MICROSOFT DYNAMICS GP CLOUD ERP OPTIONS – TAKING A LOOK AT DYNAMICS 365 BUSINESS CENTRAL
Agenda

• RSM – Who We Are
• RSM Dynamics 365 Business Central Practice Overview
• Dynamics 365 Business Central Overview, Highlights, & Differentiators
• Dynamics 365 Business Central Partnerships
• Dynamics 365 Business Central Focus
• Why Consider Dynamics 365 Business Central?
• Customer Story
RSM – WHO WE ARE
RSM overview

Fifth largest audit, tax and consulting firm in the U.S.
First Choice Advisor in the middle market

- Revenue over $2.4bn
- Offices in more than 87 cities
- 116 countries
- More than 41,000 people
- Founded 1926
- Nearly 11,000 employees

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Leading provider of technology, risk, financial, transaction and business consulting services - incorporating deep industry expertise - to middle market leaders

$597M in revenue in FY19

194 partners/principals

2,300+ clients

600+ private equity and portfolio clients

More than 3,000 consulting professionals

More than 6 years in a row Consulting Magazine Best Firms to Work For recipient

One of the largest Microsoft Gold Partners in the U.S.

More than 16% compound annual growth rate (CAGR) over the past five years

46 languages are spoken by RSM Consulting professionals

Member of the Institute of Internal Auditors Principal Partner Program

#1 NetSuite consulting partner in the U.S.
An Experienced Microsoft Partner

• For more than 25 years, our consultants have helped over 2,000 clients implement Microsoft-based business management solutions
• 400+ U.S. based consultants in Microsoft Dynamics
• Dedicated Managed IT Services practice
• We represent the full range of Microsoft Dynamics Products
  o Dynamics 365 Finance and Operations (AX)
  o Dynamics 365 Business Central (NAV)
  o Dynamics 365 Customer Engagement
  o Dynamics GP
  o Dynamics SL
• Microsoft Awards and Recognition
  o National and Regional Partner of the Year
  o Inner Circle and President’s Club for over 15 Years
  o Pinnacle Award Winner
  o Customer Innovation Award Winner
  o Member Partner Advisory Council
Dynamics 365 Business Central Practice

- Servicing over 100 clients on the solution
- 35 functional resources plus 5 onshore/offshore app dev
DYNAMICS 365 BUSINESS CENTRAL OVERVIEW, HIGHLIGHTS, & DIFFERENTIATORS
Digital Transformation

CRM

ERP
Digital Transformation

CRM

- Marketing
- Connected Store
- Human Resources
- Project Service Automation
- Field Service

Microsoft Dynamics 365

ERP

- Sales
- Customer Service
- Business Central
- Finance & Operations
- Commerce
The Advantages of Microsoft Dynamics 365

Practical
Start with only the apps you need and grow at your own pace

Economical
User-based pricing with full solution functionality

Adaptable
Grow, evolve and transform with modern, extensible platform

Connected
Familiar tools that work in unison for your business
Microsoft Dynamics 365
Business Central
Microsoft’s Largest Business Application Customer Base: Over 140,000 Customers Worldwide
## Solution Capabilities

<table>
<thead>
<tr>
<th>ESSENTIALS</th>
<th>PREMIUM</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Financials</strong></td>
<td>End-to-End Accounting</td>
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<tr>
<td><strong>Sales Management</strong></td>
<td>Quote Generation</td>
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<tr>
<td><strong>Purchasing</strong></td>
<td>Procurement</td>
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<tr>
<td><strong>Inventory Management</strong></td>
<td>Forecasting</td>
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<tr>
<td><strong>Project Management</strong></td>
<td>Capacity Planning</td>
</tr>
<tr>
<td><strong>Production</strong></td>
<td>BOMs and Routing</td>
</tr>
<tr>
<td><strong>Service Management</strong></td>
<td>Service Orders</td>
</tr>
</tbody>
</table>
Quote to cash, all within Outlook

Create quotes, process orders, and submit invoices without leaving Outlook
Extend with Microsoft Word and Adobe Acrobat PDF

Create professional looking, customizable quotes and invoices in Word and Adobe PDF
Work in Microsoft Excel

Access live Dynamics 365 data, directly from Microsoft Excel, to read, write, and update items, sales orders, and purchase orders
Automate and secure business processes

Streamline business processes with easy-to-create workflows. Track cash flow and secure purchasing, credit authorization, and vendor payment processes.

