

Cloud ERP Promise: Microsoft Dynamics Case Study



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Digital Transformation Journey

- Digital transformation is an effort by management to leverage the latest information technology capabilities.
 - This is done by improving and integrating business processes within the organization and with outside parties such as suppliers and customers.
- This journey is an evolutionary process, and its pace is dictated by management and driven by several factors such as capabilities, resources, competitive forces and client demands.
- Every organization embarks on this journey, but to what extent and at what pace?



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Digital Transformation Defined

- Digital transformation is the ability for an organization to leverage the latest information technologies in order to achieve capabilities such as:
 - Establishing highly integrated operational processes
 - Enabling collaboration within the organization
 - Enabling customer interaction with our systems
 - Integrating within the supply chain network
 - Improving management decision making capabilities
 - Viewing data as an organizational asset
 - Developing capabilities to maximize data asset values
 - Establishing proper safeguards for data assets



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Transformation Accelerators

- Recent Events – Realization that we need the ability to work from anywhere at anytime with ease and security.
- Industry Realities – Competitive pressures and customer expectations for product and service pricing and delivery capabilities.
- Technological Capabilities – Outdated IT systems, applications, tools and related resources.
- Managerial Priorities – Executive leadership’s view on priorities and allocation of needed resources for growth and profitability.



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Transformation Rewards

- Operational Agility – Ability to adjust to changing conditions in a rapid response manner.
- Lowered Transaction Costs – Tightly integrated systems offer increased process efficiencies.
- Improved Decision Making – Data becomes more of a digital asset; easier to slice and dice/dashboards.
- Increased Customer Loyalty – Customers across generations find ways suitable for them to conduct commerce.
- Increased Scalability – Company can easily add or remove users and new products/services/markets.
- Improved Cyber Resiliency – Reducing risks through leveraging cloud provider security expertise.



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Middle Market Leaders



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Case Study





Microsoft Business Application Solution Ecosystem

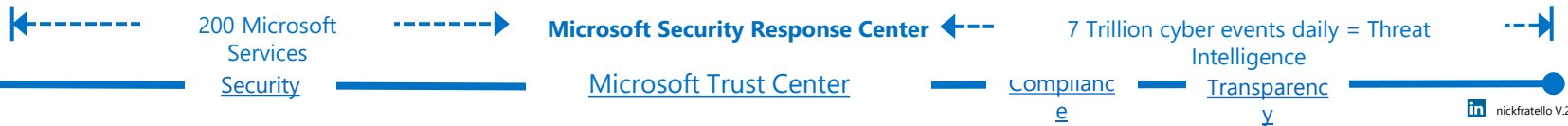
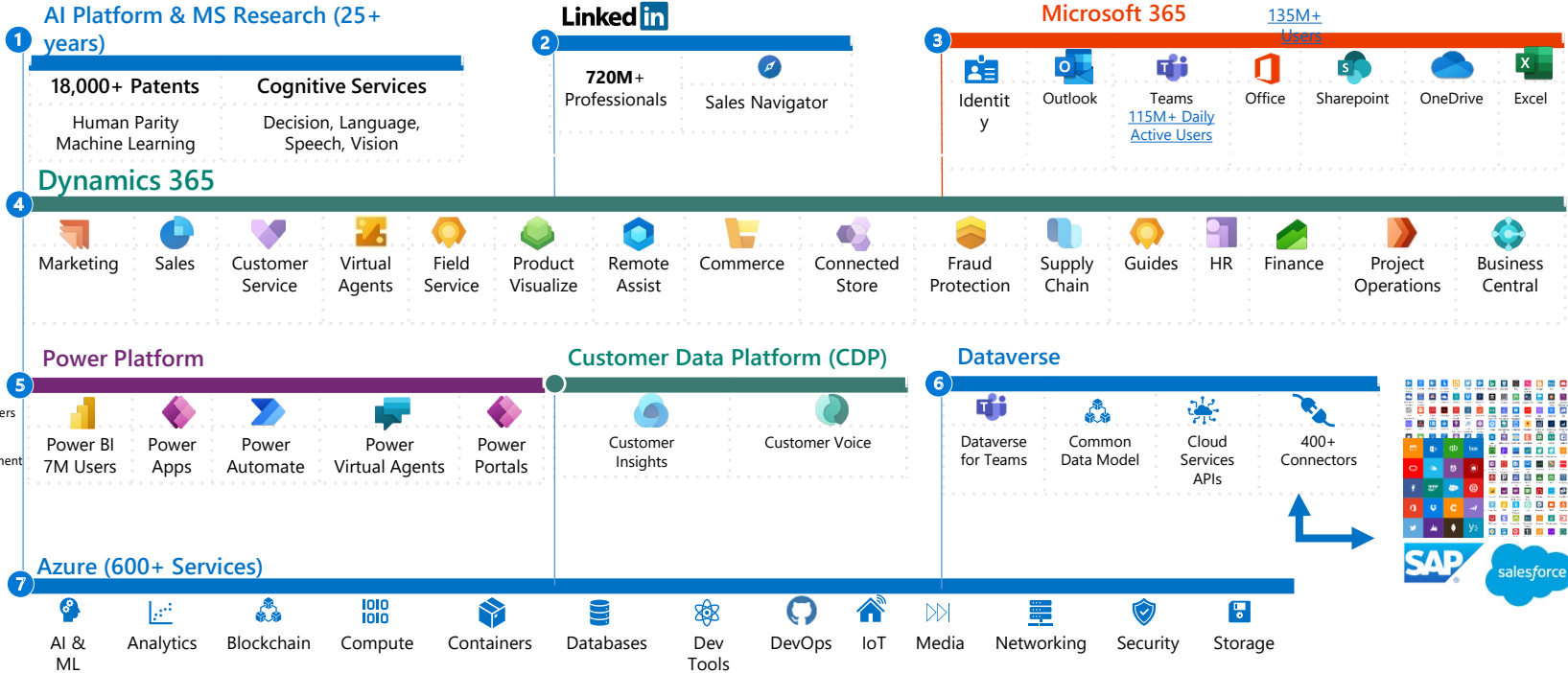
Microsoft's Business Applications are built on Azure, using a **Common Data Model** that unifies data in **Dataverse**. **Power Platform** is the low code extensibility solution for Microsoft's **Office 365**, **Teams**, **Dynamics 365** business applications (CRM & ERP) and integrates with **400+ services**.



