Microsoft ERP Promise Opportunities & Challenges

October 5, 2023

Sassan Hejazi, Director-in-Charge, Technology Solutions
J.T. Hardy, Manager, Technology Solutions

Kreischer Miller

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- Outdated and poorly integrated/enabled systems pose a significant obstacle towards the digital transformation journey!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.
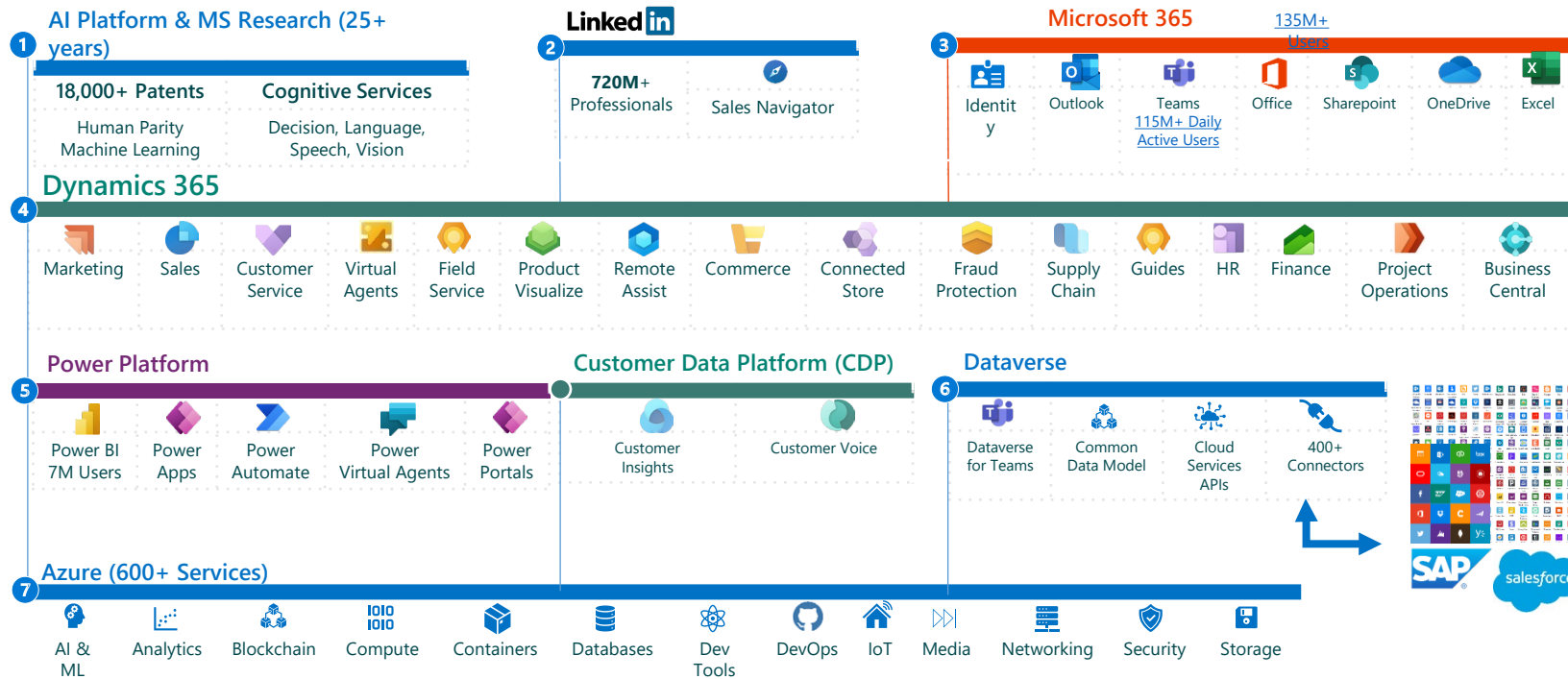
Going All in with the Cloud

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

① AI Platform & MS Research (25+ years)

18,000+ Patents | **Cognitive Services**

Human Parity Machine Learning | Decision, Language, Speech, Vision

② Linked in

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 | **Microsoft Security Response Center** | 7 Trillion cyber events daily = Threat Intelligence

Security | **Microsoft Trust Center** | Compliance | Transparency

nickfratello V.2020.02

Microsoft Cloud Platform

Dynamics BC Components

Financial management

Project management

Operations management

Reporting & analytics

Supply chain management

Sales & service management

MICROSOFT DYNAMICS 365
Business Central

Keeping You Updated!

