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

1 AI Platform & MS Research (25+ years)

- 18,000+ Patents — Human Parity Machine Learning
- Cognitive Services — Decision, Language, Speech, Vision

2 LinkedIn

- 720M+ Professionals
- Sales Navigator

3 Microsoft 365

135M+ Users

- Identity
- Outlook
- Teams — 115M+ Daily Active Users
- Office
- Sharepoint
- OneDrive
- Excel

4 Dynamics 365

- Marketing
- Sales
- Customer Service
- Virtual Agents
- Field Service
- Product Visualize
- Remote Assist
- Commerce
- Connected Store
- Fraud Protection
- Supply Chain
- Guides
- HR
- Finance
- Project Operations
- Business Central

5 Power Platform

- Power BI — 7M Users
- Power Apps
- Power Automate
- Power Virtual Agents
- Power Portals

Customer Data Platform (CDP)

- Customer Insights
- Customer Voice

6 Dataverse

- Dataverse for Teams
- Common Data Model
- Cloud Services APIs
- 400+ Connectors

SAP, salesforce

7 Azure (600+ Services)

- AI & ML
- Analytics
- Blockchain
- Compute
- Containers
- Databases
- Dev Tools
- DevOps
- IoT
- Media
- Networking
- Security
- Storage

200 Microsoft Services

Security

Microsoft Security Response Center

Microsoft Trust Center

7 Trillion cyber events daily = Threat Intelligence

Compliance

Transparency

nickfratello V.2020.02

Business Central

Microsoft Dynamics 365

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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.

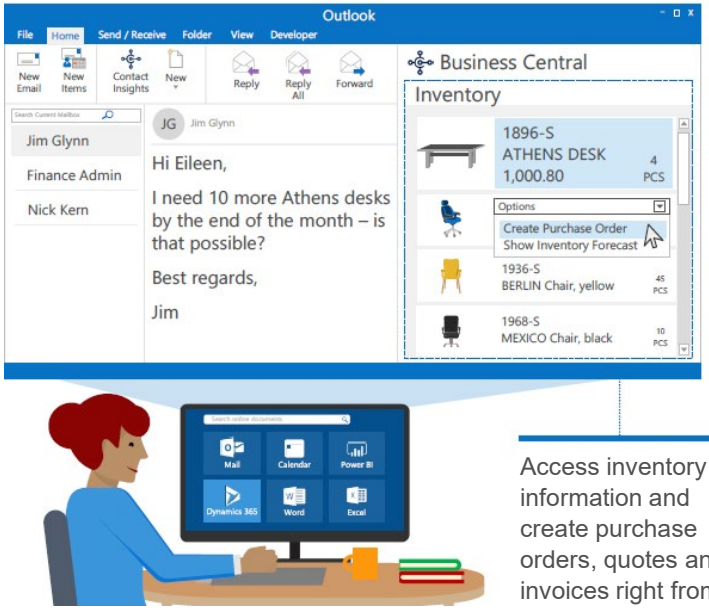
Together, Microsoft Dynamics 365 Business Central and Office 365 help you:

- 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.

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

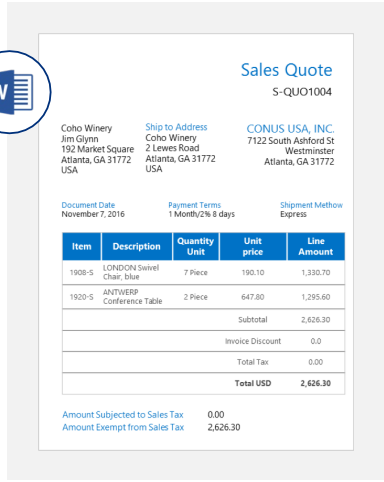
You know how critical it is to keep your sales team connected in the office and on the go. Dynamics 365 and Office 365 simplifies and automates daily tasks to keep your sales team focused on managing sales.

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.

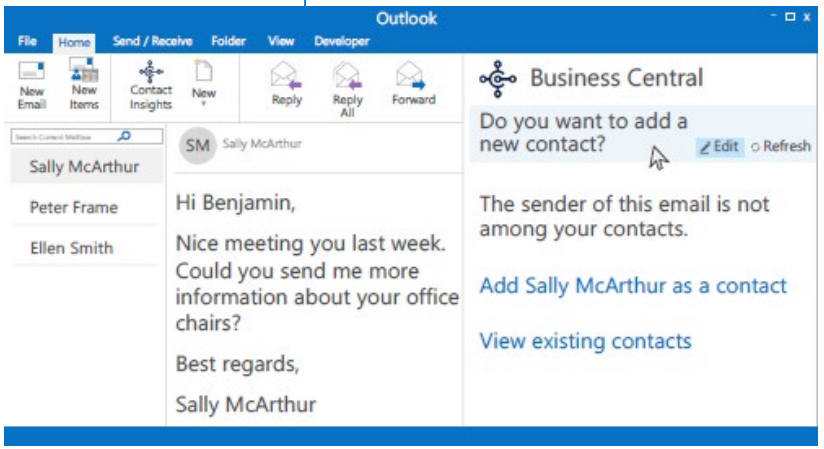
While he was sending the sales quote, a note hit his inbox from a potential customer he met at a recent event. The system recognizes that their email address is not in the customer database, and prompts him to add them. Without leaving Outlook, he creates their profile in the Dynamics 365 app.

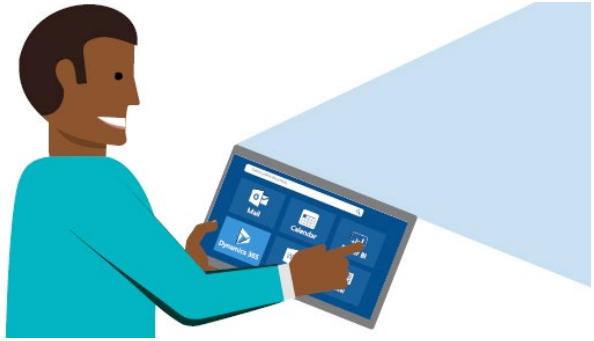
This kind of automation reduces time spent on administrative tasks, allowing your sales team to quickly respond to inquiries and ultimately improve customer interactions.

