online * Microsoft Office Communications Online * Microsoft Office Live Meeting * Microsoft Exchange Hosted Filtering |  | |

**Microsoft SharePoint Online**, based on Microsoft Office SharePoint Server 2007, provides a single integrated location where employees can efficiently collaborate with team members, find organizational resources, search, and manage content and workflow.

**Microsoft Office Communications Online** enables people to communicate easily with their colleagues across locations and time zones via instant messaging (text), voice, and video.

**Microsoft Office Live Meeting** is a hosted Web conferencing service that connects people in online meetings, training, and events through a reliable, enterprise-class hosted service.

**Microsoft Exchange Hosted Filtering** protects businesses’ inbound and outbound e-mail from spam, viruses, phishing scams, and e-mail policy violations.

**About the Microsoft Business Productivity Online Suite**

The Microsoft Business Productivity Online Suite provides businesses with virtually anywhere access to rich communication, collaboration, and productivity applications via subscription-based, Microsoft-hosted, online services. This hosted solution helps organizations offset the burden of managing and maintaining business systems, freeing information technology (IT) resources to focus on initiatives that can deliver competitive advantage to the business. The solution is part of the Microsoft’s Software-plus-Services delivery model to provide customers more choices than traditional, hosted, or on-premises solutions, allowing them to make deployment decisions that best fit the needs of their organization.

For more information about the partner opportunities provided by the Business Productivity Online Suite, see <http://partner.microsoft.com/online>.

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