64K+ Partners

Analyst Recognition:

- 1) Analytics & BI
- 2) API Management (Full Lifecycle)
- 3) Cloud DBMS
- 4) Cloud Infrastructure
- 5) Content Services Platforms
- 6) CRM Customer Engagement
- 7) CRM Customer Service Solutions
- 8) CRM Lead Management
- 9) CRM Sales Force Automation
- 10) Data Integration Tools
- 11) Data Science & ML
- 12) ERP (Cloud)
- 13) Iot (Industrial)
- 14) Low-Code App Platforms
- 15) Meeting Solutions
- 16) Robotic Process Automation (RPA)
- 17) Security: Access Management
- 18) Security: Cloud Access Security Brokers
- 19) Security: Endpoint Protection
- 20) Security: Ent. Information Archiving
- 21) Security: Unified Endpoint Management



Dynamics Business Central



Dynamics 365 - Connect people, processes, and systems

Reimagine productivity with Dynamics 365 and Office 365

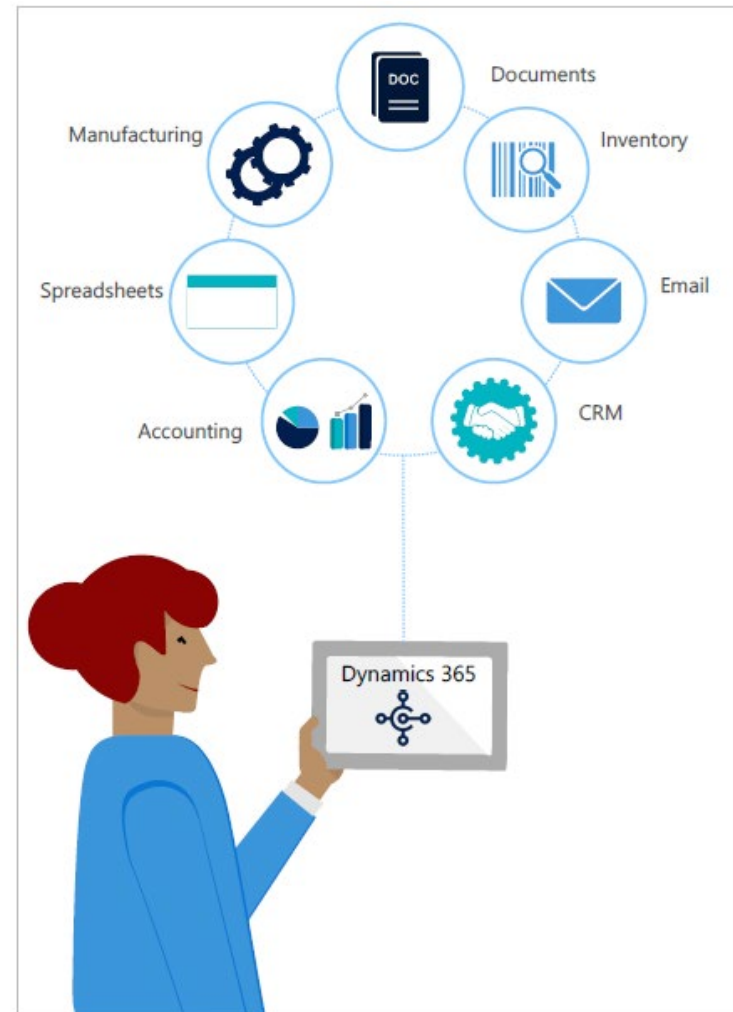
Microsoft brings the worlds of business processes and personal productivity together, connecting your people, processes, and systems like never before.

Right now, your employees might be the only common link between your business systems and the email, spreadsheet, and word processing tools you use every day. This means they waste a lot of time flipping between apps or cutting and pasting, which can lead to data entry errors. Connected business solutions from Microsoft help pull everything together so your people don't have to.

Together, Microsoft Dynamics 365 Business Central and Office 365 help you:

- Drive productivity by reducing time spent switching between stand-alone apps
- Foster collaboration and communication by breaking down internal silos and broadening visibility across the organization
- Accelerate user adoption and lower training time with a seamless user experience