Use Microsoft Word to modify quote and invoice templates in Dynamics

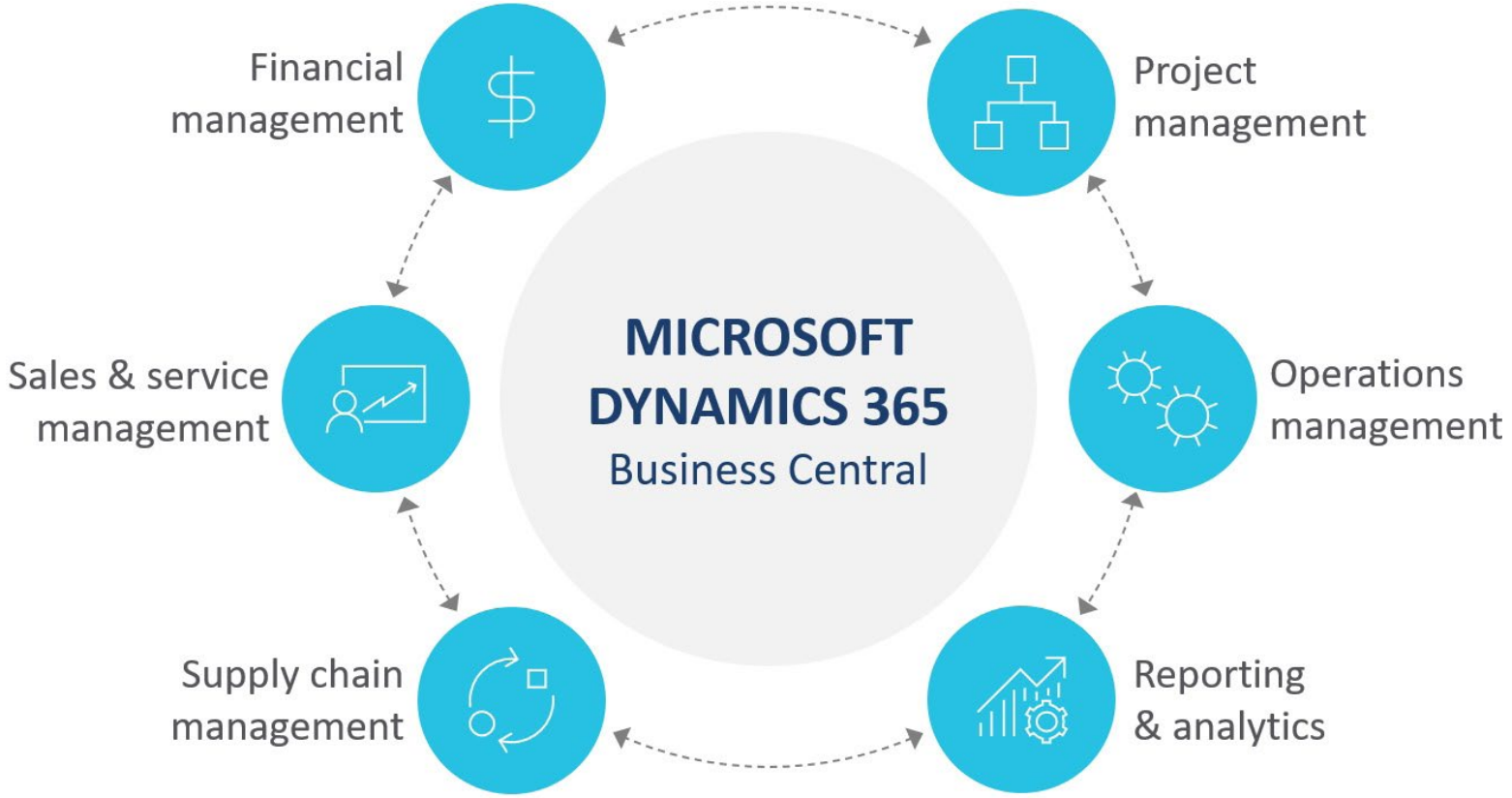


Set up or update customers and vendors in Dynamics 365 from Outlook