Ensure compliance with audit trails and enterprise-level security.
Add industry specific apps with ease

Extend Dynamics 365 to fit industry or business needs with integrated add-on apps

Connect to data sources and services — Excel files, SharePoint lists and Dynamics Sales records with Microsoft PowerApps
Gain deeper insights with advanced analytics

Perform ad hoc, customized reporting by analyzing data across multiple dimensions

Create custom dashboards for real-time analysis using Microsoft Power BI
Work where your business takes you

Desktop, laptop, tablet, or phone; you get the same powerful capabilities and rich functionality.

Get one experience that’s consistent and secure across Windows, iOS, and Android.
Poll Question #1

Have you already learned something new about Dynamics 365 Business Central to this point in today’s webcast?

YES
NO
DYNAMICS 365
BUSINESS CENTRAL
PARTNERSHIPS
Current Partner Solutions

INDUSTRY

EXTENSIONS

POINT

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Think of Tangicloud as an extension of Microsoft Business Central to deliver additional–industry-specific–functionality typically not found in great commercial ERP products. Business Central delivers a richness of functionality for handling multiple companies, currencies, general ledger, payables, receivables, inventory, etc. Then Tangicloud extends this solution to add fully integrated, industry-specific functionality like:

- Advanced Allocations
- Fund Accounting
- Contacts with Donation Management
- Grant Management
- Budget Control
Multi-Entity Management - Binary Stream

Consolidate and track all your legal entities in order to streamline intercompany transactions, control security access and improve workplace efficiency. Multi-Entity Management (MEM) for Microsoft Dynamics 365 Business Central centralizes the processing of purchase orders, receipts, payroll, invoices, and more. The automation of these various tasks reduce the potential for human error and maintains data integrity. As a result, MEM allows you to reposition your resources for a better return on your ERP investments and helps you make informed business decisions.

Features and Benefits

- Consolidate your multiple legal entities into a single instance to maintain consistent customer, vendor, item, and fixed asset master data for easy sharing.
- Provides greater visibility into corporate performance by allowing consolidated real-time reporting for all business entities.
- Add a flexible user-entity security layer fully integrated into Microsoft Dynamics 365 Business Central.
- Create audit-friendly, up-to-date financial reporting for a smoother period-end experience.
Envestnet Yodlee Bank Feeds offers the ability to link to online bank accounts to import electronic bank statements for use in payment reconciliation.

The Envestnet Yodlee Bank Feeds extension provides the following benefits:

- Removes the need for manual entry
- Improves efficiency and accuracy when doing payment reconciliation
- Supports a large number of banks
- Allows up-to-date information about bank transactions from within Dynamics 365 Business Central
- Supports manual as well as automatic bank feeds
- Enables outsourcing of payment reconciliation to an accountant by providing access to bank statements.
DYNAMICS 365
BUSINESS CENTRAL
FOCUS
Core Accounting

- Microsoft’s ERP cloud solution from small business to middle market enterprises
- Supports compliance for both GDPR and SOX
- Utilizes dimensional accounting for chart of accounts for easy management and reporting
- "All-in-one" priced solution for financials, project accounting, fixed assets and purchasing
- Migration tools available for most accounting solutions
Complex ERP

• Microsoft’s ERP cloud solution for small and mid-market distributors and manufacturers (discrete, jobs, blending)

• Integrated solution based on Microsoft platform for full supply chain management - including office productivity, mobile sales and service, warehouse management, eCommerce, and EDI.

• Designed for global companies with multiple locations and business units
Industries

- Wholesale Distribution
  - Consumer Package Goods
  - Industrial Products

- Discrete Manufacturing
  - Industrial Products
  - Job Shop
  - Metal Fabrication

- Consumer Products
  - Quality
  - Lot trace
RSM Industry Solution – Food & Beverage

- Commodity Contract Management for Grower (CCM)
- Expanded Inventory Trace (IT)
- Freshness Rules
- Trade Promotions Management (TPM)
- Quality Management
- Dock Management
- Clear Thru
- Vendor Certification
- Sales Proration
Poll Question #2

Which term best describes your current Dynamics GP solution footprint?

