

Gaining a Competitive Advantage with Microsoft Dynamics 365 Cloud



Sassan Hejazi
Pamela Altier

www.kmco.com

Kreischer
Miller

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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.
- Cloud based business systems enable the digital transformation journey.
 - Selecting the right tools and platforms assist management to reach the destination in a more expedited fashion.



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Strategic Drivers

- 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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Strategic Priorities

- 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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Microsoft Cloud for Strategic Enablement

- 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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Microsoft Cloud Platform



Going All in with the Cloud





Microsoft Business Application Solution Ecosystem

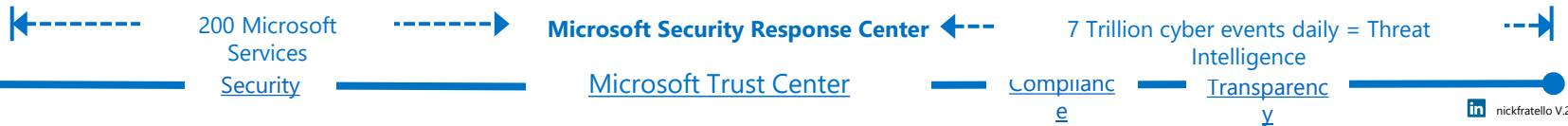
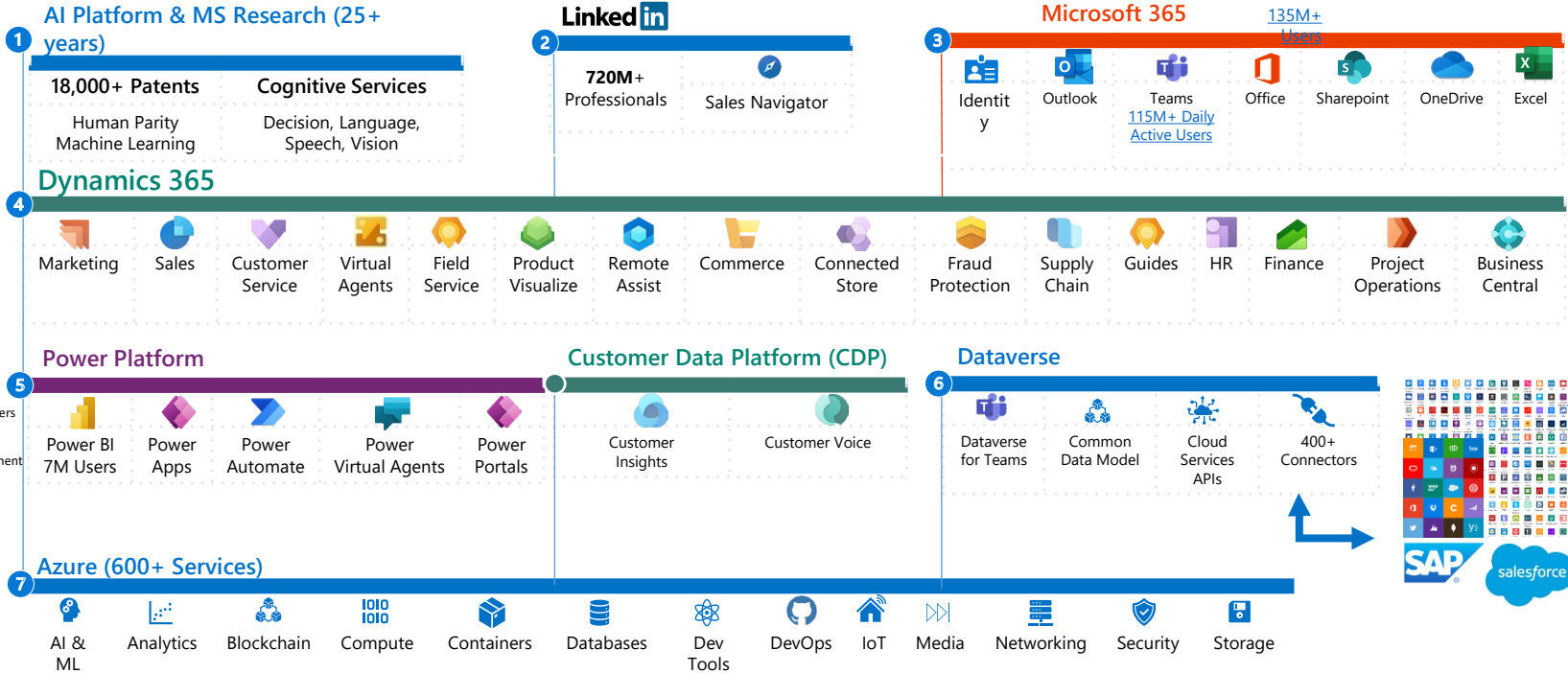
Microsoft's Business Applications are built on Azure, using a **Common Data Model** that unifies data in **Dataverse**. **Power Platform** is the low code extensibility solution for Microsoft's **Office 365**, **Teams**, **Dynamics 365** business applications (CRM & ERP) and integrates with **400+ services**.



