Dynamics GP Webcast Series

Cloud strategies for Dynamics GP Users

JAN. 28 – FEB. 13
MOVING TO THE CLOUD
For Microsoft Dynamics GP Customers

Considerations and Approach
The State of Microsoft Dynamics GP – GP Next

• Dynamics GP is **NOT** being retired by Microsoft
• Dropping the year designation moving forward (i.e. 2016, 2018, etc.)
• Yearly updates required to remain supported through Microsoft
• Continuing to release enhancements, not new functionality
• Partner solutions are still being supported
• Intelligent Cloud Insights is available for GP 2018
• Version 2015 is out of Mainstream support in April, 2020
# Dynamics GP Support Lifecycle

<table>
<thead>
<tr>
<th>Support Provided</th>
<th>Mainstream Support</th>
<th>Extended Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paid support (per incident, per hour, and other)</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Security Updates</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Non-Security Hotfix Support</td>
<td>X</td>
<td>Requires extended hot-fix support purchased within 90 days of Mainstream Support end date</td>
</tr>
<tr>
<td>No-charge Incident Support</td>
<td>X</td>
<td>None</td>
</tr>
<tr>
<td>Warranty Claims</td>
<td>X</td>
<td>None</td>
</tr>
<tr>
<td>Design Changes and Feature Requests</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Product Support from the Online MS Knowledge Base</td>
<td>X</td>
<td>None</td>
</tr>
<tr>
<td>Product Support from the Online MS Help and Support</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Dynamics GP 2018</th>
<th>10/13/2016</th>
<th>10/13/2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dynamics GP 2015</td>
<td>4/14/2020</td>
<td>4/9/2023</td>
</tr>
<tr>
<td>Dynamics GP 2015 R2</td>
<td>4/14/2020</td>
<td>4/9/2023</td>
</tr>
<tr>
<td>Dynamics GP 2016</td>
<td>7/13/2021</td>
<td>7/14/2026</td>
</tr>
<tr>
<td>Dynamics GP 2018 R2</td>
<td>7/13/2021</td>
<td>7/14/2026</td>
</tr>
<tr>
<td>Dynamics GP 2019</td>
<td>1/10/2023</td>
<td>1/11/2026</td>
</tr>
<tr>
<td>Dynamics GP 2019 R2</td>
<td>1/10/2023</td>
<td>1/11/2026</td>
</tr>
</tbody>
</table>
Considerations for your Company

• Is Dynamics GP meeting your current, immediate needs?
• How much are you spending yearly on maintaining the system?:
  - Enhancements
  - Environment
  - Upgrades/Updates
  - Third-party Maintenance
• Is accessibility (VPN or Client) hindering your team’s effectiveness and efficiency with the system?
• Is there already a designated investment to extend the solution functionality with products/integration (e.g. AP automation, expense management) or upgrade the system/environment?
• Does the team require updated system training?
YOUR OPTIONS

Moving to the Cloud
Upgrade Dynamics GP in a Private Cloud

<table>
<thead>
<tr>
<th>PROS</th>
<th>CONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Familiar System for Users</td>
<td>Additional IT Expenditure</td>
</tr>
<tr>
<td>Minimal Organizational Impact</td>
<td>Ongoing Update Costs</td>
</tr>
<tr>
<td>Full Access to SQL Database</td>
<td>Flat Roadmap</td>
</tr>
<tr>
<td>Maintain Data History</td>
<td>Need to Update ISVs and integrations</td>
</tr>
<tr>
<td>No Network Lag with VPN/RDP</td>
<td>Ongoing Enhancement Payments</td>
</tr>
</tbody>
</table>
# Migrate to a Cloud Solution