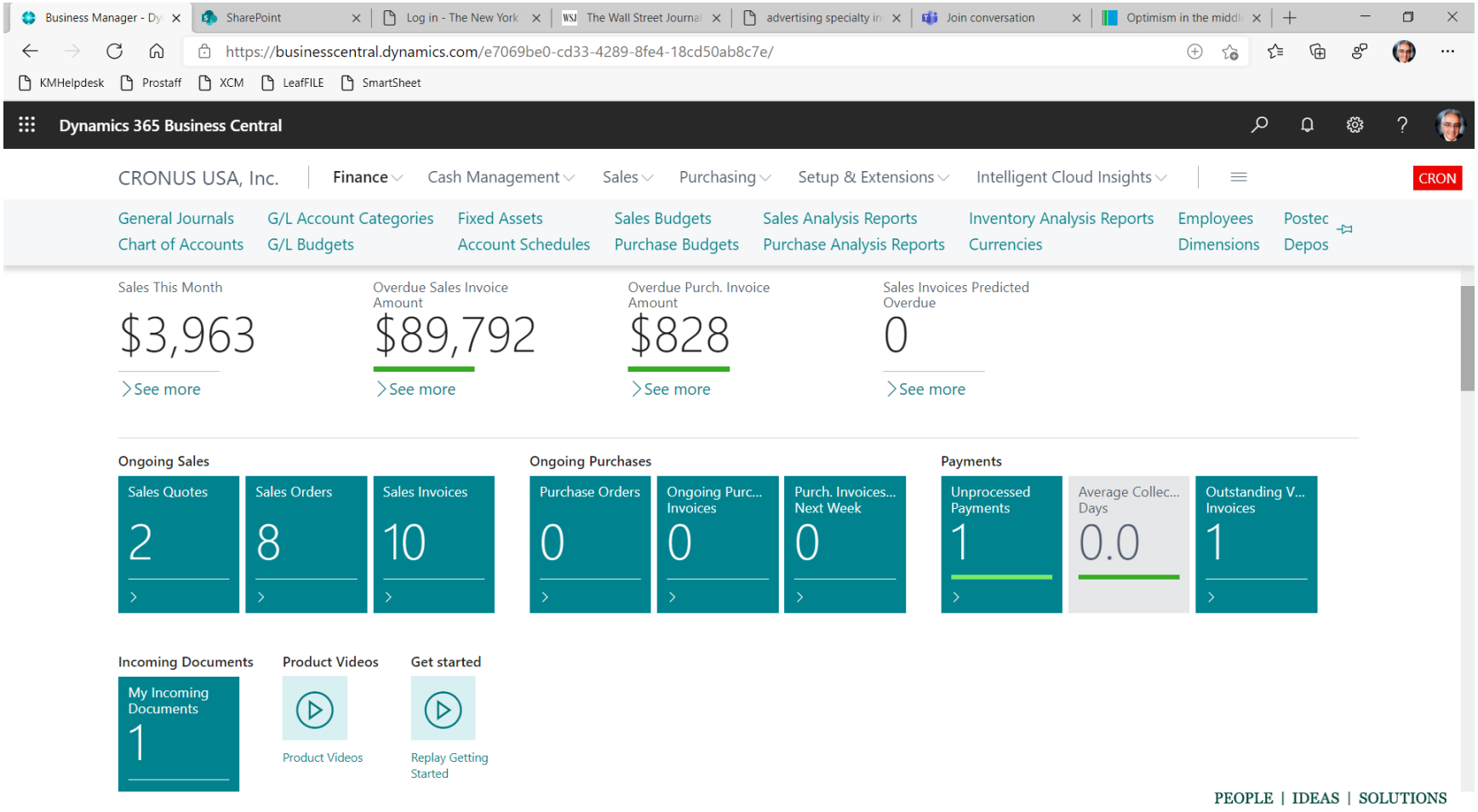




Dynamics BC Components

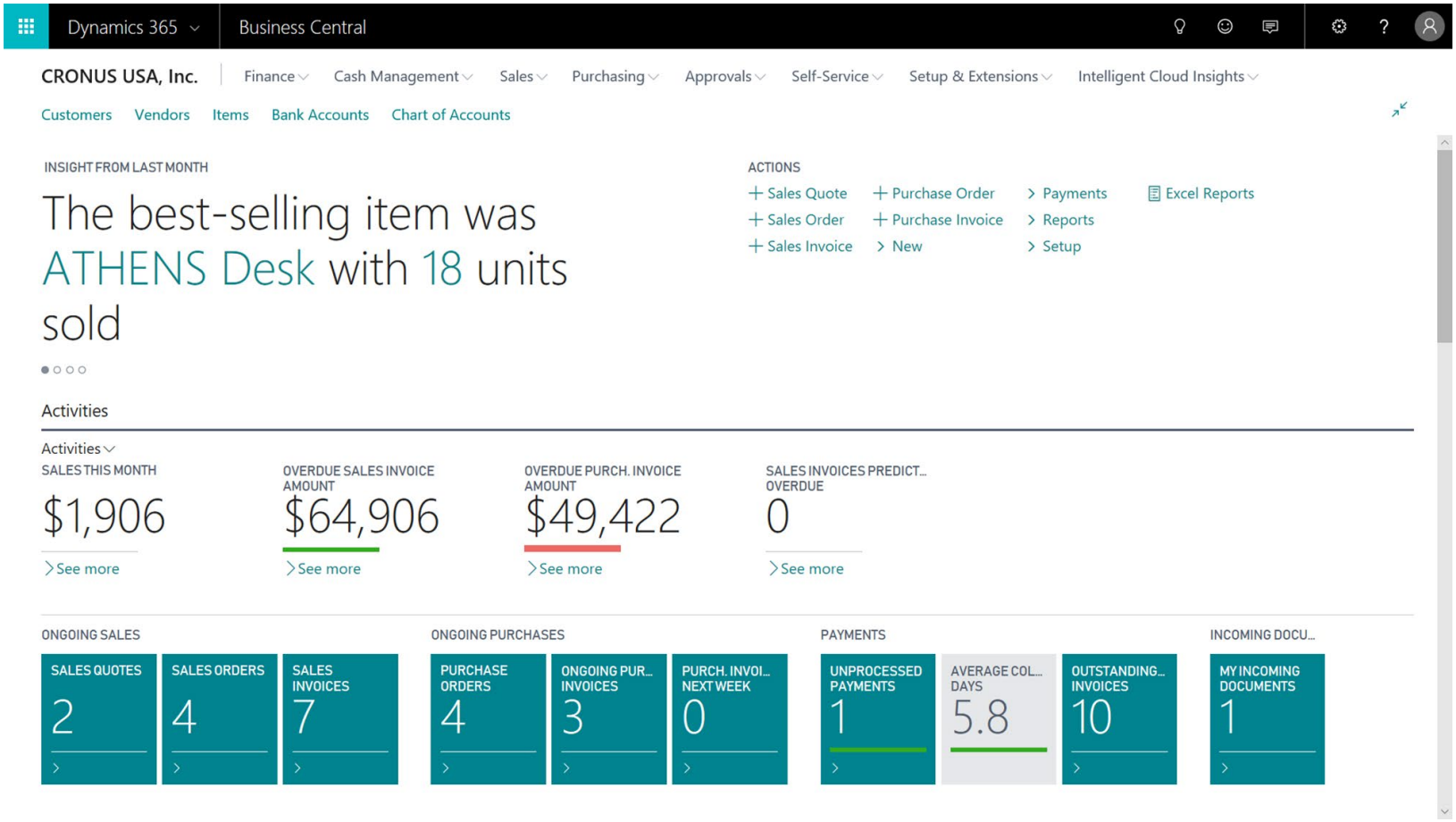


Built in Workbench



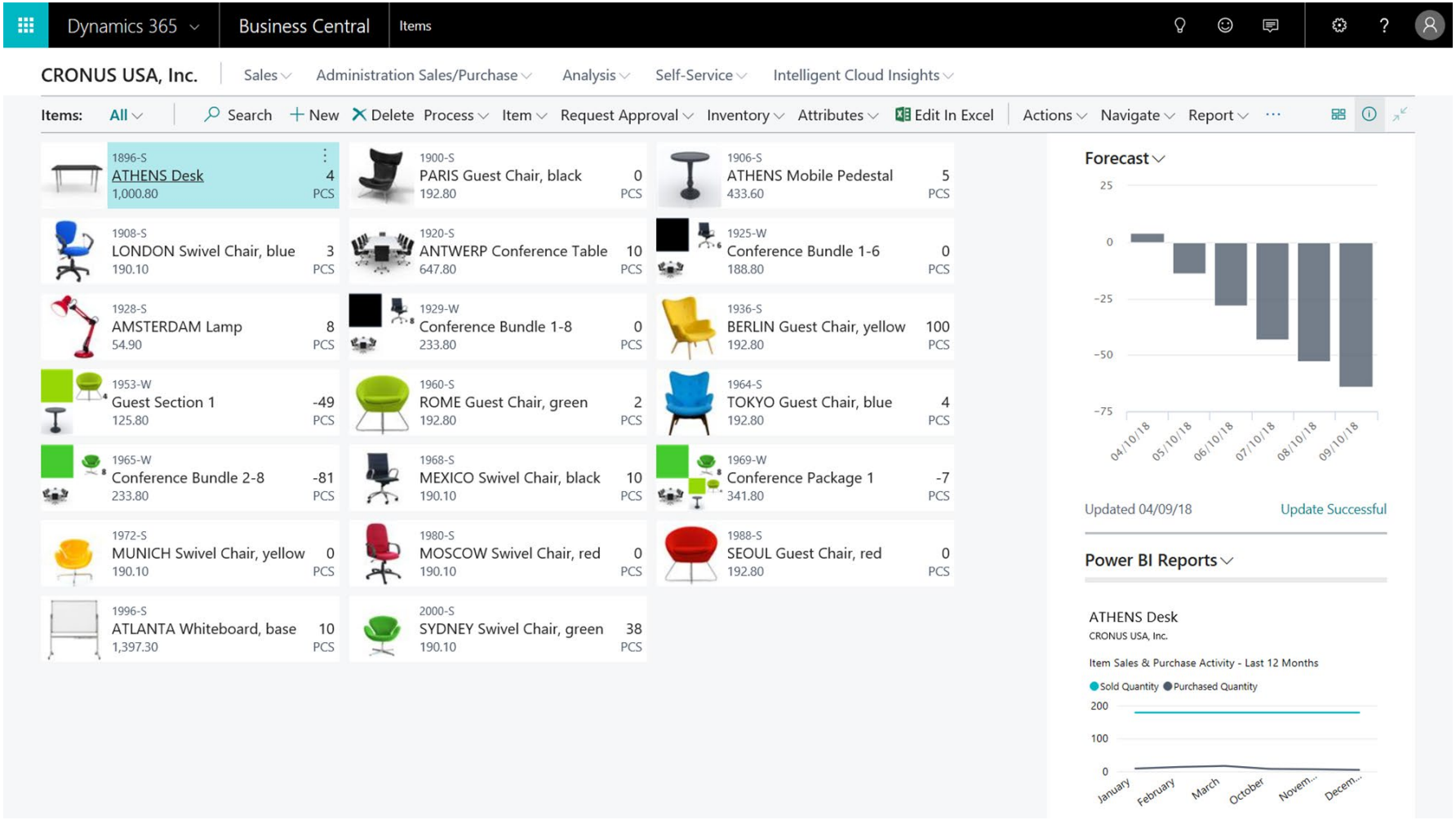
Keeping You Updated!