64K+ Partners

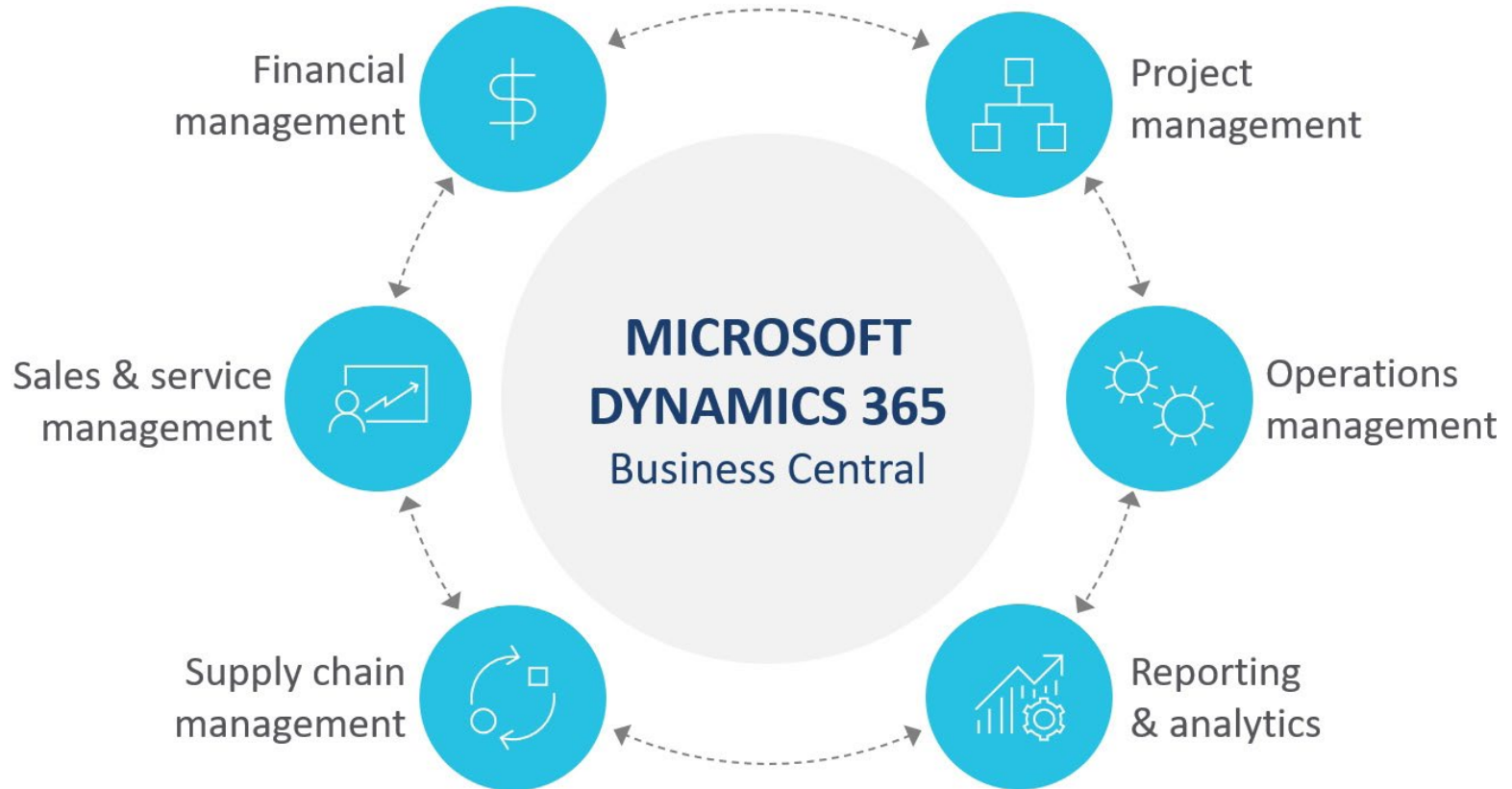
Analyst Recognition:

- 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



nickfratello V.2020.02

Dynamics BC Components



Keeping You Updated!

