

Microsoft ERP Promise Opportunities & Challenges

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ERP Evolution

- Updated ERP and financial systems form the backbone of an organization's digital nervous system.
- All processes within an organization need to be reflected in some shape or form within the ERP/financial system to enable capture of all activities and their impact on the organization's performance.
- ERP systems and capabilities have evolved:
 - Core Operations to Finance additions
 - CRM, WMS, SCM and e-Commerce extensions
 - Analytics and BI evolution
 - HRIS and Social XRP enablement
 - AI Enabled Innovations
- Outdated and poorly integrated/enabled systems pose a significant obstacle towards the digital transformation journey!

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.

ERP Solution Approaches

All-in-one

- Using one primary software solution to handle various facets of the company.

Best of Breed

- Using several software applications and providers to satisfy the needs.

Going All in with the Cloud

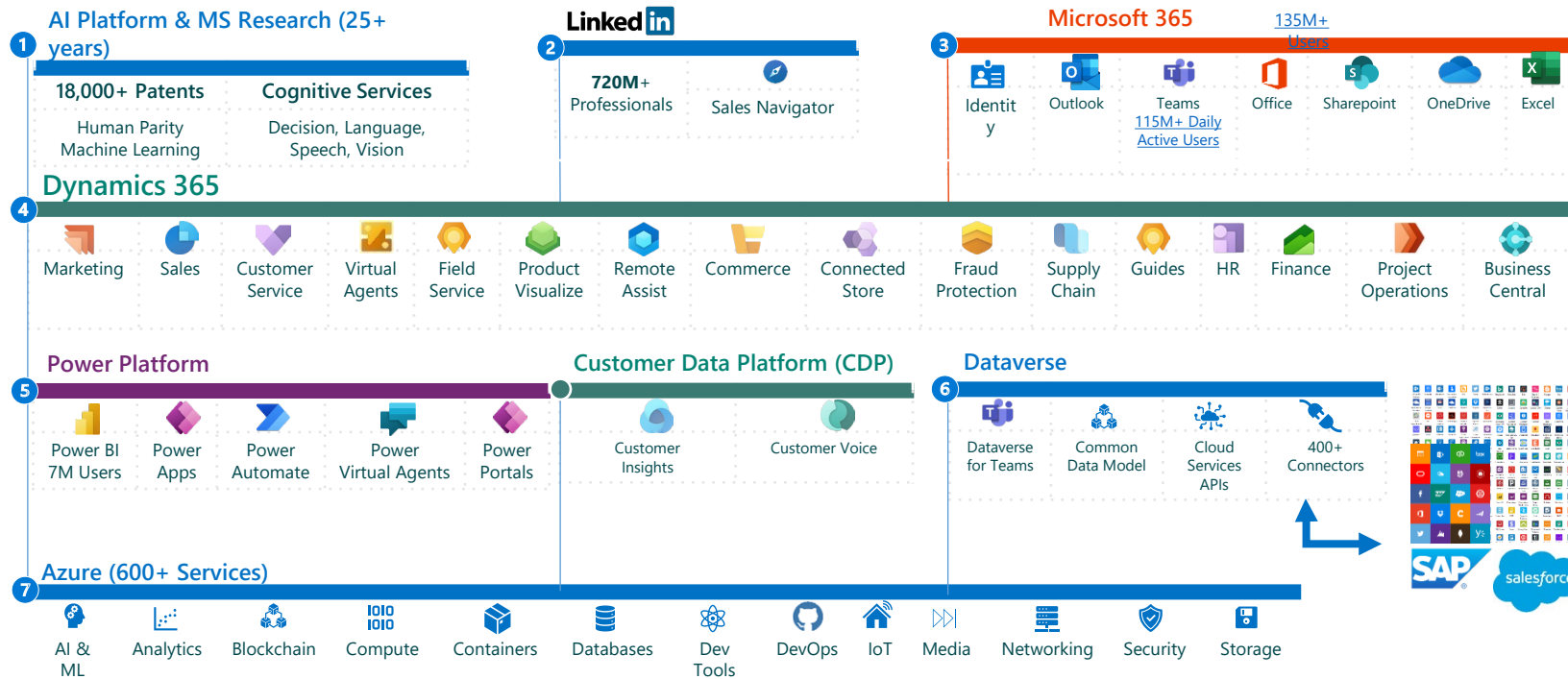


Microsoft Platform Highlights

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**.

