

Microsoft Cloud: Driving Innovation & Profits



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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 employees need the ability to securely work and collaborate anywhere/anytime with ease.
- Industry Realities – Competitive pressures and customer expectations for product and service delivery capabilities.
- Technological Advances – Recent improvements and price reductions in cloud computing, process automation and analytics.
- Managerial Priorities – Executive leadership's view on priorities and allocation of needed resources to upgrade systems to attract/retain talent to better support growth and profitability plans.



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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.
- Recruiting and Retainage – Ability to attract better talent and retain talent due to better capabilities.
- Improved Cyber Resiliency – Reducing risks through leveraging cloud provider security expertise.



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Middle Market Leaders





Microsoft Business Application Solution Ecosystem

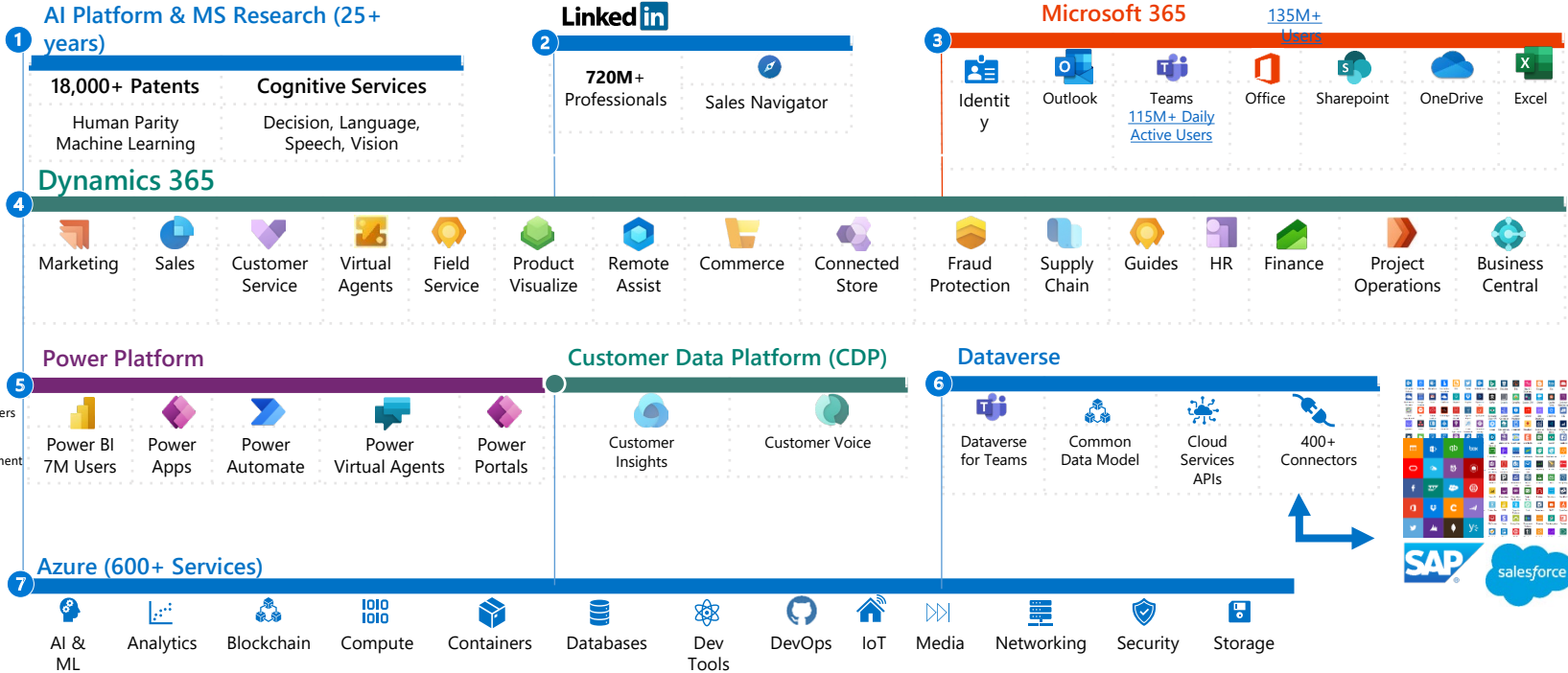
Microsoft's Business Applications are built on Azure, using a **Common Data Model** that unifies data in **Dataverse**. **Power Platform** is the low code extensibility solution for Microsoft's **Office 365**, **Teams**, **Dynamics 365** business applications (CRM & ERP) and integrates with **400+ services**.



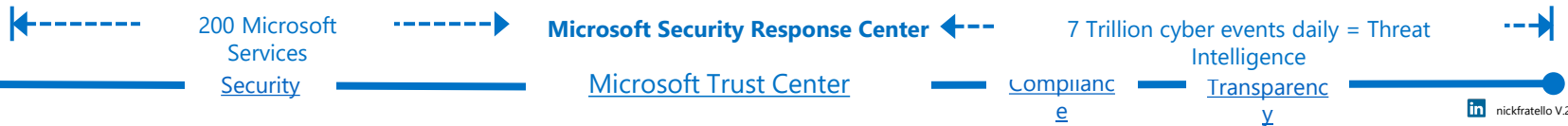
64K+ Partners

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



Industry Solutions



nickfratello V.2020.02

Business Central



Modern Worker Productivity

- The Modern Worker is more resourceful and more aware of the possibilities than any worker ever has been before.
- They thrive on the agility to work however they want, from wherever they need to, using whatever device they prefer or have on hand.
- They absolutely expect to be able to do everything they could do in person at the office from anywhere...