Microsoft Dynamics 365



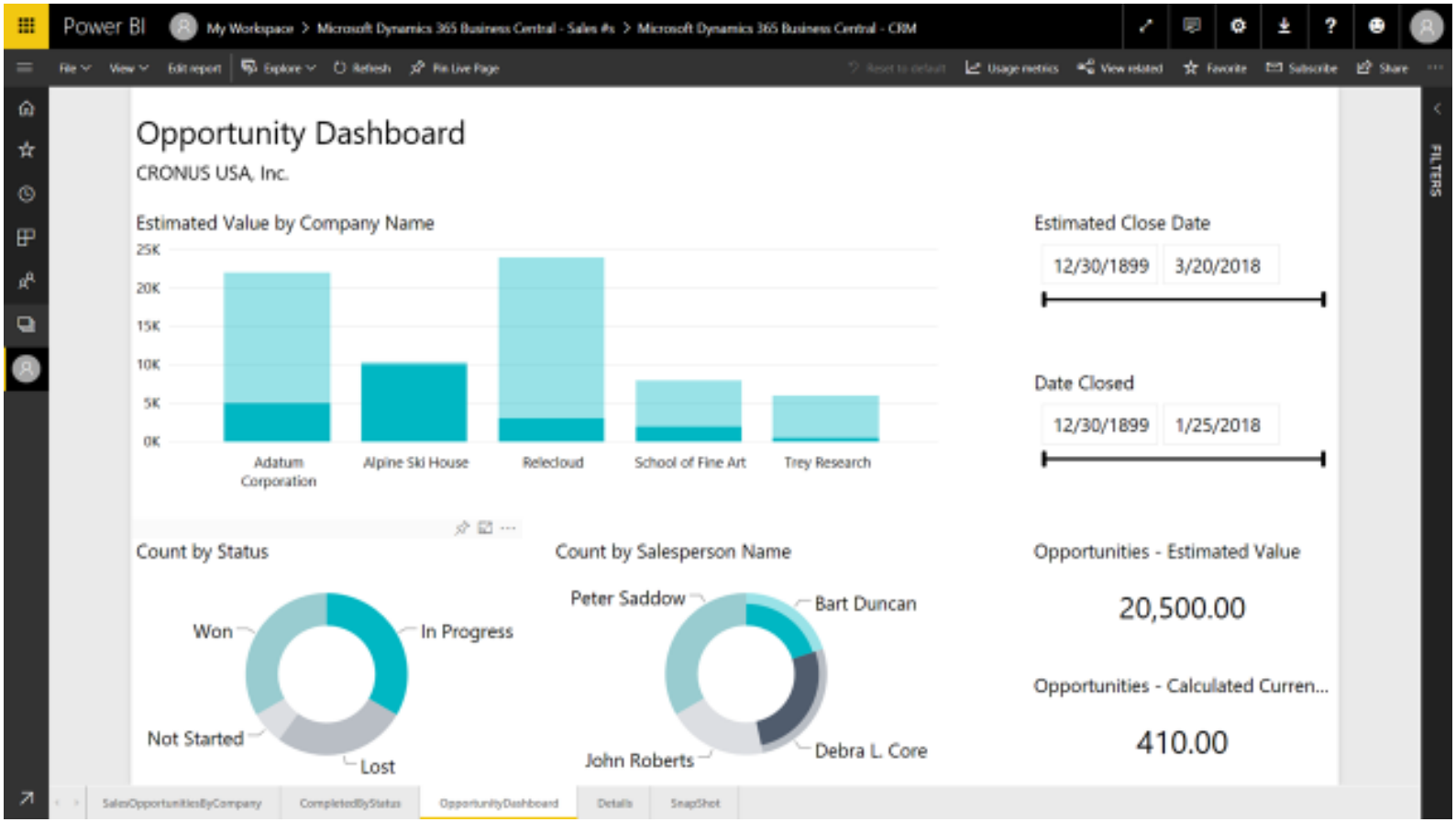
Efficient User Interface

Microsoft Dynamics 365



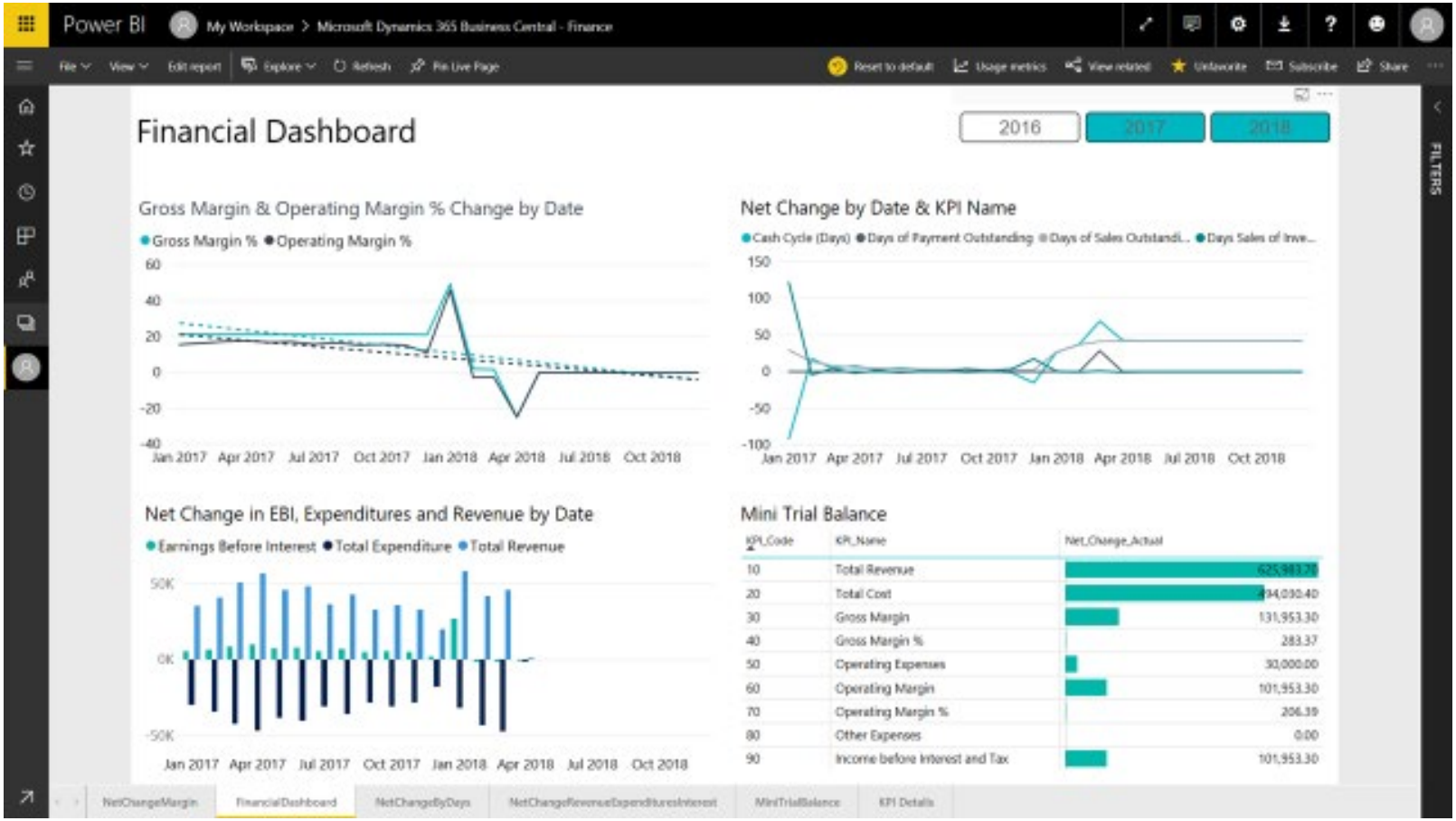
KPIs on Demand

Microsoft Dynamics 365



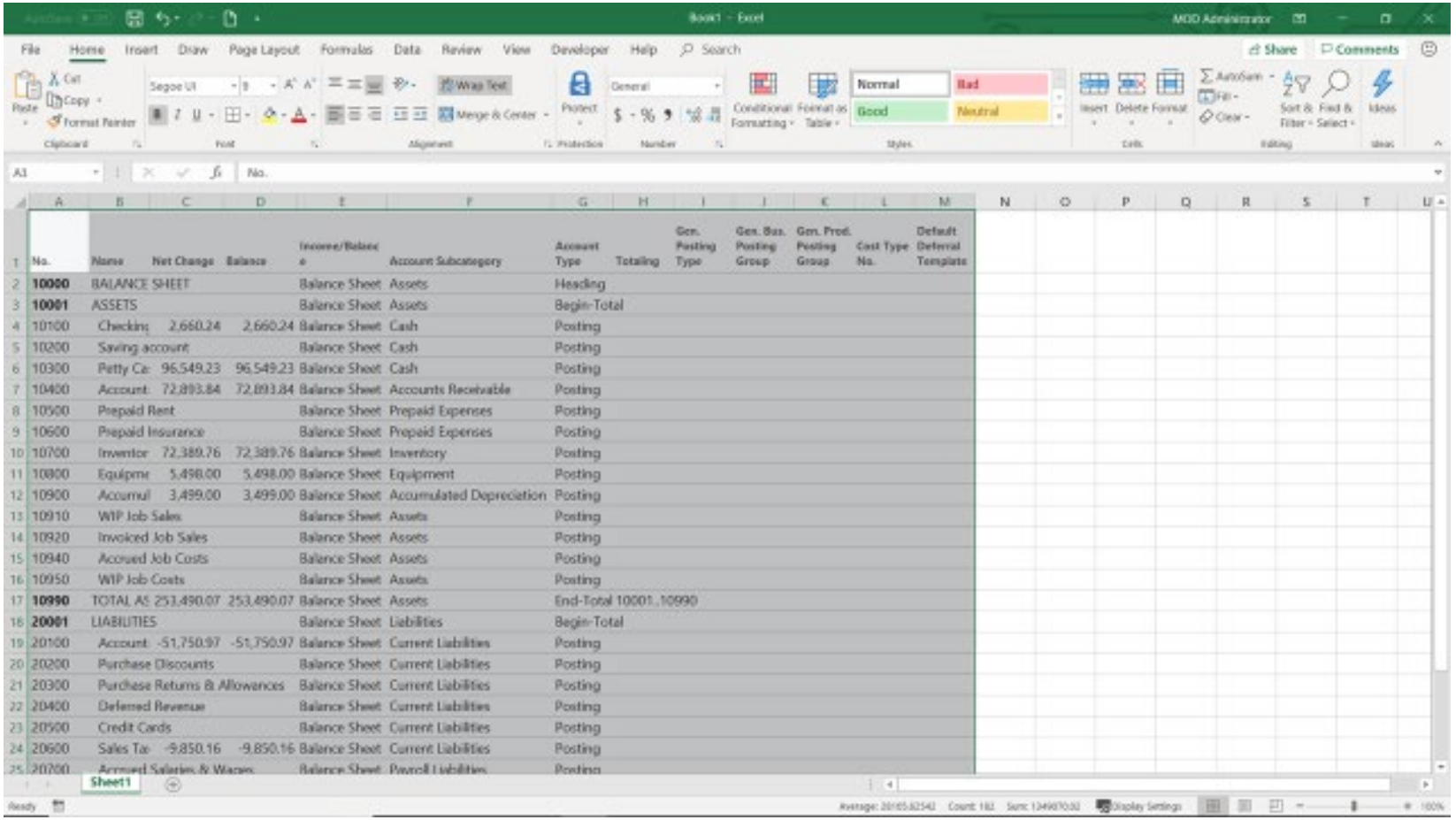
Built in Analytics