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
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ONGOING PURCHASES

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

UNPROCESSED PAYMENTS: 1	AVERAGE COL... DAYS: 5.8
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INCOMING DOCU...

OUTSTANDING... INVOICES: 10	MY INCOMING DOCUMENTS: 1
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Efficient User Interface



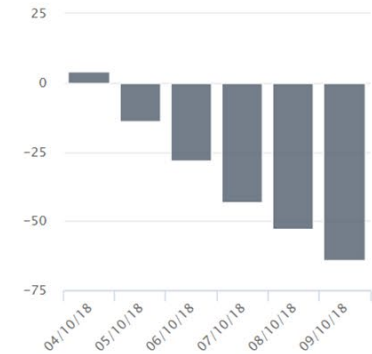
Dynamics 365 | Business Central | Items

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

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@contoso.com> 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	Locatc
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 100%

Excel Integration



Excel screenshot showing a financial statement with the following data:

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					
21	Purchase Returns & Allowances			Balance Sheet	Current Liabilities	Posting					
22	Deferred Revenue			Balance Sheet	Current Liabilities	Posting					
23	Credit Cards			Balance Sheet	Current Liabilities	Posting					
24	Sales Tax	-9,850.16	-9,850.16	Balance Sheet	Current Liabilities	Posting					
20200	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:

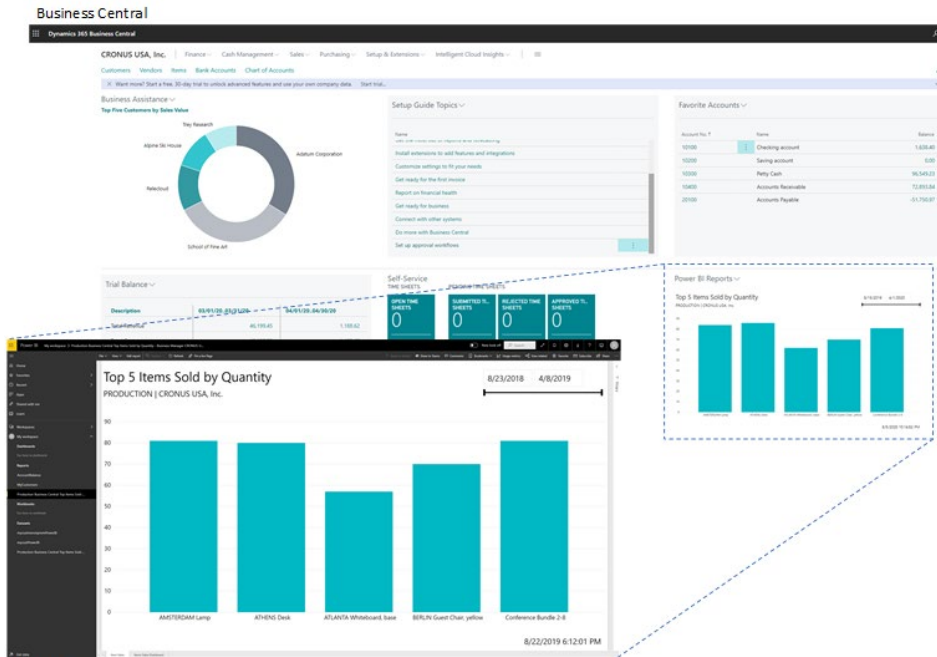
FILTERS
Document_Type

LEGEND (SERIES)
Customer_No

AXIS (CATEGORIES)
Years
Quarters
Posting_Date

VALUES
Sum of Amount

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 tools such as Jet Reports, Solver or PowerBI



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Microsoft Power BI



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 'appsourc.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.