Going All In with The Cloud



Going All In with The Cloud

- Microsoft has been involved in the middle market financial and ERP space for many years since purchase of Great Plains, Solomon, Navision and Axapta.
- More recently and in close alignment with the drive to Office 365, now Microsoft 365, and the Azure cloud platform, Microsoft improved upon all on-premises products to create comprehensive ERP platforms that are delivered as software-as-a-service (SaaS).
- Microsoft Dynamics 365 Business Central (BC) is ideal for the small to medium sized business.
- Moving the Microsoft Dynamics 365 family to the cloud removed the burden of operating computer services from the customers themselves and put it in the best possible hands, those of Microsoft's own experts.



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Dynamics 365 - Connect people, processes, and systems

Reimagine productivity with Dynamics 365 and Office 365

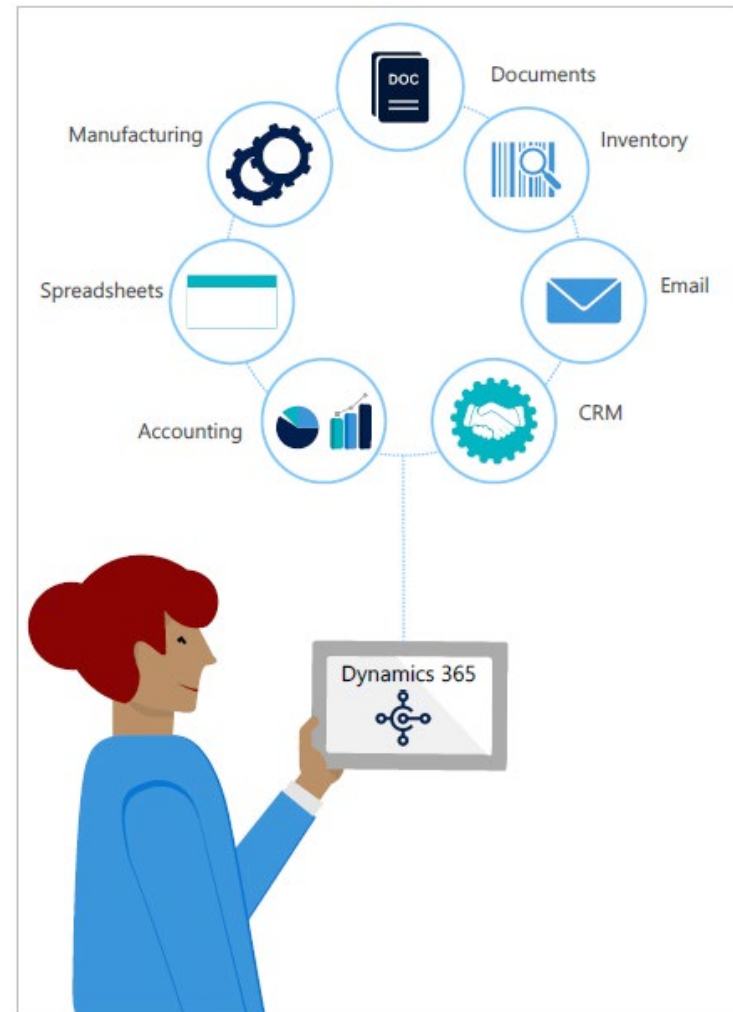
Microsoft brings the worlds of business processes and personal productivity together, connecting your people, processes, and systems like never before.

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:

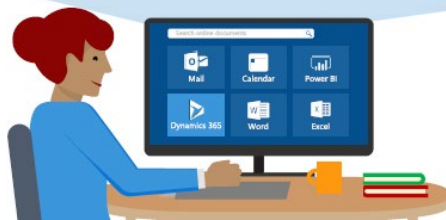
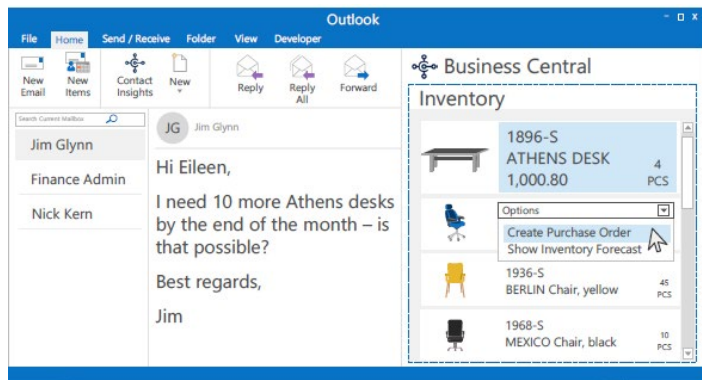
- Drive productivity by reducing time spent switching between stand-alone apps
- Foster collaboration and communication by breaking down internal silos and broadening visibility across the organization
- Accelerate user adoption and lower training time with a seamless user experience

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.



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.