Efficient User Interface

Outlook Integration

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 360º view of the business
  - Data discovery and exploration
  - Insights from any device
  - Collaboration across the organization
  - Anyone to visualize and analyze data
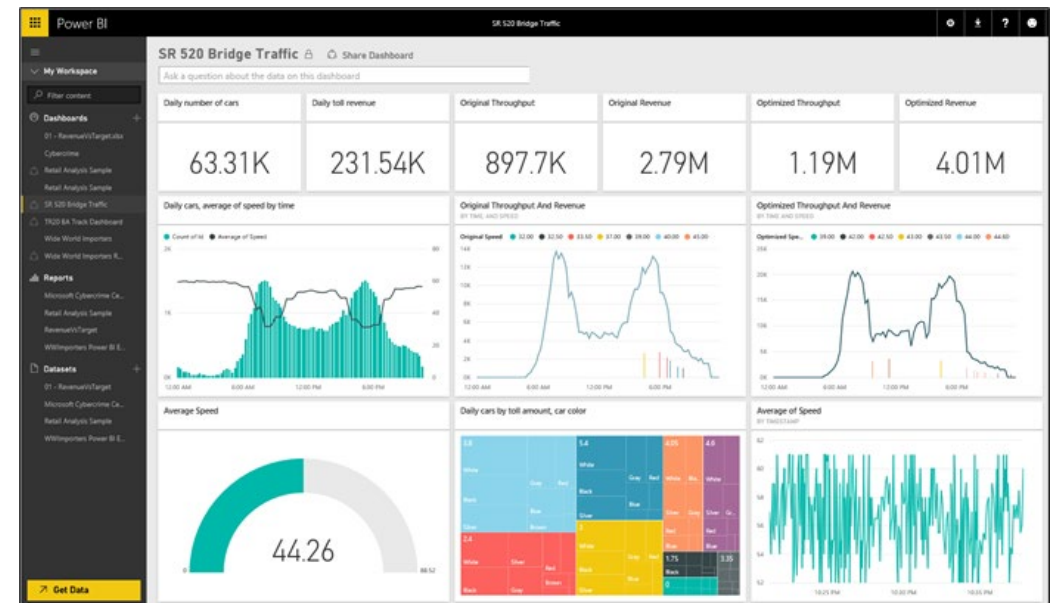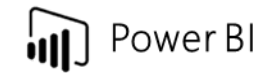
Microsoft Power BI Value Proposition