<table>
<thead>
<tr>
<th>PROS</th>
<th>CONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inherent Updates/Upgrades</td>
<td>Organizational Impact</td>
</tr>
<tr>
<td>Accessibility (PC/Tablet/Mobile)</td>
<td>Year 1 Cost Increase</td>
</tr>
<tr>
<td>Interoperability with other cloud apps</td>
<td>Re-training</td>
</tr>
<tr>
<td>Cloud capabilities (scale/scope)</td>
<td>Additional ISV investment</td>
</tr>
<tr>
<td>Lower long-term TCO</td>
<td>No SQL Database Access</td>
</tr>
</tbody>
</table>
Cloud Solutions for the Middle Market
# RSM ERP Comparison Matrix - Overview

<table>
<thead>
<tr>
<th>COMPANY</th>
<th>MICROSOFT</th>
<th>ORACLE</th>
<th>SAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Dynamics 365 for Finance and Operations</td>
<td>Dynamics 365 Business Central</td>
<td>NetSuite</td>
</tr>
<tr>
<td>Customer profile</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Typical revenue range</td>
<td>$200M+</td>
<td>$10M–500M</td>
<td>$10M-750M</td>
</tr>
<tr>
<td>International</td>
<td>M</td>
<td>G</td>
<td>M</td>
</tr>
<tr>
<td>Industry specialization</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manufacturing</td>
<td>M</td>
<td>M</td>
<td>G</td>
</tr>
<tr>
<td>Wholesale distribution</td>
<td>M</td>
<td>M</td>
<td>M</td>
</tr>
<tr>
<td>Food and beverage</td>
<td>M</td>
<td>M</td>
<td>G</td>
</tr>
<tr>
<td>Life sciences R&amp;D</td>
<td>M</td>
<td>M</td>
<td>M</td>
</tr>
<tr>
<td>Life sciences manufacturing</td>
<td>G</td>
<td>G</td>
<td>E</td>
</tr>
<tr>
<td>Retail</td>
<td>M</td>
<td>G</td>
<td>M</td>
</tr>
<tr>
<td>Field services</td>
<td>M with D365CE</td>
<td>M with D365CE</td>
<td>E + Third party</td>
</tr>
<tr>
<td>Media and publishing services</td>
<td>N/A</td>
<td>N/A</td>
<td>M</td>
</tr>
<tr>
<td>Professional services</td>
<td>M</td>
<td>M</td>
<td>M</td>
</tr>
<tr>
<td>Technology and software</td>
<td>M</td>
<td>E + Third party</td>
<td>M</td>
</tr>
<tr>
<td>Nonprofit</td>
<td>M</td>
<td>E + Third party</td>
<td>M</td>
</tr>
</tbody>
</table>

M – Mature ● G – Growth ● E – Emerging

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WORKING WITH RSM

Moving to the Cloud
RSM as your First Choice Advisor

As a leading provider of audit, tax and consulting services, RSM is well-positioned to bring the network of experience and resources to help overcome any unexpected challenges.

**Consulting**

The RSM Consulting practice provides an extensive range of capabilities and expertise, from infrastructure set-up to strategic planning. Whatever the challenge, RSM can provide the right experts to help determine the right solution.

**Our Consulting Services Include:**
- Application & infrastructure support
- Project management
- Systems integrations
- Business process improvements
- Business intelligence
- Systems selections
- Information security
- Supply chain optimization
- SOX compliance
- Internal control consulting
- IT strategy and optimization
- Lease due diligence
- Cost optimization
- People and organization optimization

**Tax**

RSM Tax services helps clients take a comprehensive perspective in a highly-dynamic and complex world of tax to deliver real savings. Our practitioners deliver value by creating a customized, integrated approach for each client to help achieve their specific objectives.

**Our Tax Services Include:**
- **Credits and Incentives**
  - Research and development
  - TIPS credits
  - WOTCs
  - EOTCs
- **Expenditure analysis**
  - Charitable
  - Package design costs
  - Meals and entertainment
  - Research and development
- **Leasing**
  - Anchor tenant benefits
  - Tenant allowances
  - Qualified leasehold improvements
  - Cost segregation
  - TARS
  - Bonus depreciation
  - Retail depreciation
  - State and local issues
  - Structuring/planning
  - Sales and use
  - Unclaimed property
  - Property tax
  - International
  - Transfer pricing
  - VAT/GST
  - Tax treaty /withholding comp.