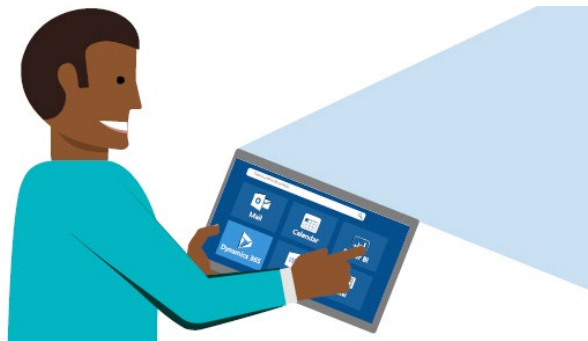
Improve customer interactions

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 Leves 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

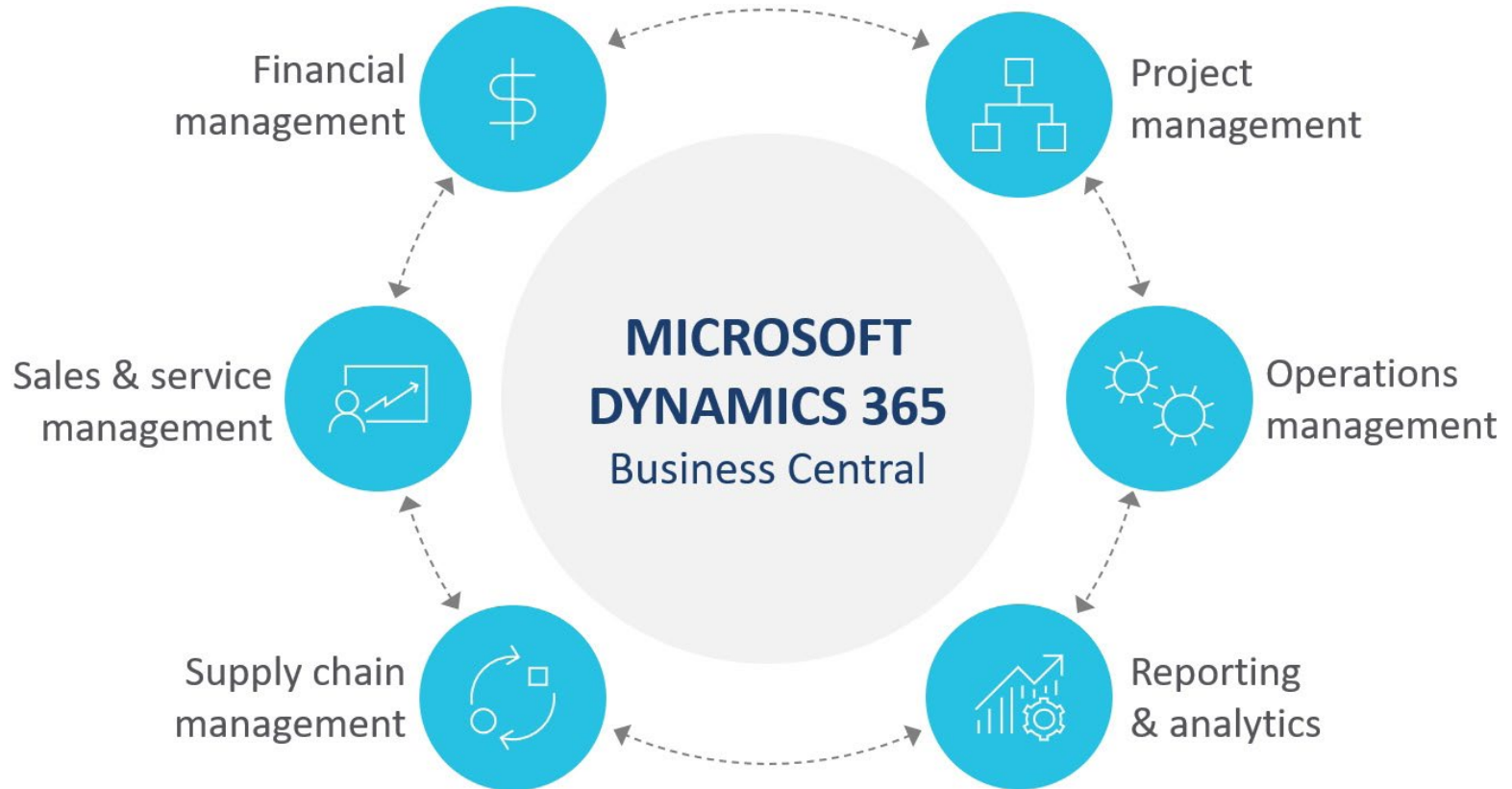
Item	Description	Quantity	Unit	Unit price	Line Amount
1908-S	LONDON Swivel Chair, blue	7	Piece	190.10	1,330.70
1920-S	ANTWERP Conference Table	2	Piece	647.60	1,295.60
Subtotal					2,626.30
Invoice Discount					0.00
Total Tax					0.00
Total USD					2,626.30

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 desktop application. The top ribbon shows 'File', 'Home', 'Send / Receive', 'Folder', 'View', and 'Developer'. The main pane displays an email from 'Sally McArthur' with the text: 'Hi Benjamin, Nice meeting you last week. Could you send me more information about your office chairs? Best regards, Sally McArthur'. On the right, the 'Business Central' pane is active, showing a prompt: 'Do you want to add a new contact?' with 'Edit' and 'Refresh' buttons. Below the prompt, 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'.

Dynamics BC Components



Built in Workbench

The screenshot displays the Dynamics 365 Business Central interface for CRONUS USA, Inc. The top navigation bar includes sections for Finance, Cash Management, Sales, Purchasing, Setup & Extensions, and Intelligent Cloud Insights. A secondary menu lists various reports and tools like General Journals, G/L Account Categories, Fixed Assets, Sales Budgets, Sales Analysis Reports, Inventory Analysis Reports, Employees, and Postec Depos.