- 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
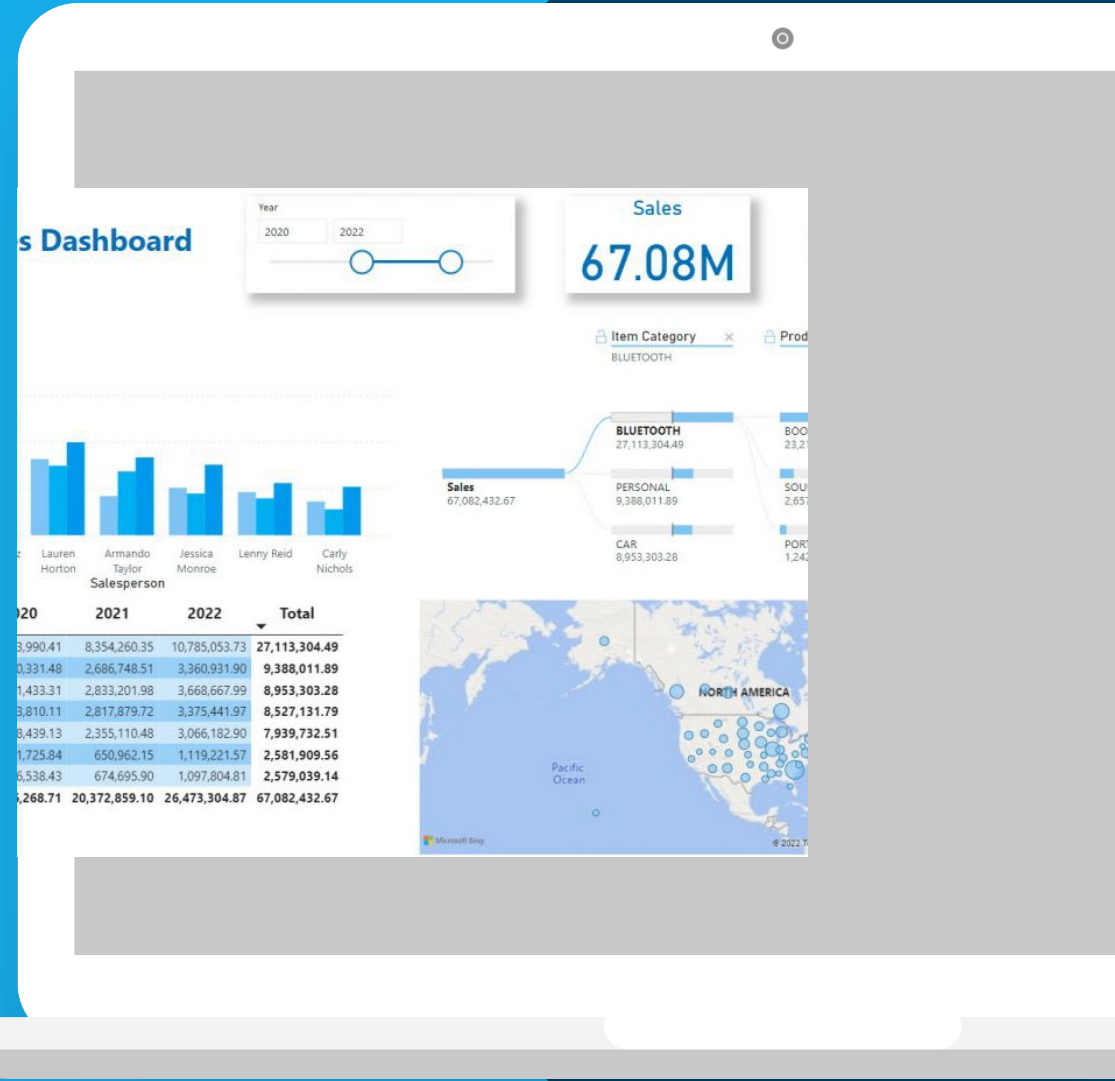
COSMO