- 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



Microsoft Cloud Platform



Dynamics BC Components



Keeping You Updated!



The screenshot shows the Microsoft Dynamics 365 Business Central interface for 'CRONUS USA, Inc.'. The top navigation bar includes 'Dynamics 365' and 'Business Central'. Below it, a menu lists various functional areas: Finance, Cash Management, Sales, Purchasing, Approvals, Self-Service, Setup & Extensions, and Intelligent Cloud Insights. A secondary menu lists 'Customers', 'Vendors', 'Items', 'Bank Accounts', and 'Chart of Accounts'. The main content area features an 'INSIGHT FROM LAST MONTH' section with a key metric: 'The best-selling item was ATHENS Desk with 18 units sold'. To the right of this insight is an 'ACTIONS' menu with options like '+ Sales Quote', '+ Sales Order', '+ Sales Invoice', '+ Purchase Order', '+ Purchase Invoice', '+ New', '> Payments', '> Reports', '> Setup', and 'Excel Reports'. Below the insight is an 'Activities' section with a dropdown menu. The dashboard includes several key performance indicators (KPIs) in a grid format:

SALES THIS MONTH	OVERDUE SALES INVOICE AMOUNT	OVERDUE PURCH. INVOICE AMOUNT	SALES INVOICES PREDICT. OVERDUE
\$1,906	\$64,906	\$49,422	0

Each KPI card has a '> See more' link. Below the KPIs are four main categories with sub-cards:

- ONGOING SALES:** SALES QUOTES (2), SALES ORDERS (4), SALES INVOICES (7)
- ONGOING PURCHASES:** PURCHASE ORDERS (4), ONGOING PURCH. 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

Outlook Integration



Inbox - admin@MSDIR2018PTSCRAIG.OnMicrosoft.com - Outlook

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

Business Central

107214 · Wide World Importers

Wide World Importers <wide.world.importers@contoso.com> - 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

General

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	Location
Item	1928-S	AMSTERDAM Lamp	
Item	2000-S	SYDNEY Swivel Chair, green	