Microsoft Dynamics 365



Excel Integration

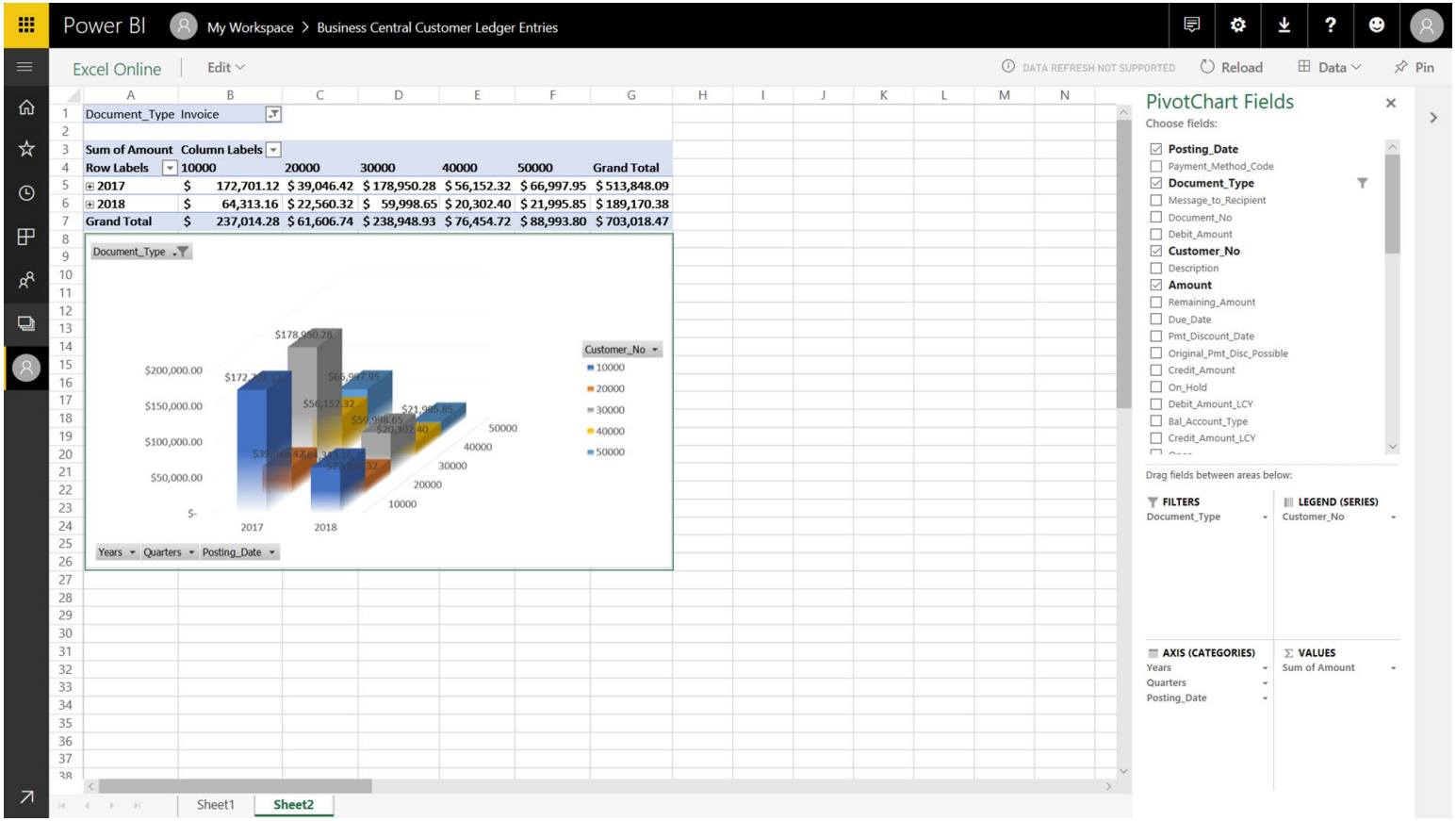
Microsoft Dynamics 365



No.	Name	Net Change	Balance	Income/Balance	Account Subcategory	Account Type	Totaling	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	Payroll Liabilities	Posting						