CORE Accounting
COMPLEX ERP
NEITHER or UNSURE
WHY CONSIDER DYNAMICS 365 BUSINESS CENTRAL?
GP: Migrate to Business Central Cloud

On-premises

GP 2015

GP 2016

GP 2018

GP

Cloud

Migration Tool

February 2020

GP 2018 R2 or higher

Microsoft Dynamics 365
Business Central

Financial management

Operations management

Project management

Sales & service management

Supply chain management

Reporting & analytics

Update

Update

Update
### GP Migration Enhancements – Wave 1 2020

<table>
<thead>
<tr>
<th>FEBRUARY 2020</th>
<th>MARCH 2020</th>
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<th>MAY 2020</th>
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<td><strong>GP to BC Migration</strong></td>
<td><strong>GP to BC Migration</strong></td>
<td><strong>GP to BC Migration</strong></td>
<td><strong>SmartList Designer</strong></td>
<td><strong>GP to BC Migration</strong></td>
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<tr>
<td>- Migrate GP Chart of Accounts to BC Dimensions</td>
<td>- Inventory Enhancements</td>
<td>- ISV Migrations</td>
<td>- Public Preview</td>
<td>- Bank Rec (Checkbooks, Outstanding Transactions)</td>
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<td>- Customer Enhancements</td>
<td>- Locations</td>
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<tr>
<td>- Active/Inactive Customers</td>
<td>- Quantity on Hand-Locations</td>
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<tr>
<td>- Ship to Addresses</td>
<td>- Serial Numbers</td>
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<td>- Vendor Enhancements</td>
<td>- Lot Numbers</td>
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<td>- Active/Inactive Vendors</td>
<td>- ISV Migrations</td>
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<td>- Order Addresses</td>
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<tr>
<td>- One-step migration from GP 2015 or newer versions</td>
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</table>

**NOTE:** Roadmap is subject to change during the course of development cycles.
Why Migrate to Business Central? The tenants of the Business Case

- Cloud Strategy – taking advantage of other Microsoft Cloud apps and tools (CRM, Talent, PowerBI, etc.) when moving to Business Central
- Interoperability – the importance of having your accounting system work in unison with employee productivity tools from Office, including Outlook, Excel, SharePoint and Power BI
- Extensibility – most current Dynamics GP partner solutions have a Business Central offering, if necessary
- Functionality – same or similar functionality as Dynamics GP
- Value – discounted licensing for current Dynamics GP customers
### Dimensions from Segments

<table>
<thead>
<tr>
<th>No.</th>
<th>Name</th>
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<th>Values</th>
<th>Combinations</th>
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<td>Accrued WIP Costs</td>
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<td>10150</td>
<td>TOTAL ASSETS</td>
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<td>LIABILITIES</td>
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<td>Purchase Discounts</td>
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</tbody>
</table>
Saved Views aka Smartlists

Filter View

Multi-Filter

SmartList
Account Schedules from Management Reporter

Schedules/Reports

Build

Report
Product Quotes from Basic Requisitions
Pricing for Dynamics Customers

Business Central
*Essentials*
$70 - $42
Per user/month

Business Central
*Premium*
$100 - $60
Per user/month

- Must be current on Dynamics GP Enhancement
- Team Members: $5 per user/month
- Premium includes Production and Service Management
## 5-Year Total Cost of Ownership (Example)

<table>
<thead>
<tr>
<th></th>
<th>Dynamics GP</th>
<th>Dynamics 365</th>
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</thead>
<tbody>
<tr>
<td>Licensing</td>
<td>$4,500</td>
<td>$2,016*</td>
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<tr>
<td>Upgrade Services</td>
<td>$12,000</td>
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<tr>
<td>Hosting Services</td>
<td>$15,000</td>
<td>-</td>
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<tr>
<td>Migration Services</td>
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<td>$40,000</td>
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<tr>
<td><strong>Year 1</strong></td>
<td>$31,500</td>
<td>$42,016</td>
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<tr>
<td><strong>Year 2</strong></td>
<td>$19,500</td>
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<tr>
<td><strong>Year 3</strong></td>
<td>$19,500</td>
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<tr>
<td><strong>Year 4</strong></td>
<td>$19,500</td>
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<tr>
<td><strong>Year 5</strong></td>
<td>$31,500**</td>
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<tr>
<td><strong>Total</strong></td>
<td>$121,500</td>
<td>$50,080</td>
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</tbody>
</table>

* - assumes 4 named users of Essentials  
** - Upgrade of GP in Year 5
Poll Question #1

Given what you have learned and understood about Dynamics 365 Business Central today, would you recommend that your company should consider Business Central as an option for your future accounting/ERP application?

YES
NO
NEED MORE INFORMATION
CUSTOMER STORY
Boys & Girls Club

• Situation: Current Office 365 / Managed IT customer who needed an upgrade to Dynamics GP
• Approach: Utilized dimensions to meet grant accounting needs
• Conversation: Focused on TCO with added value of other Dynamics 365 apps
• Results:
  - D365 Business Central
  - Power BI
  - D365 Sales for Volunteer/Donation Management (future)
THANK YOU FOR YOUR TIME AND ATTENTION