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

COSMO

Extensive Eco System

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

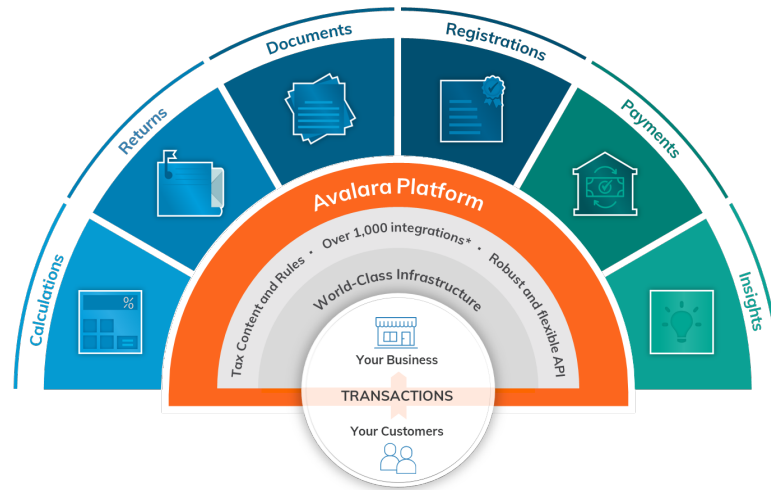## Microsoft Partnership Overview

Currently Supported Dynamics Connectors

Microsoft Dynamics

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

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
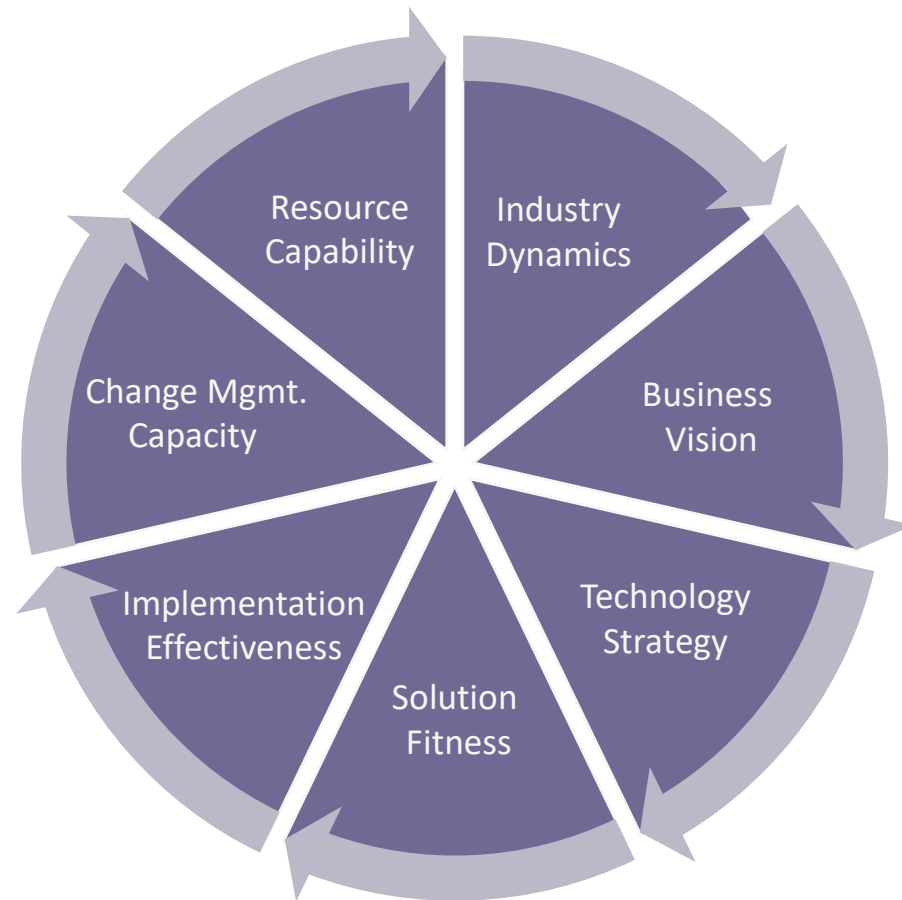
Concluding Comments

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

Contact the Presenter

Sassan S. Hejazi

DIRECTOR-IN-CHARGE, TECHNOLOGY SOLUTIONS

shejazi@kmco.com

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

J.T. Hardy

MANAGER, TECHNOLOGY SOLUTIONS

jhardy@kmco.com

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.

About
Kreischer Miller

Kreischer Miller is an advisory, audit and accounting, and tax firm serving the Greater Philadelphia and Lehigh Valley areas. We take an advisory approach in everything we do, working diligently to understand what your business needs to move ahead and providing the tools and guidance to help you get there.

Learn more at **www.kmco.com**

Kreischer Miller