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



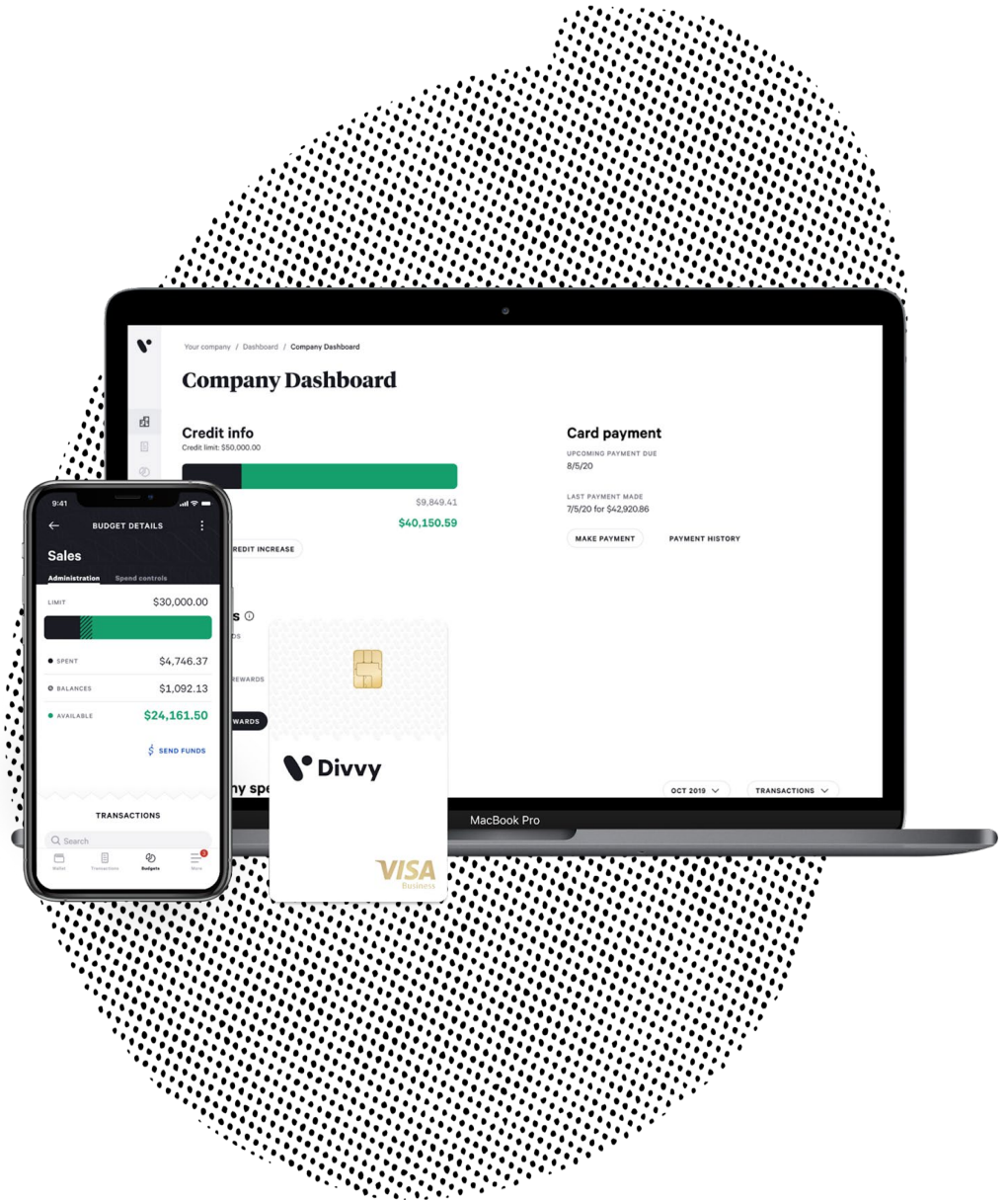
Mobile app

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



Divvy is BILL's expense management solution, ideal for small and medium businesses in any industry.

- Control spend
- Save time
- Get back to business



Business Central – Release Wave 1 – 2023

- Adjust exchange rates easily
- Use different general ledger accounts for payables and receivables
- Avoid document number errors when posting item journals
- Intercompany posting setup supports more transaction types
- Preview item journals before posting
- Review general ledger accounts faster
- Set up and sync master data across companies
- Ship and receive non-inventory items on warehouse documents
- Define content of created warehouse documents with filters
- Undo transfer shipments
- Company hub now lets admins add user-specific settings
- Shopify improvements
- <https://learn.microsoft.com/en-us/dynamics365/release-plan/2023wave1/smb/dynamics365-business-central/>



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Microsoft Dynamics BC – Industry Fitness

- Professional/Business Services
- Contracting & Field Services
- Manufacturing & Distribution
- Nonprofits & Social Services
- Accounting Departments – Integrated with Point Applications
- Holding Company/Private Equity Environments



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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 business systems helping you gain competitive advantage?



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Concluding Comments

- KM offers an exciting range of services to assist:
 - Accounting/Operations Diagnostic
 - Financial/ERP Systems Review/Selection
 - Microsoft Dynamics Implementation/Support
- Exciting opportunities to leverage Microsoft Cloud for Middle Market Digital Transformation!
- **Arrange a Complimentary Consultation Session to learn more.**



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Thank You for Attending!

Sassan S. Hejazi
Director-in-Charge, Technology Solutions
shejazi@kmco.com

Pamela Altier
Senior Financial/ERP Specialist, Technology Solutions
paltier@kmco.com



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