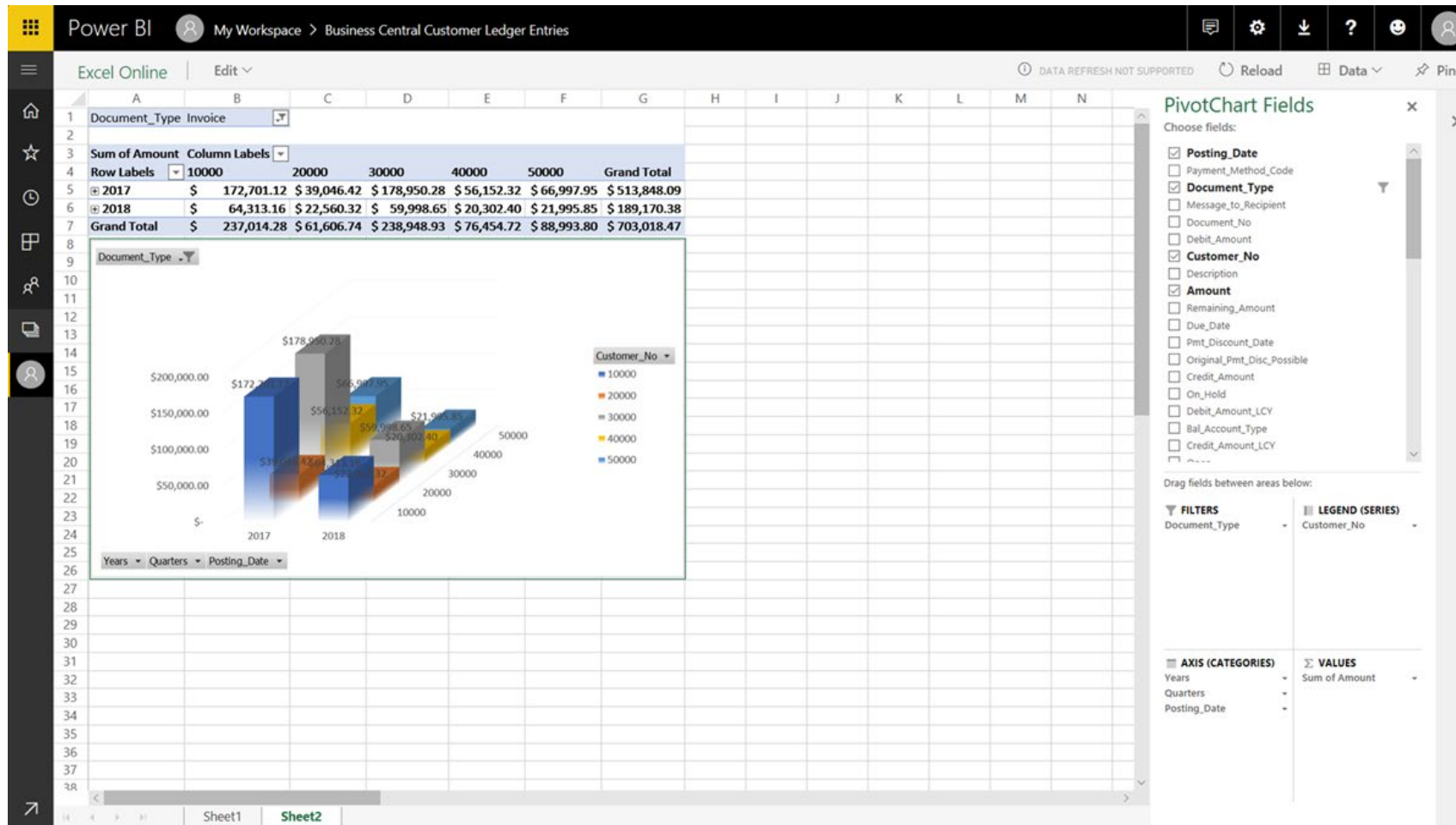
Subtotal Excl. Tax (USD): 8,360.20

Inv. Discount Amount (USD): 0.00

Items: 5 Unread: 2 Reminders: 46

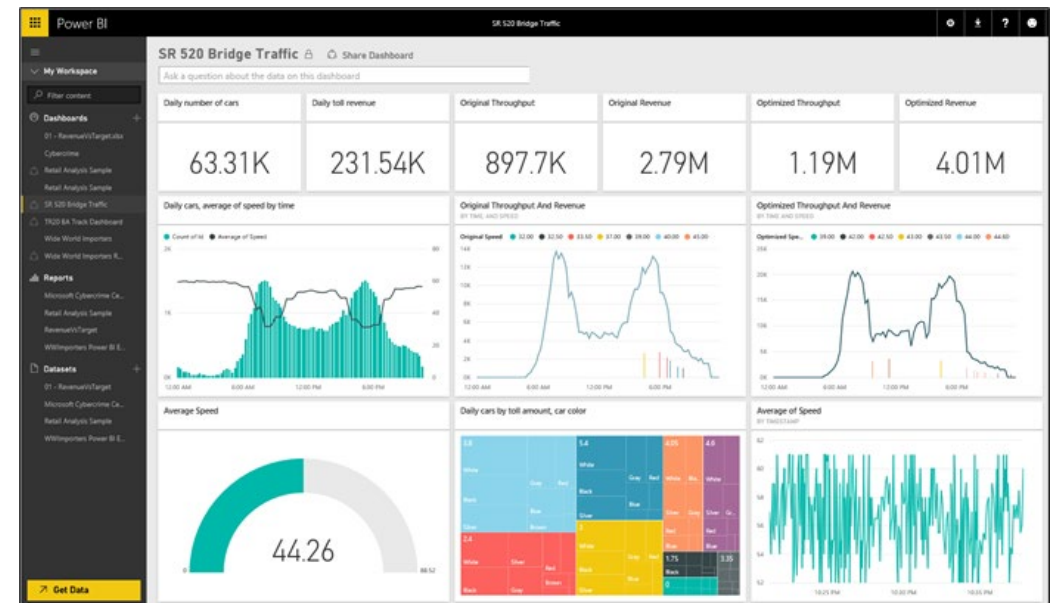
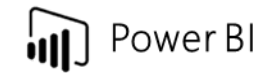
This folder is up to date. Connected to: Microsoft Exchange

Excel Integration



What is Microsoft Power BI?