Let's take a look at some scenarios where Dynamics 365 and Office 365 work together to make your people more productive and your business more efficient.

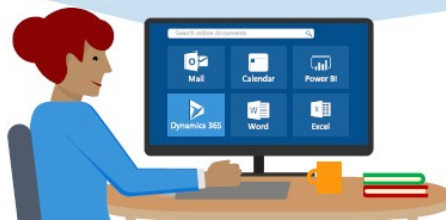
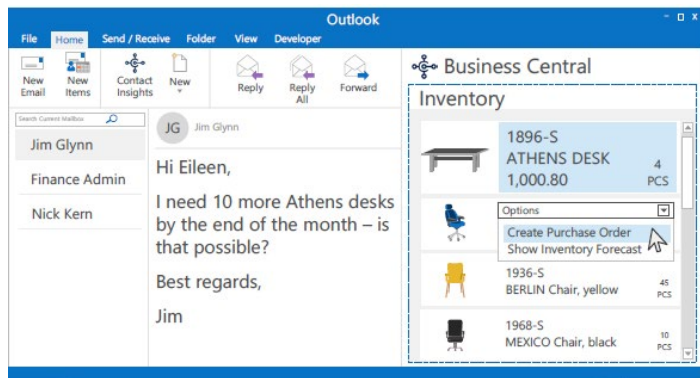


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Work where business takes you

As a business owner, imagine you receive an email from a high-priority customer who urgently needs an order delivered in a short timeframe. With Dynamics 365 Business Central, you can find the information you need and act on it without searching disparate systems or coordinating with other departments. Without leaving your inbox, you check inventory and discover that you don't have enough stock on hand to fulfill the order. In the same interface, you create and send both a purchase order to the vendor and a quote to your customer, moving on to your next task within minutes.



Access inventory information and create purchase orders, quotes and invoices right from Microsoft Outlook

Dynamics 365 workflows also help you secure processes and work on the go. Suppose you are out of the office and an email alerts you that a sales quote has exceeded your established 10% maximum discount. Right from your mobile inbox, you quickly review the quote and check the customer's order history, account status, and credit limit. You make an informed decision to approve the discount, which automatically updates the quote and notifies the sales rep that it's ready to be sent to the customer.



Edit and approve quotes, orders and invoices on any device

With Dynamics 365 and Office 365 working together, you can take quick action right from your email – allowing you to spend more time managing your business and connecting with customers.