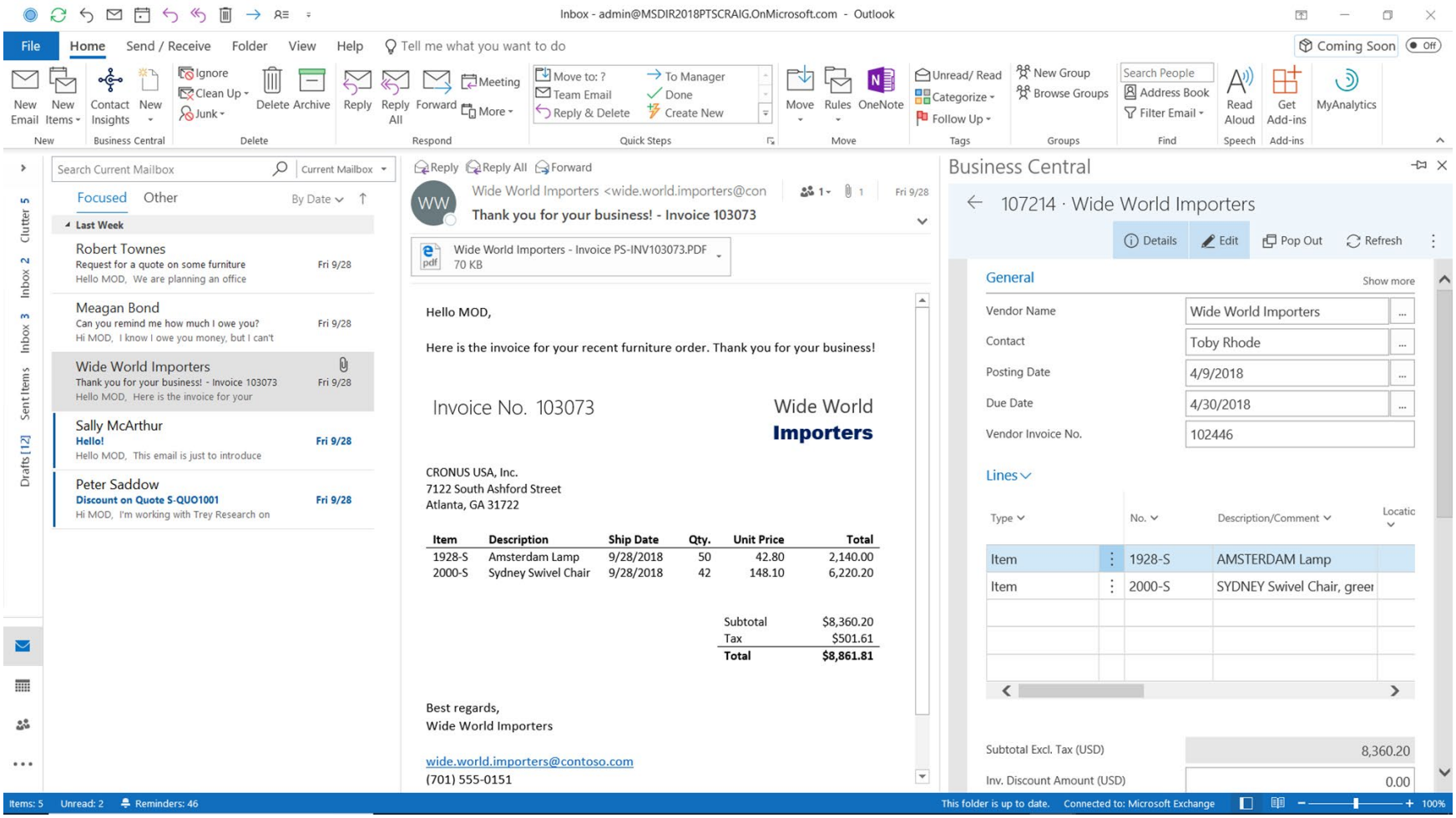
Excel Integration

Microsoft Dynamics 365



Outlook Integration

Microsoft Dynamics 365



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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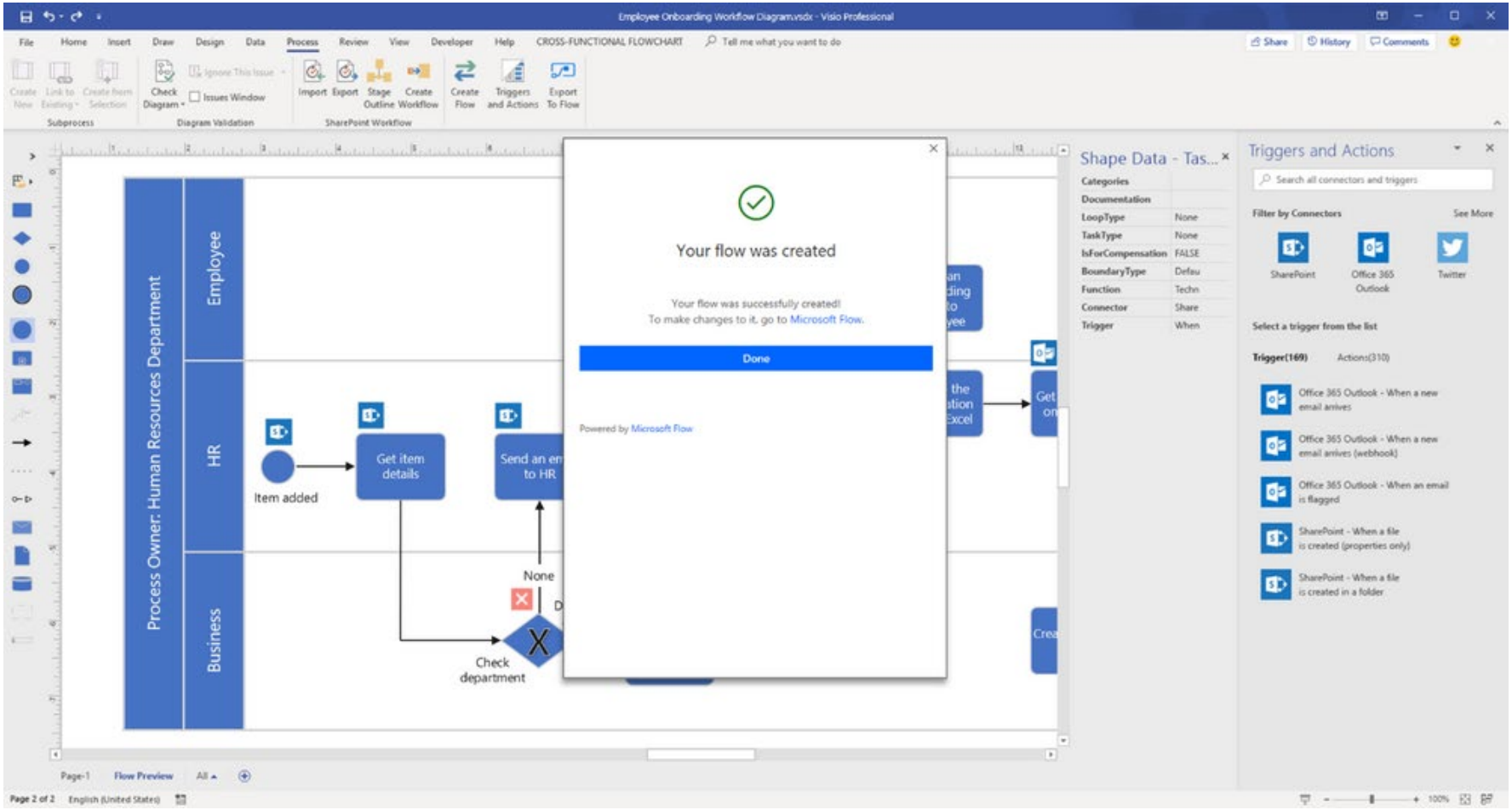
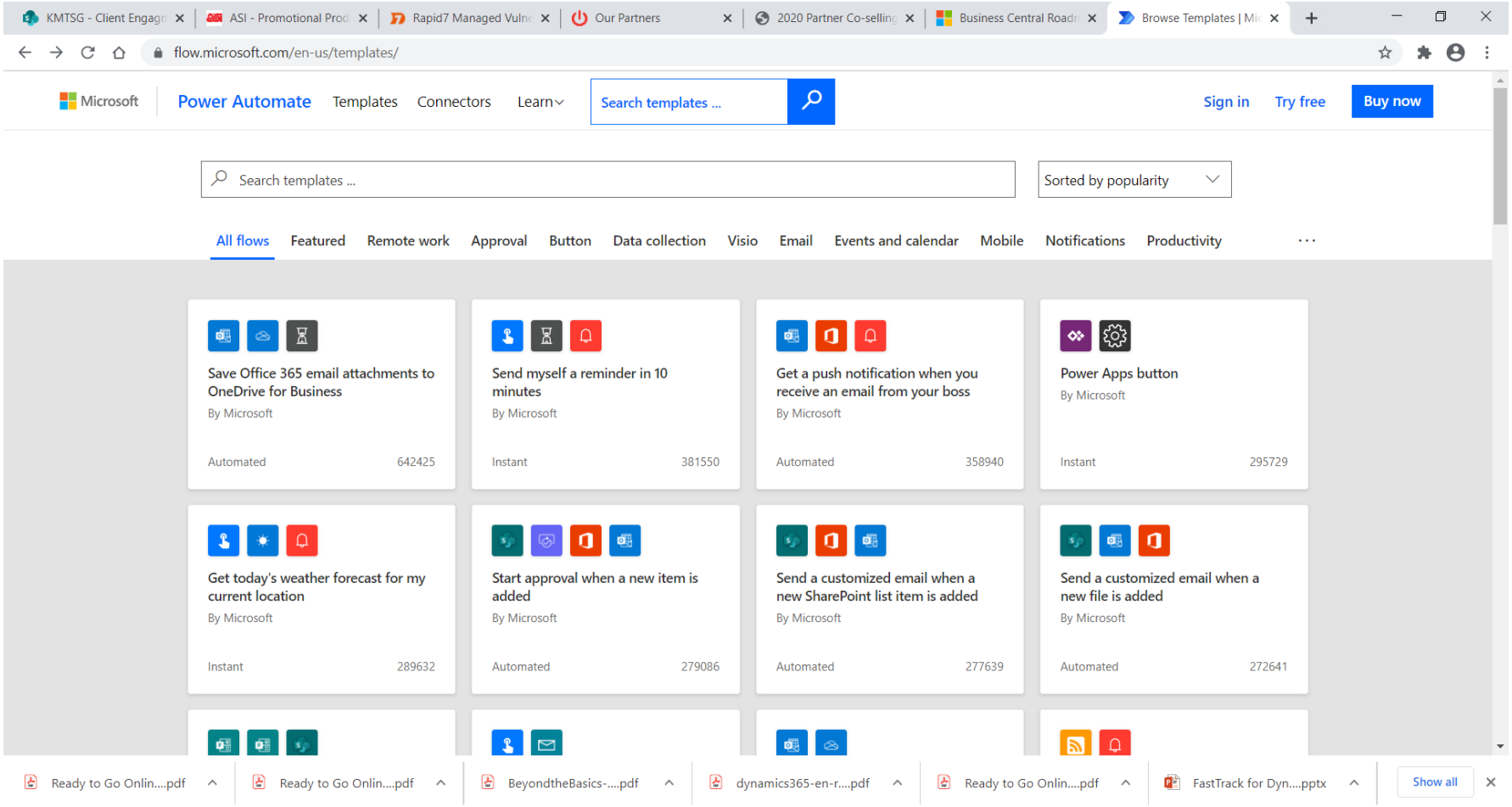
Microsoft Power Automate



Microsoft Power Automate



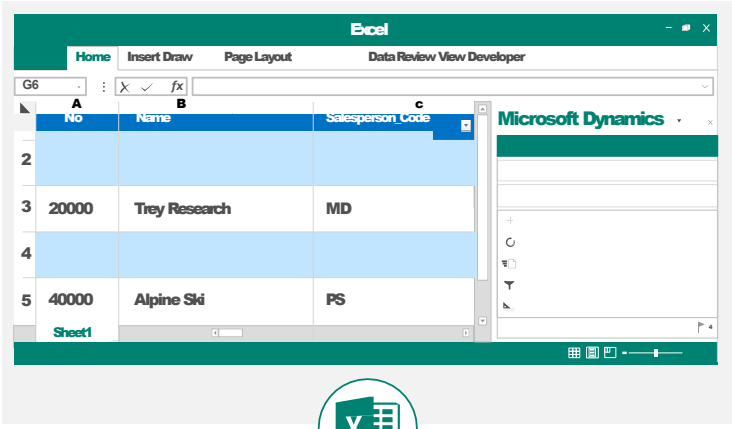