- Experience your data. Any data, any way, anywhere.
- Power BI is a cloud-based business analytics service that enables:
 - Fast and easy access to data
 - A live 360° view of the business
 - Data discovery and exploration
 - Insights from any device
 - Collaboration across the organization
 - Anyone to visualize and analyze data



Microsoft Power BI Value Proposition

- Key benefits and differentiators



Pre-built content packs, consisting of dashboards and reports, for popular SaaS solutions



Real-time dashboard updates



Secure, live connection to your data sources, on-premises and in the cloud



Intuitive data exploration by using natural language query



Integration with familiar Microsoft products, and commitment for scale and availability in Azure

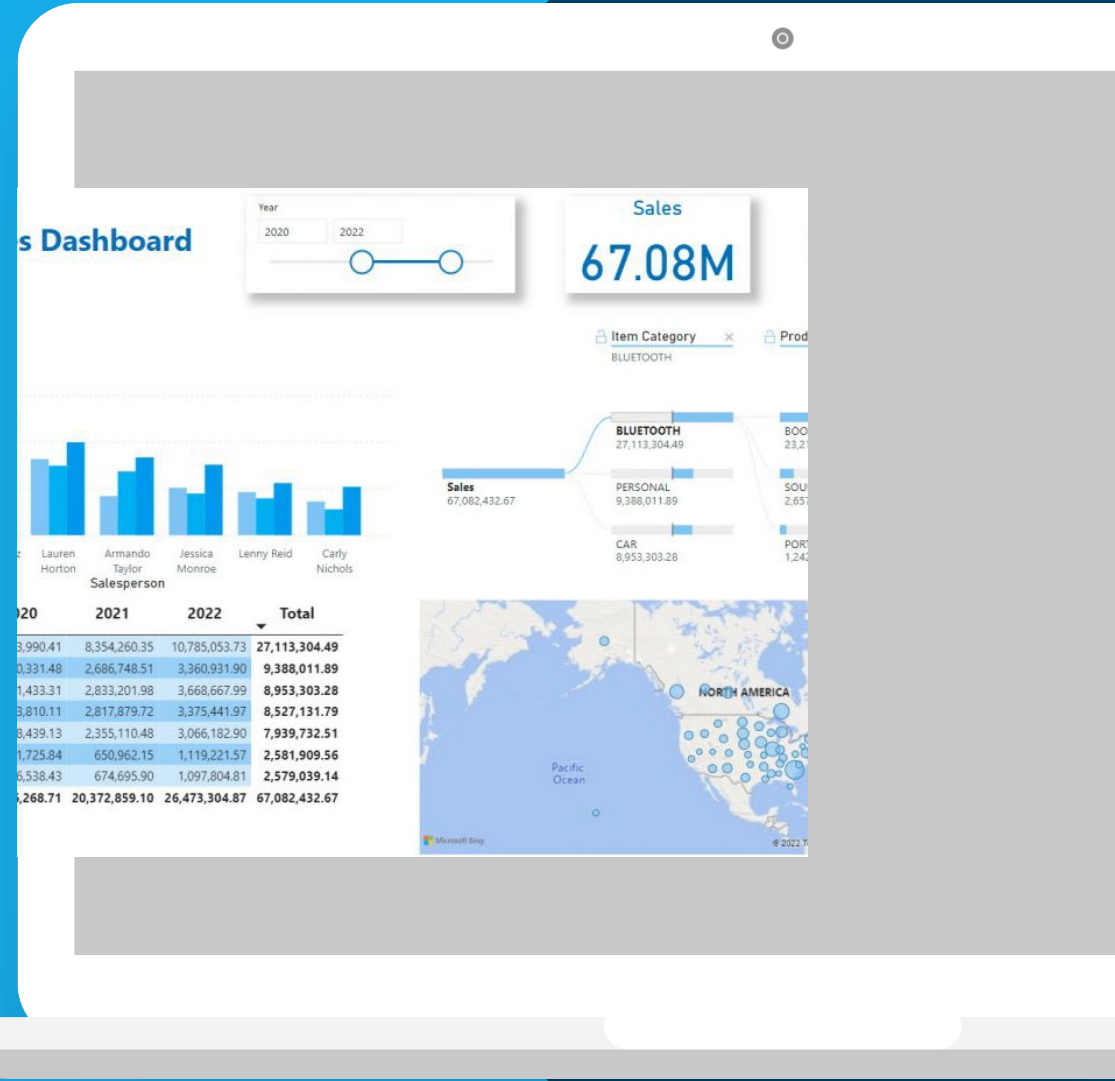


Fast deployment, hybrid configuration, secure, and integrated with existing IT systems