The main dashboard features four key performance indicators (KPIs) for sales and invoices:

- Sales This Month:** \$3,963
- Overdue Sales Invoice Amount:** \$89,792
- Overdue Purch. Invoice Amount:** \$828
- Sales Invoices Predicted Overdue:** 0

Below these KPIs are three sections: Ongoing Sales, Ongoing Purchases, and Payments. Each section contains several data points in teal-colored cards:

- Ongoing Sales:** Sales Quotes (2), Sales Orders (8), Sales Invoices (10)
- Ongoing Purchases:** Purchase Orders (0), Ongoing Purch. Invoices (0), Purch. Invoices... Next Week (0)
- Payments:** Unprocessed Payments (1), Average Collec... Days (0.0), Outstanding V... Invoices (1)

At the bottom, there are three more sections: Incoming Documents (My Incoming Documents: 1), Product Videos (Product Videos), and Get started (Replay Getting Started).

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Keeping You Updated!

Dynamics 365 | Business Central

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

Customers | Vendors | Items | Bank Accounts | Chart of Accounts

INSIGHT FROM LAST MONTH

The best-selling item was **ATHENS Desk** with **18 units** sold

ACTIONS

- + Sales Quote
- + Sales Order
- + Sales Invoice
- + Purchase Order
- + Purchase Invoice
- > New
- > Payments
- > Reports
- > Setup
- Excel Reports

Activities

SALES THIS MONTH: **\$1,906** > See more

OVERDUE SALES INVOICE AMOUNT: **\$64,906** > See more

OVERDUE PURCH. INVOICE AMOUNT: **\$49,422** > See more

SALES INVOICES PREDICT... OVERDUE: **0** > See more

ONGOING SALES

SALES QUOTES: 2	SALES ORDERS: 4	SALES INVOICES: 7
-----------------	-----------------	-------------------

ONGOING PURCHASES

PURCHASE ORDERS: 4	ONGOING PUR... INVOICES: 3	PURCH. INVOI... NEXT WEEK: 0
--------------------	----------------------------	------------------------------

PAYMENTS

UNPROCESSED PAYMENTS: 1	AVERAGE COL... DAYS: 5.8
-------------------------	--------------------------

INCOMING DOCU...

OUTSTANDING... INVOICES: 10	MY INCOMING DOCUMENTS: 1
-----------------------------	--------------------------

Efficient User Interface



Dynamics 365 | Business Central | Items

CRONUS USA, Inc. | Sales | Administration Sales/Purchase | Analysis | Self-Service | Intelligent Cloud Insights

Items: All | Search | + New | X Delete | Process | Item | Request Approval | Inventory | Attributes | Edit In Excel | Actions | Navigate | Report | ...

1896-S ATHENS Desk 1,000.80	4 PCS	1900-S PARIS Guest Chair, black 192.80	0 PCS	1906-S ATHENS Mobile Pedestal 433.60	5 PCS
1908-S LONDON Swivel Chair, blue 190.10	3 PCS	1920-S ANTWERP Conference Table 647.80	10 PCS	1925-W Conference Bundle 1-6 188.80	0 PCS
1928-S AMSTERDAM Lamp 54.90	8 PCS	1929-W Conference Bundle 1-8 233.80	0 PCS	1936-S BERLIN Guest Chair, yellow 192.80	100 PCS
1953-W Guest Section 1 125.80	-49 PCS	1960-S ROME Guest Chair, green 192.80	2 PCS	1964-S TOKYO Guest Chair, blue 192.80	4 PCS
1965-W Conference Bundle 2-8 233.80	-81 PCS	1968-S MEXICO Swivel Chair, black 190.10	10 PCS	1969-W Conference Package 1 341.80	-7 PCS
1972-S MUNICH Swivel Chair, yellow 190.10	0 PCS	1980-S MOSCOW Swivel Chair, red 190.10	0 PCS	1988-S SEOUL Guest Chair, red 192.80	0 PCS
1996-S ATLANTA Whiteboard, base 1,397.30	10 PCS	2000-S SYDNEY Swivel Chair, green 190.10	38 PCS		