**Audit**

The RSM Audit practice offers a full-scale line of services to help build, establish and verify trust in your financial reports. We have strict quality standards and deliver a full, fair and independent perspective throughout our services.

**Our Audit Services Include:**
- Asset valuation
- Complex debt and equity transactions
- Derivatives (hedging)
- Discounting and other promotional activities
- Exclusivity agreements/purchase commitments
- Gift card accounting and related breakage
- Incentive compensation arrangements
- Lease accounting
- Loyalty programs
- Self-insurance
## RSM Dynamics GP Capabilities

<table>
<thead>
<tr>
<th>CONSULTING SERVICES</th>
<th>PROJECT SERVICES</th>
<th>HOSTING and SECURITY</th>
<th>MANAGED SERVICES</th>
</tr>
</thead>
</table>
| • Optimization Assessment  
• Business Process Review  
• Back to Basics Training  
• Advanced User Training | • Local Certified Resources  
• Extensive Experience Levels  
• National Reach  
• Premier Microsoft US Partner  
• Industry Expertise  
• All Project Types  
  • Upgrades  
  • New modules  
  • Reporting | • Private SaaS/IaaS  
• Private Assure  
• Disaster Recovery  
• Backups  
• Security  
• Infrastructure Support | • Tiered Help Desk  
• Escalations to Experts and Microsoft  
• Break/Fix  
• Simple Enhancements  
• Support some Third Party Solutions  
• Unlimited offering available |
Building the Business Case for Dynamics GP Customers

- Discovery and System Review
- Estimation for GP Upgrade and/or hosting
- Business Case Presentation with Cloud Options
- Solution Demonstration
- Proposal with Quote
- Project Start

Rapid Assessment™ for Cloud Transformation
Rapid Assessment™ for Cloud Transformation

- Review current technology footprint, from business applications to infrastructure
- Document current and future business and operational processes to find areas for optimization or improvement
- Evaluate and validate the desired solution, based on factors such as company strategy and priorities, organizational impact, operational impact, overall costs and risk mitigation
- Calculate your Cloud TCO and ROI with the Value Calculator
Download the RSM Cloud ERP Selection Guide from RSMUS.com

- ERP Readiness Questionnaire
- Common Pitfalls
- Industry Trends in the Middle Market
- Cloud Solutions Comparison Matrix
- Selecting the Right Partners
- Evaluation Checklist
## Upcoming Webinar Series

<table>
<thead>
<tr>
<th>Date</th>
<th>Time (EST)</th>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>January 30&lt;sup&gt;th&lt;/sup&gt;</td>
<td>Noon</td>
<td>Cloud Options: <em>Sage Intacct</em></td>
</tr>
<tr>
<td>February 4&lt;sup&gt;th&lt;/sup&gt;</td>
<td>2 p.m.</td>
<td>Cloud Options: <em>Dynamics 365 Business Central</em></td>
</tr>
<tr>
<td>February 6&lt;sup&gt;th&lt;/sup&gt;</td>
<td>2 p.m.</td>
<td>Cloud Options: <em>NetSuite</em></td>
</tr>
<tr>
<td>February 11&lt;sup&gt;th&lt;/sup&gt;</td>
<td>2 p.m.</td>
<td>Cloud Options: <em>Dynamics 365 Finance &amp; Operations</em></td>
</tr>
<tr>
<td>February 13&lt;sup&gt;th&lt;/sup&gt;</td>
<td>2 p.m.</td>
<td>Extending your GP solution and hosting options</td>
</tr>
</tbody>
</table>
THANK YOU FOR YOUR TIME AND ATTENTION