DASHBOARDS & ANALYTICS

- Power BI is now integrated with Cosmos!
- Leverage your Cosmos Data from within Power BI to quickly create robust dashboards
- Incorporate powerful charts, graphs, and more to paint a picture of your business performance
- Publish your Power BI dashboards to your Cosmos Portal with the push of a button
- Spot opportunities to increase revenue, reduce costs, and mitigate risk



COSMOS DATA ENGINE

- Manage your Business Central data in a modern, user-friendly interface
- Built for business users as opposed to technical users
- Powered by Microsoft's Azure Data Factory
- Easy to import and clean data with just a few clicks
- No coding required
- Comes with a prebuilt model for Business Central



Extensive Eco System

The screenshot displays the Microsoft AppSource website interface. At the top, there are browser tabs for 'KMnet Home Page - Home' and 'Microsoft AppSource - destinati...'. The address bar shows 'appsource.microsoft.com/en-us/'. The Microsoft logo and 'AppSource' branding are visible, along with a search bar and navigation icons. 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 navigation menu includes 'Categories', 'Industries', and 'Products', with 'Categories' selected. A grid of category buttons is shown, 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.



Automate your finances with BILL



AI invoice and PO intake

Capture and entry of key invoice and PO data for bill processing



Automatic workflow

Set-up in minutes, advanced approval rules for greater internal controls and visibility



Payment flexibility

Multiple options: ACH epayments, international wires, credit cards, virtual cards, checks



Collaboration

Integration and communication with vendors and customers



Secure payment processing

Bank integration, security, dual control, and fraud reduction



Integration

On-demand sync or easy import/export with accounting software to reconcile payments



Unlimited document storage & management

Capture and store all contracts, supporting data, and transactional documents



Mobile app

Manage AP on the go—take pictures of invoices, approve, pay, and more

Avalara

Microsoft Partnership Overview

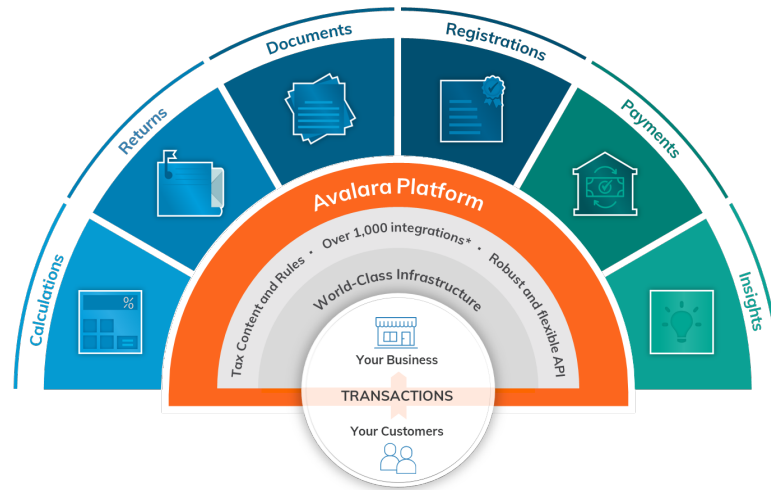
Currently Supported Dynamics Connectors

Microsoft Dynamics

- GP
- NAV
- CRM
- AX * EOL
- SL* Through Plumline

Microsoft Dynamics 365

- **Business Central**
- Finance
- Commerce
- Sales
- Field Service
- Project Operations