Forecast

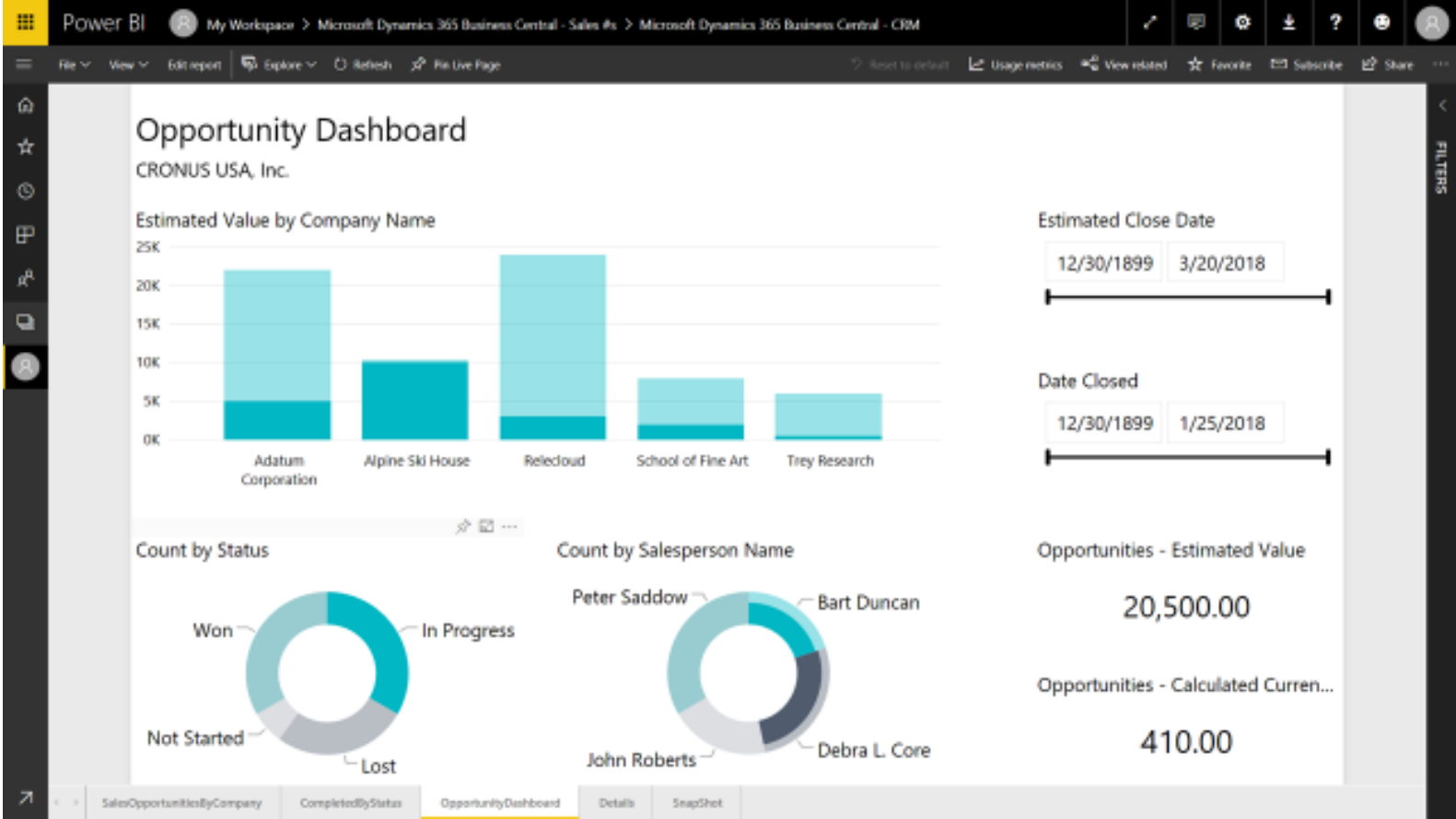
Updated 04/09/18 Update Successful

Power BI Reports

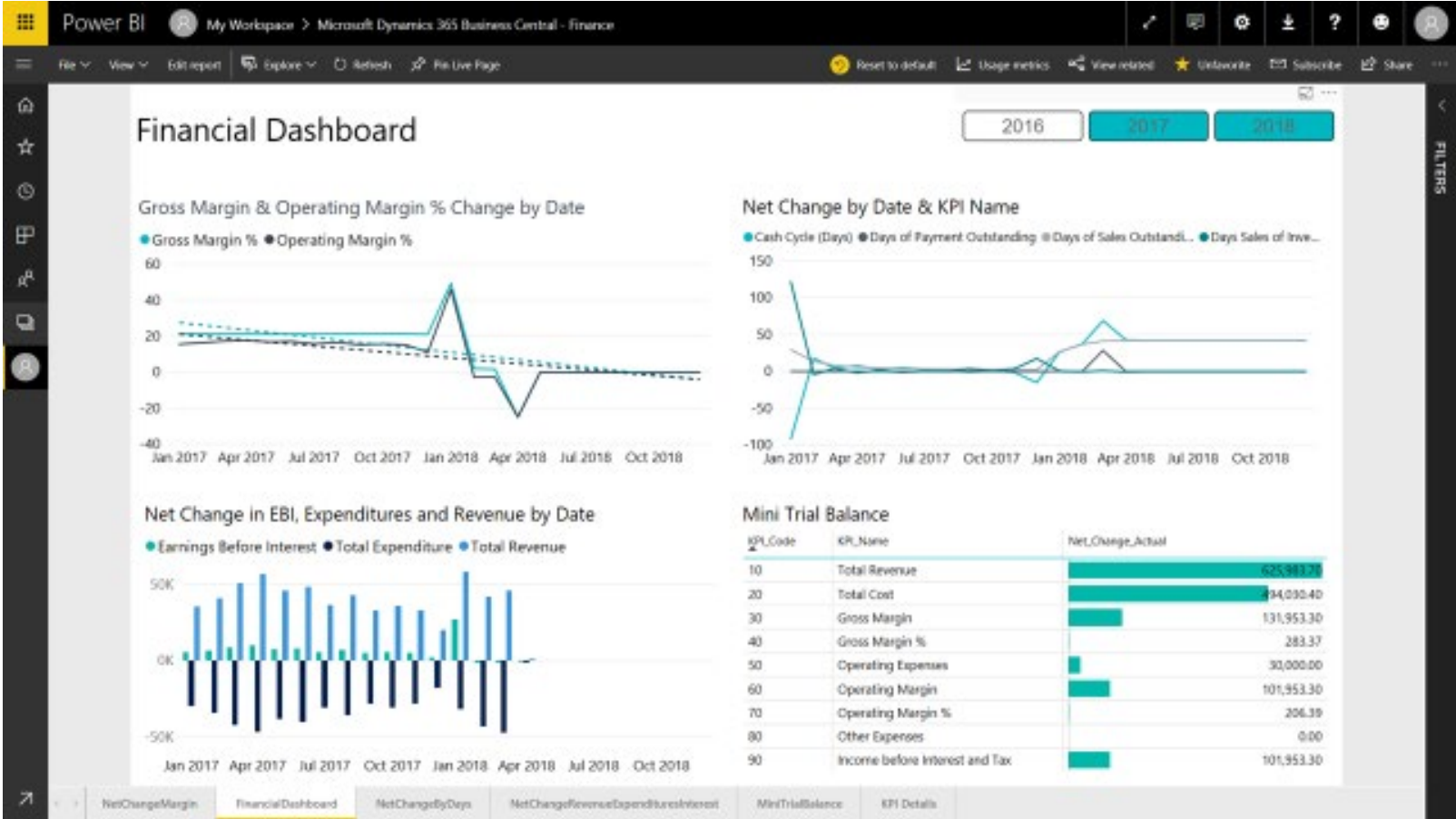
ATHENS Desk
CRONUS USA, Inc.