Simplify reporting and make better decisions

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.

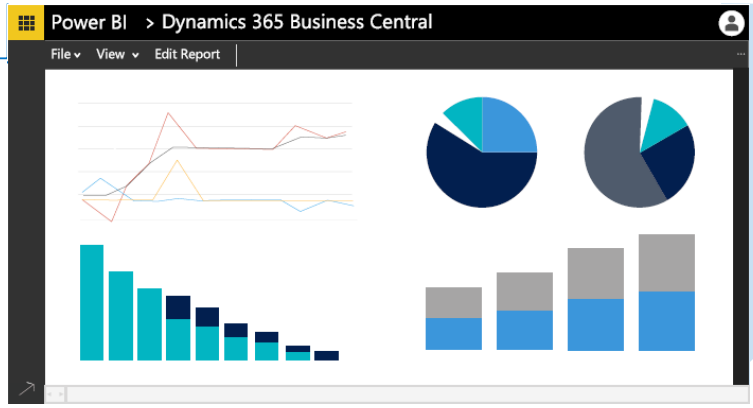
Wanting a deeper analysis of the month's revenue, she switches to Microsoft Power BI. There she has multiple ways to analyze Dynamics 365 data, including the revenue information she just updated. Through rich visuals and custom dashboards, she gains insights she couldn't get from standard reports.