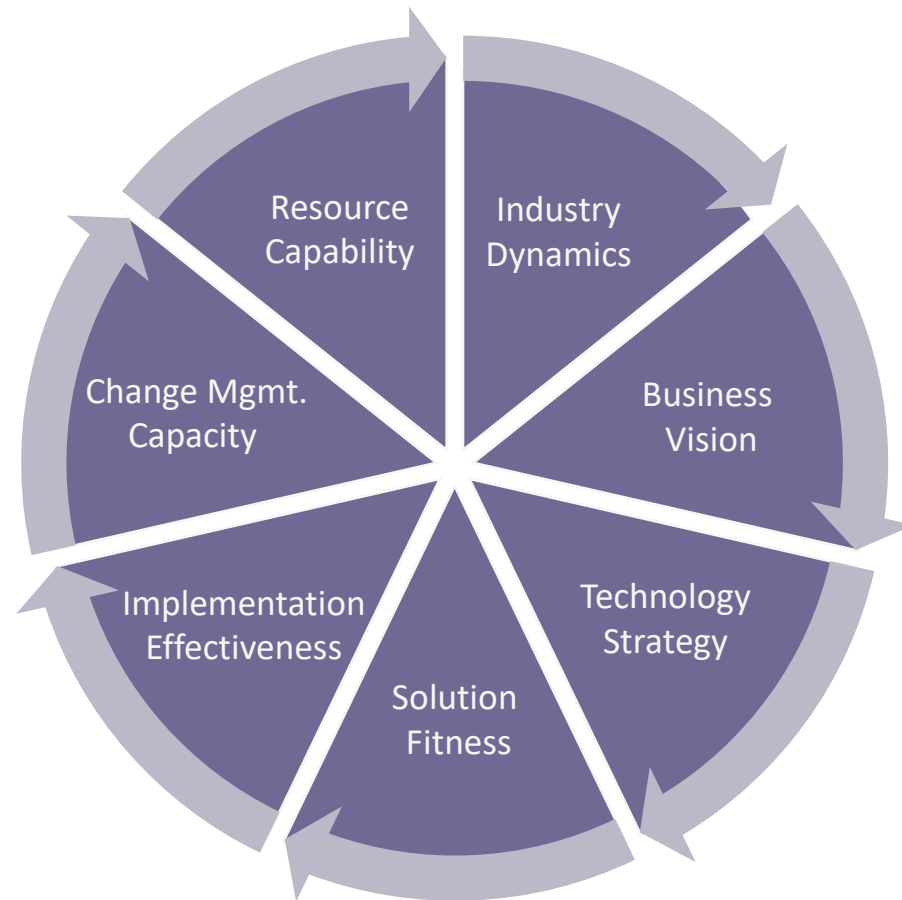


End-to-end sales tax automation

- ✓ Sales & Use Tax Calculations
- ✓ Customer & Vendor Exemption Management
- ✓ Returns
- ✓ Sales Tax Risk Assessments
- ✓ Tax Registrations & VDAs
- ✓ Tax Research
- ✓ Content Generation for POS
- ✓ Item Classification
- ✓ Cross Border
- ✓ VAT Registration, Reporting, & Calculation
- ✓ GST Calculations & Returns
- ✓ Global E-Invoicing & Fiscal Representation
- ✓ Business License & Permit Management
- ✓ Avalara for Hospitality, Communications, and BevAlc
- ✓ Excise Tax
- ✓ 1099 & W9
- ✓ Property Tax Management

*1,400+ signed partner integrations

Financial & ERP System Success Factors



Concluding Comments

- Pathway towards leveraging Microsoft's updated Financial/ERP systems to achieve digital transformation varies from one organization to another:
 - Simpler is better
 - Platform matters
 - Continuous innovation
 - Value based approach
 - Risk mitigation
 - Competitive advantage

Contact the Presenter



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Sassan is the Director-in-Charge of Kreischer Miller's Technology Solutions group. Sassan has worked with numerous organizations in the areas of planning for strategic IT initiatives, designing financial/ERP and business performance management solutions, and providing IT management, cyber, and information security advisory services. Sassan's consulting focus ensures clients select, design, deploy, and manage IT-enabled business technology solutions that are most suitable to satisfy their strategic objectives.

Kreischer Miller's technology professionals specialize in helping middle market organizations leverage the latest information management and protection solutions and practices in support of their strategic objectives.



Contact the Presenter



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J.T. is a Manager in Kreischer Miller's Technology Solutions group. J.T. has a proven track record in implementing financial systems for mid-market clients in a variety of industries, including e-commerce, manufacturing, distribution, and service organizations. He excels at navigating the latest technology offerings to create client solutions that are secure, cloud-first, cost effective, adaptable and easily supportable. His work allows clients maximize IT investments and focus on value-added activities.

Kreischer Miller's technology professionals specialize in helping middle market organizations leverage the latest information management and protection solutions and practices in support of their strategic objectives.





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