Item Sales & Purchase Activity - Last 12 Months

KPIs on Demand



Built in Analytics



Excel Integration



Screenshot of Microsoft Excel showing a financial statement. The ribbon includes File, Home, Insert, Draw, Page Layout, Formulas, Data, Review, View, Developer, and Help. The status bar at the bottom shows 'Average: 20'05.82543 Count: 182 Sum: 134970.02'.

No.	Name	Net Change	Balance	Income/Balance	Account Subcategory	Account Type	Gen. Posting Type	Gen. Bus. Posting Group	Gen. Prod. Posting Group	Cost Type No.	Default Deferral Template
10000	BALANCE SHEET			Balance Sheet	Assets	Heading					
10001	ASSETS			Balance Sheet	Assets	Begin-Total					
10100	Checking	2,660.24	2,660.24	Balance Sheet	Cash	Posting					
10200	Saving account			Balance Sheet	Cash	Posting					
10300	Petty Ca.	96,549.23	96,549.23	Balance Sheet	Cash	Posting					
10400	Account	72,893.84	72,893.84	Balance Sheet	Accounts Receivable	Posting					
10500	Prepaid Rent			Balance Sheet	Prepaid Expenses	Posting					
10600	Prepaid Insurance			Balance Sheet	Prepaid Expenses	Posting					
10700	Inventor	72,389.76	72,389.76	Balance Sheet	Inventory	Posting					
10800	Equipme	5,498.00	5,498.00	Balance Sheet	Equipment	Posting					
10900	Accumul	3,499.00	3,499.00	Balance Sheet	Accumulated Depreciation	Posting					
10910	WIP Job Sales			Balance Sheet	Assets	Posting					
10920	Invoiced Job Sales			Balance Sheet	Assets	Posting					
10940	Accrued Job Costs			Balance Sheet	Assets	Posting					
10950	WIP Job Costs			Balance Sheet	Assets	Posting					
10990	TOTAL AS	253,490.07	253,490.07	Balance Sheet	Assets	End-Total 10001, 10990					
20001	LIABILITIES			Balance Sheet	Liabilities	Begin-Total					
20100	Account	-51,750.97	-51,750.97	Balance Sheet	Current Liabilities	Posting					
20200	Purchase Discounts			Balance Sheet	Current Liabilities	Posting					
20300	Purchase Returns & Allowances			Balance Sheet	Current Liabilities	Posting					
20400	Deferred Revenue			Balance Sheet	Current Liabilities	Posting					
20500	Credit Cards			Balance Sheet	Current Liabilities	Posting					
20600	Sales Tax	-9,850.16	-9,850.16	Balance Sheet	Current Liabilities	Posting					
20700	Accrued Salaries & Wages			Balance Sheet	Provisional Liabilities	Posting					

Excel Integration



Power BI My Workspace > Business Central Customer Ledger Entries

Excel Online Edit

DATA REFRESH NOT SUPPORTED Reload Data Pin

Document_Type	Invoice						
Sum of Amount	Column Labels						Grand Total
Row Labels	10000	20000	30000	40000	50000		
2017	\$ 172,701.12	\$ 39,046.42	\$ 178,950.28	\$ 56,152.32	\$ 66,997.95	\$ 513,848.09	
2018	\$ 64,313.16	\$ 22,560.32	\$ 59,998.65	\$ 20,302.40	\$ 21,995.85	\$ 189,170.38	
Grand Total	\$ 237,014.28	\$ 61,606.74	\$ 238,948.93	\$ 76,454.72	\$ 88,993.80	\$ 703,018.47	

PivotChart Fields

Choose fields:

- Posting_Date
- Payment_Method_Code
- Document_Type
- Message_To_Recipient
- Document_No
- Debit_Amount
- Customer_No
- Description
- Amount
- Remaining_Amount
- Due_Date
- Pmt_Discount_Date
- Original_Pmt_Disc_Possible
- Credit_Amount
- On_Hold
- Debit_Amount_LCY
- Bal_Account_Type
- Credit_Amount_LCY
- ...

Drag fields between areas below:

FILTERS
Document_Type

LEGEND (SERIES)
Customer_No

AXIS (CATEGORIES)
Years
Quarters
Posting_Date

VALUES
Sum of Amount

Outlook Integration



Inbox - admin@MSDIR2018PTSCRAIG.OnMicrosoft.com - Outlook

File Home Send / Receive Folder View Help Tell me what you want to do

Search Current Mailbox Current Mailbox

Focused Other By Date

Last Week

- Robert Townes
Request for a quote on some furniture
Hello MOD, We are planning an office
Fri 9/28
- Meagan Bond
Can you remind me how much I owe you?
Hi MOD, I know I owe you money, but I can't
Fri 9/28
- Wide World Importers**
Thank you for your business! - Invoice 103073
Hello MOD, Here is the invoice for your
Fri 9/28
- Sally McArthur
Hello!
Hello MOD, This email is just to introduce
Fri 9/28
- Peter Saddow
Discount on Quote S-QUO1001
Hi MOD, I'm working with Trey Research on
Fri 9/28

Reply Reply All Forward

Wide World Importers <wide.world.importers@con> 1 1 Fri 9/28

Thank you for your business! - Invoice 103073

Wide World Importers - Invoice PS-INV103073.PDF 70 KB

Hello MOD,

Here is the invoice for your recent furniture order. Thank you for your business!