Improve customer interactions

You know how critical it is to keep your sales team connected in the office and on the go. Dynamics 365 and Office 365 simplifies and automates daily tasks to keep your sales team focused on managing sales.

Your sales rep receives an email from a customer requesting a quote on some items. The system recognizes the sender, enabling him to easily pull up customer card within Outlook. From this dashboard, he reviews the account – including the customer's existing quotes, ongoing orders, and sales history. As he's creating the quote, customer and product information auto-populate, helping him get it done faster.

While he was sending the sales quote, a note hit his inbox from a potential customer he met at a recent event. The system recognizes that their email address is not in the customer database, and prompts him to add them. Without leaving Outlook, he creates their profile in the Dynamics 365 app.

This kind of automation reduces time spent on administrative tasks, allowing your sales team to quickly respond to inquiries and ultimately improve customer interactions.



Use Microsoft Word to modify quote and invoice templates in Dynamics



Sales Quote
S-QUO1004

Coho Winery
Jim Glynn
192 Market Square
Atlanta, GA 31772
USA

Ship to Address
Coho Winery
2 Lewis Road
Atlanta, GA 31772
USA

CONUS USA, INC.
7122 South Ashford St
Westminster
Atlanta, GA 31772

Document Date: November 7, 2016
Payment Terms: 1 Month/2% 8 days
Shipment Method: Express

Item	Description	Quantity	Unit	Unit price	Line Amount
1908-S	LONDON Swivel Chair, blue	7	Piece	190.10	1,330.70
1920-S	ANTWERP Conference Table	2	Piece	647.60	1,295.60
Subtotal					2,626.30
Invoice Discount					0.00
Total Tax					0.00
Total USD					2,626.30

Amount Subjected to Sales Tax: 0.00
Amount Exempt from Sales Tax: 2,626.30

Set up or update customers and vendors in Dynamics 365 from Outlook

A screenshot of the Outlook Business Central interface. The top ribbon shows 'File', 'Home', 'Send / Receive', 'Folder', 'View', and 'Developer'. Below the ribbon are buttons for 'New Email', 'New Items', 'Contact Insights', 'New', 'Reply', 'Reply All', and 'Forward'. The main area displays an email from 'SM Sally McArthur'. The email content reads: 'Hi Benjamin, Nice meeting you last week. Could you send me more information about your office chairs? Best regards, Sally McArthur'. On the right side, there is a 'Business Central' panel with a prompt: 'Do you want to add a new contact?' with 'Edit' and 'Refresh' buttons. Below this, it says 'The sender of this email is not among your contacts.' and offers two options: 'Add Sally McArthur as a contact' and 'View existing contacts'.

Built in Workbench

Dynamics 365 Business Central

CRONUS USA, Inc. | Finance | Cash Management | Sales | Purchasing | Setup & Extensions | Intelligent Cloud Insights

General Journals | G/L Account Categories | Fixed Assets | Sales Budgets | Sales Analysis Reports | Inventory Analysis Reports | Employees | Postec
Chart of Accounts | G/L Budgets | Account Schedules | Purchase Budgets | Purchase Analysis Reports | Currencies | Dimensions | Depos

Metric	Value	Action
Sales This Month	\$3,963	> See more
Overdue Sales Invoice Amount	\$89,792	> See more
Overdue Purch. Invoice Amount	\$828	> See more
Sales Invoices Predicted Overdue	0	> See more

Ongoing Sales

Category	Count	Action
Sales Quotes	2	>
Sales Orders	8	>
Sales Invoices	10	>

Ongoing Purchases

Category	Count	Action
Purchase Orders	0	>
Ongoing Purch. Invoices	0	>
Purch. Invoices... Next Week	0	>

Payments

Metric	Value	Action
Unprocessed Payments	1	>
Average Collec... Days	0.0	>
Outstanding V... Invoices	1	>

Incoming Documents

Category	Count	Action
My Incoming Documents	1	>

Product Videos

- Product Videos
- Replay Getting Started

Microsoft Power Platform



Robotic Process Automation (RPA)

- Many organizations have developed a patchwork of applications, with data being entered in multiple places and requests travelling via various tools ranging from manual reports and forms to emails and spreadsheets from one system to another in different ways.
- Robotic Process Automation (RPA) democratizes automation through integration of all applications using a unified set of tools to eliminate non-value added activities while at the same time increasing overall process efficiency, quality and scalability levels.
- RPA is a digital transformation realization tool enabling managers to achieve “hyper automation” by having the ability to quickly identify business process improvement opportunities and use available tools to achieve high ROIs in a rapid and quantifiable fashion.