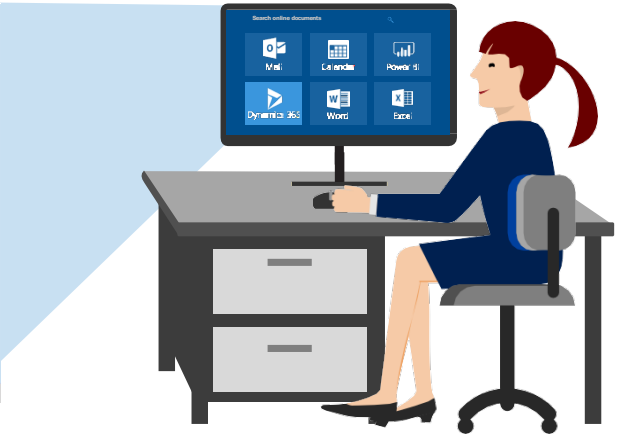
With Dynamics 365 Business Central, you get an end-to-end view of your business and built-in intelligence that helps you make more informed decisions.



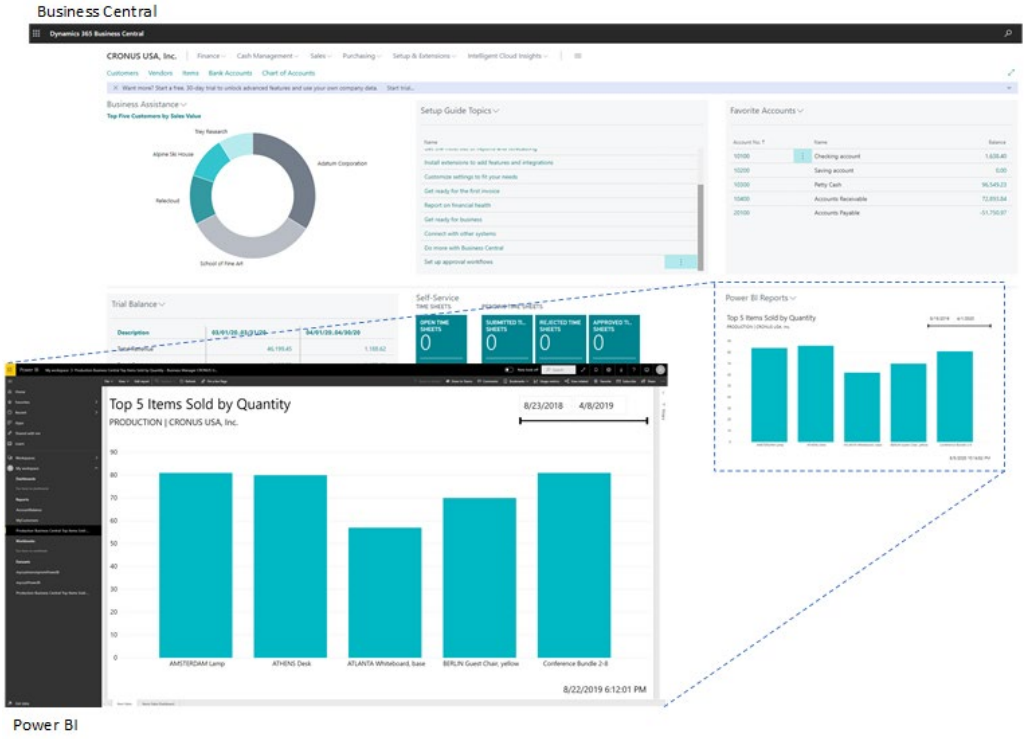
Refresh data in Excel without having to return to the financial system

Connect Dynamics 365 data to Power BI for advanced analytics





Business Central's Reporting Dashboard



- 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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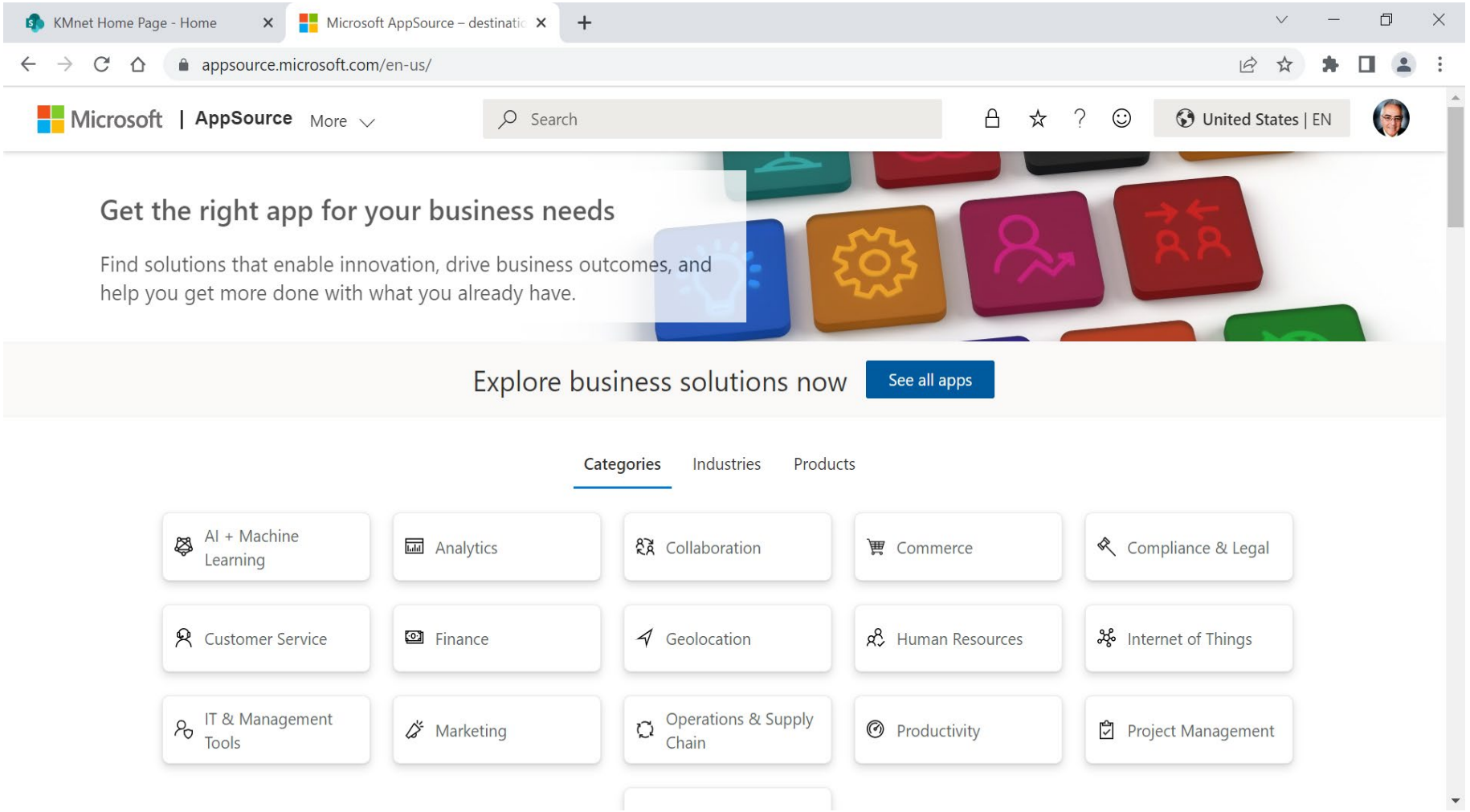
Extensive Eco System



bill.com
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
Microsoft

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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