Invoice No. 103073 **Wide World Importers**

CRONUS USA, Inc.
7122 South Ashford Street
Atlanta, GA 31722

Item	Description	Ship Date	Qty.	Unit Price	Total
1928-S	Amsterdam Lamp	9/28/2018	50	42.80	2,140.00
2000-S	Sydney Swivel Chair	9/28/2018	42	148.10	6,220.20
Subtotal					\$8,360.20
Tax					\$501.61
Total					\$8,861.81

Best regards,
Wide World Importers

wide.world.importers@contoso.com
(701) 555-0151

Business Central

107214 · Wide World Importers

Details Edit Pop Out Refresh

General Show more

Vendor Name: Wide World Importers

Contact: Toby Rhode

Posting Date: 4/9/2018

Due Date: 4/30/2018

Vendor Invoice No.: 102446

Lines

Type	No.	Description/Comment	Locat
Item	1928-S	AMSTERDAM Lamp	
Item	2000-S	SYDNEY Swivel Chair, green	

Subtotal Excl. Tax (USD): 8,360.20

Inv. Discount Amount (USD): 0.00

Items: 5 Unread: 2 Reminders: 46

This folder is up to date. Connected to: Microsoft Exchange

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, or as commonly referred to as 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 increase 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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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 a trigger 'Item added' in the HR lane, followed by a task 'Get item details' in the HR lane, and then a task 'Send an email to HR' in the HR lane. A decision diamond 'Check department' is in the Business lane, with a 'None' path leading to a task 'Send an email to HR' in the HR lane. A 'Done' button is visible in the center of the diagram.

A modal dialog box is open in the center, displaying a green checkmark and the text: 'Your flow was created. Your flow was successfully created! To make changes to it, go to Microsoft Flow.' Below the text is a blue 'Done' button.

On the right side, the 'Triggers and Actions' pane is visible, showing a search bar and a list of triggers. 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)
- SharePoint - When a file is created in a folder

The 'Shape Data - Task...' pane is also visible, showing properties for a task:

Property	Value
Documentation	
LoopType	None
TaskType	None
IsForCompensation	FALSE
BoundaryType	Default
Function	Techn
Connector	Share
Trigger	When

Microsoft Power Automate

The screenshot shows the Microsoft Power Automate templates page. The browser address bar is flow.microsoft.com/en-us/templates/. The page features a search bar, navigation tabs, and a grid of 12 template cards.

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

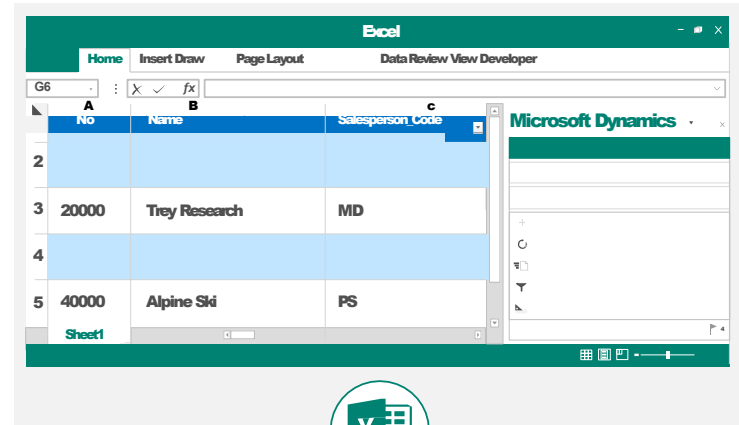
Simplify reporting and make better decisions

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.

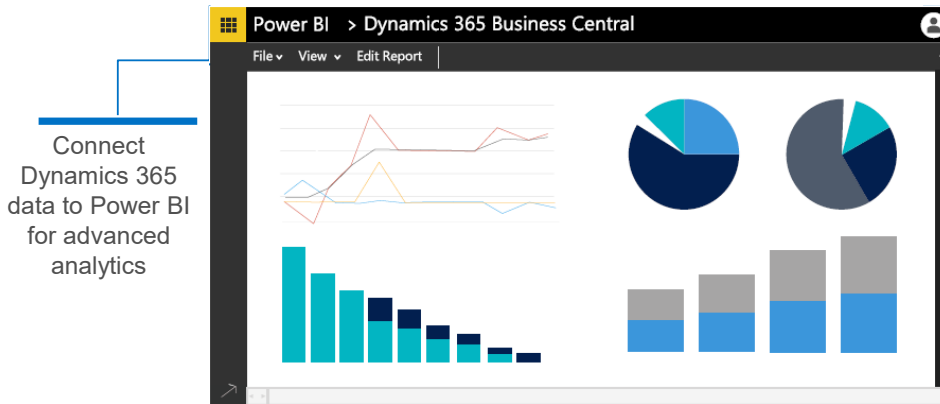
Her day starts in the Dynamics 365 app, where she is preparing the monthly P&L statement. She needs to edit multiple invoices at once, so she opens the invoice list in Microsoft Excel. In a matter of minutes, she adds a new batch of invoices and updates the status of several others. With just one click,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