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Robotic Process Automation Examples

- Accounting & Finance – Payables and receivables processes. Automated reconciliation and financial close activities.
- Operations – Customer and vendor management, inventory automation, cycle counts, order fulfillment, quality tracking, job/project setups, project budget monitoring.
- Sales & Marketing – Campaign and outreach email management, brochure and content sharing processes, CRM automation.
- H/R – Employee forms, onboarding and termination processes, benefits management support processes.
- Executive Management – Business analysis, monitoring and reporting. Risk management and regulatory compliance support.



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Microsoft Power Automate

The screenshot displays the Microsoft Power Automate interface. The main workspace shows a flow diagram for 'Employee Onboarding Workflow Diagram.vsd'. The diagram is organized into a swimlane with 'Process Owner: Human Resources Department' and three lanes: 'Employee', 'HR', and 'Business'. The flow starts with an 'Item added' trigger in the HR lane, followed by a 'Get item details' action. A decision diamond labeled 'Check department' follows, with a 'None' path leading to a 'Send an email to HR' action in the HR lane. The flow then continues to an 'Excel' connector and a 'Get one' action in the Business lane. A central dialog box with a green checkmark and the text 'Your flow was created' is overlaid on the diagram. The dialog also states 'Your flow was successfully created! To make changes to it, go to Microsoft Flow.' and has a 'Done' button. On the right side, the 'Triggers and Actions' pane is visible, showing a search bar and a list of triggers and actions. The 'Trigger(169)' section includes: 'Office 365 Outlook - When a new email arrives', 'Office 365 Outlook - When a new email arrives (webhook)', 'Office 365 Outlook - When an email is flagged', 'SharePoint - When a file is created (properties only)', and 'SharePoint - When a file is created in a folder'. The 'Shape Data - Task...' pane is also visible, showing properties like 'LoopType', 'TaskType', 'IsForCompensation', 'BoundaryType', 'Function', 'Connector', and 'Trigger'.

Microsoft Power Automate

Microsoft | Power Automate | Templates | Connectors | Learn | Search templates ... | Sign in | Try free | Buy now

Search templates ... | Sorted by popularity

[All flows](#) | [Featured](#) | [Remote work](#) | [Approval](#) | [Button](#) | [Data collection](#) | [Visio](#) | [Email](#) | [Events and calendar](#) | [Mobile](#) | [Notifications](#) | [Productivity](#) | ...

Template Title	Author	Run Count	Flow Type
Save Office 365 email attachments to OneDrive for Business	By Microsoft	642425	Automated
Send myself a reminder in 10 minutes	By Microsoft	381550	Instant
Get a push notification when you receive an email from your boss	By Microsoft	358940	Automated
Power Apps button	By Microsoft	295729	Instant
Get today's weather forecast for my current location	By Microsoft	289632	Instant
Start approval when a new item is added	By Microsoft	279086	Automated
Send a customized email when a new SharePoint list item is added	By Microsoft	277639	Automated
Send a customized email when a new file is added	By Microsoft	272641	Automated

Ready to Go Onlin....pdf | Ready to Go Onlin....pdf | BeyondtheBasics-....pdf | dynamics365-en-r....pdf | Ready to Go Onlin....pdf | FastTrack for Dyn....pptx | Show all

Microsoft Analytics



Analytics/Management Dashboards

- Dashboards are enablement tools of business performance management in today's modern organizations.
- Dashboards have become popular due to recent advances in cloud and open interface technologies.
- Dashboards are used to report on KPIs in an effective manner in order to enable management to keep everyone focused on achieving tangible results.
- Dashboards, when implemented properly, improve communication and accountability throughout the organization.