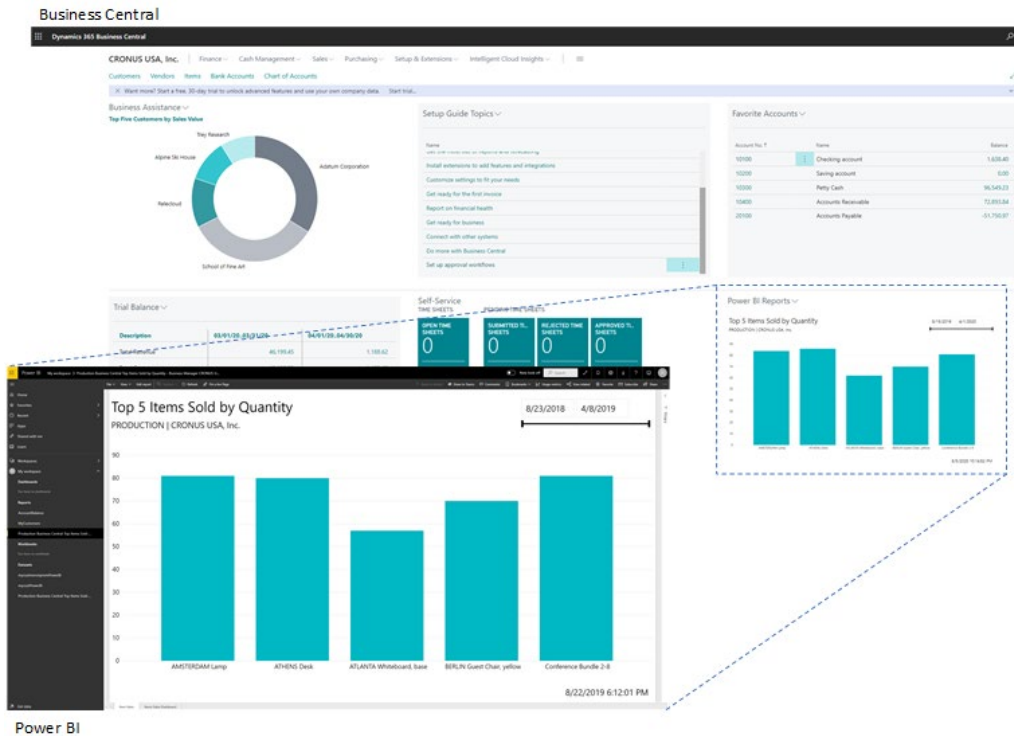
Refresh data in Excel without having to return to the financial system



Connect Dynamics 365 data to Power BI for advanced analytics



Business Central's Reporting Dashboard



Power BI

- Business Central incorporates data visualization tools which present live data right from the home screen
- This can include standard charts or custom PowerBI reports



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Microsoft Power BI



Dynamics BC – Industry Fitness

- Distributors
- Discreet Manufacturers
- Wholesale Trade
- Private Equity Firms
- Nonprofits & Social Services
- Professional/Consulting Services
- Software Development & Services
- Research Organizations
- Convention/Events Organizations

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Extensive Eco System

The screenshot shows the Microsoft AppSource website interface. At the top, there are browser tabs for 'KMnet Home Page - Home' and 'Microsoft AppSource - destinatic'. The address bar shows 'appsource.microsoft.com/en-us/'. The Microsoft logo and 'AppSource' branding are visible, along with a search bar and navigation links for 'United States | EN'. The main heading reads 'Get the right app for your business needs' with a subtext: 'Find solutions that enable innovation, drive business outcomes, and help you get more done with what you already have.' Below this is a call to action: 'Explore business solutions now' with a 'See all apps' button. A grid of category buttons is displayed under the 'Categories' tab, including: AI + Machine Learning, Analytics, Collaboration, Commerce, Compliance & Legal, Customer Service, Finance, Geolocation, Human Resources, Internet of Things, IT & Management Tools, Marketing, Operations & Supply Chain, Productivity, and Project Management.

Bill.com at a Glance

85%
of the Top 100
U.S. Accounting
Firms

\$140 B
Processed
annually

135,000+
Businesses
use Bill.com

3.2 M
Members
paying
and getting
paid

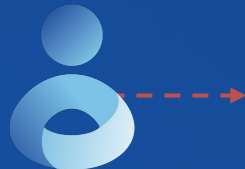


Financial Back-Office Solution

- Simplify operations
- Make & receive payments
- Manage budgets and cash flow



Bill.com creates AP efficiency with 4 simple steps



Capture

Approve

Pay

Reconcile

Receive POs and Invoices in Bill.com inbox. IVA codes the bill in real time.

View and approve bills online from any device

Make domestic ACH, international wire, virtual card or check payments with a click

Automatic sync with your accounting system, easy audits

Paperless

Automated

Secure

Efficient

Assessing Your Needs – Top 10 Drivers

- Are you using older or outdated business applications?
- Are most of your key systems still on-premise?
- Are your processes inefficient? Data entered in multiple places?
- 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 your systems making your employees more productive?
- Are you enabling tighter linkages with customers and suppliers?
- Are your systems helping you gain competitive advantage?



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Concluding Comments

- Pathway towards leveraging updated Financial/ERP systems to achieve digital transformation varies from one organization to another.
 - One size does not fit all!
 - Simpler is better
 - Strategic clarity is needed
- What is your roadmap?
 - 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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