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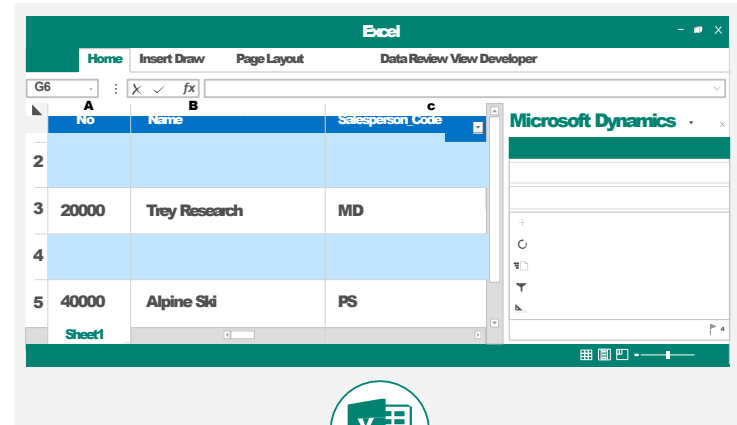
Simplify reporting and make better decisions

Your accountants run a crucial piece of the business. Dynamics 365 make an accountant's day easier by simplifying reporting, streamlining month-end close, and reducing data entry errors.

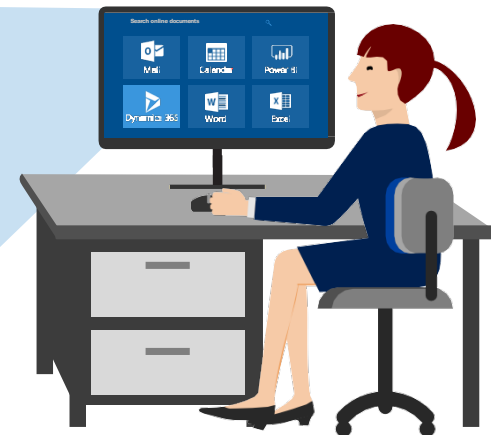
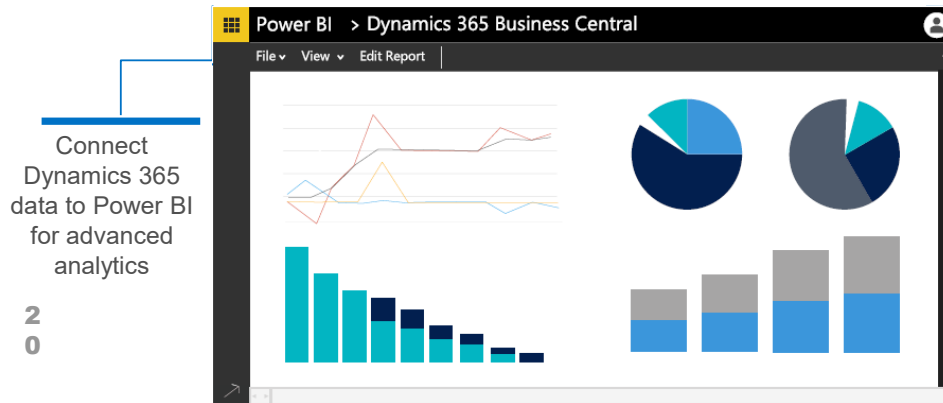
Her day starts in the Dynamics 365 app, where she is preparing the monthly P&L statement. She needs to edit multiple invoices at once, so she opens the invoice list in Microsoft Excel. In a matter of minutes, she adds a new batch of invoices and updates the status of several others. With just one click, she publishes the data back to the Dynamics 365 app, where it's automatically refreshed.

Wanting a deeper analysis of the month's revenue, she switches to Microsoft Power BI. There she has multiple ways to analyze Dynamics 365 data, including the revenue information she just updated. Through rich visuals and custom dashboards, she gains insights she couldn't get from standard reports.

With Dynamics 365 Business Central, you get an end-to-end view of your business and built-in intelligence that helps you make more informed decisions.



Refresh data in Excel without having to return to the financial system



Microsoft Power BI



Assessing Your Needs

- Are you using older or outdated business applications?
- Are most of your key systems still on premise?
- Are your key applications difficult to integrate with one another?
- Are you heavily dependent on Excel to address deficiencies?
- Are your systems cyber security and information privacy ready?
- Do you have strong business continuity capabilities?
- Are you taking advantage of the latest industry offerings?
- Are your systems making your employees more productive?
- Are your systems helping you gain competitive advantage?



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Concluding Comments

- Path to digital transformation varies from one organization to another.
 - One size does not fit all!
 - Simpler is better
- Digital Transformation Ready?
 - Arrange a consult/discussion session on plans and needs to determine a best fit approach.
- Microsoft Cloud Opportunities?
 - Arrange a Complimentary Microsoft Test Drive to identify opportunities.



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Thank You for Attending!



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