PRESENTATION AND DEMONSTRATION OF MICROSOFT DYNAMICS 365 BUSINESS CENTRAL
Bios

Spencer Coulter
Manager
Des Moines, IA
Technology Management Consulting

7 Years experience with Business Applications
• Microsoft Dynamics Suite
  • Dynamics NAV
  • Dynamics 365 BC
  • Dynamics AX
  • Dynamics GP
  • Dynamics CRM
• Application Development
  • Dynamics Products
  • Integration
  • Ground Up

Mike Persichini
Director
Dallas, TX
Technology Management Consulting

16 Years experience with Business Applications
• Microsoft Dynamics Suite
  • Dynamics NAV
  • Dynamics 365 BC
  • Dynamics GP
  • Dynamics CRM
• Application Development
  • Dynamics Products
About RSM

Fifth largest audit, tax and consulting firm in the U.S.

- Over $1.8 billion in revenue
- 90 cities and more than 9,000 employees in the United States
- Internationally*
  - Presence in more than 120 countries
  - More than 41,000 people in over 740 offices
  - $4.7 billion (U.S.) in worldwide revenues

* RSM US LLP is a limited liability partnership and the U.S. member firm of RSM International, a global network of independent audit, tax and consulting firms. The member firms of RSM International collaborate to provide services to global clients, but are separate and distinct legal entities that cannot obligate each other. Each member firm is responsible only for its own acts and omissions, and not those of any other party. Visit rsmus.com/aboutus for more information regarding RSM US LLP and RSM International.
We offer a comprehensive scope of technology services, covering IT strategy, application and systems integration, infrastructure and outsourcing.
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

© 2018 RSM US LLP. All Rights Reserved.
MICROSOFT CLOUD TRANSFORMATION
DYNAMICS 365
Digital Transformation

CRM

ERP
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 Ecosystem
Dynamics 365
Business Central

- Basic Financials with Projects
- Moderately Configurable
- Standard Logistics/WMS
- Discrete/Assembly Mfg.
- Service Management
RSM AND THE MICROSOFT CLOUD
INNOVATE 365
RSM TMC and the Microsoft Cloud

Microsoft Dynamics 365

Microsoft AppSource

Employee Productivity Suite

- Office 365
- Word
- Excel
- PowerPoint
- Outlook
- OneNote
- Access
- Project
- Publisher
- Visio
- Skype
- Teams
- SharePoint

Intelligence Suite

- Power BI
- Cortana Intelligence
- Azure IoT
- Customer Insights

Common application platform: PowerApps, Microsoft Flow, Common Data Model, Azure
RSM TMC and the Microsoft Cloud

Innovate 365

Employee Productivity Suite

Management Consulting
Plan, implement, optimize

Microsoft Dynamics 365
Migration
Security

Intelligence Suite

Managed Services and Support
Outsourcing, co-sourcing

Common application platform: PowerApps, Microsoft Flow, Common Data Model, Azure
Microsoft Cloud solution sets and services created to maximize your IT investment, built by RSM
Innovate 365 Sample Solution Sets

**Professional Services**
- Business Central
- Sales
- Project Service
- Revenue Recognition
- Talent
- Resource Forecasting
- Revenue Recognition
- Shipping Integration
- Serialization

**Distribution/Mfg.**
- Business Central
- Sales
- Customer Service
- Field Service
- Shipping Integration
- Serialization

**Healthcare**
- Business Central
- Sales
- Customer Service
- Talent
- CTI
- HIPAA Security
Innovate 365 for Your Company

• Discuss your corporate cloud strategy and related alignment with our team

• Review current technology footprint, from business applications to infrastructure

• Consider the appropriate Microsoft Cloud apps and tools that make sense for your business

• Discuss various paths for acceptance and implementation based on factors such as company strategy and priorities, organizational impact, operational impact, overall costs and risk mitigation

• Engage in a Rapid Assessment for Innovate 365 Cloud Transformation
Microsoft Dynamics 365 Business Central
Solution Origin

Microsoft Dynamics NAV

Microsoft Dynamics 365 Business Central
## Solution Capabilities

<table>
<thead>
<tr>
<th>Financials</th>
<th>Accounts receivables/payables</th>
<th>Bank reconciliation</th>
<th>Fixed asset management</th>
<th>Month/Year end closing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales</td>
<td>Quote generation</td>
<td>Contact management</td>
<td>Sales invoicing</td>
<td>Payment processing</td>
</tr>
<tr>
<td>Purchasing</td>
<td>Procurement</td>
<td>Purchase line discounting</td>
<td>Purchase order management</td>
<td>Vendor management</td>
</tr>
<tr>
<td>Inventory Management</td>
<td>Forecasting</td>
<td>Inventory control</td>
<td>Shipment and distribution</td>
<td>Returns and cancellations</td>
</tr>
<tr>
<td>Project Management</td>
<td>Capacity planning</td>
<td>Budgets and estimates</td>
<td>Job and process costing</td>
<td>Resource management</td>
</tr>
<tr>
<td>Production</td>
<td>BOMs and Routing</td>
<td>Production orders</td>
<td>Master planning</td>
<td>Shop floor controls</td>
</tr>
<tr>
<td>Reporting and Analytics</td>
<td>Customer insights</td>
<td>Self-serve reports</td>
<td>Interactive dashboards</td>
<td>Built-in intelligence</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.
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
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
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
Pricing

Business Central Essentials Full User $70 USD Per user/month

Business Central Premium Full User $100 USD Per user/month

Business Central Essentials Team Member $8 USD Per user/month
High-Level Implementation Methodology

The proven methodology below is a joint venture between RSM and our clients. Each team will have specific responsibilities for each shared milestone. Gateway milestones are highlighted below:

Project Management, Communication & Change Enablement

Prior to Project Start
- Kickoff Meeting
- PMO Project Plan Review
- Hosting & Software Installation
- Data Extraction/Cleansing
- Critical Report Inventory
- Identify Available Resources

Solution Verification
- Requirements Workshop
- Core Team Training
- Solution Design Document
- Project Alignment & Re-Evaluation
- Review/Approval Solution Document

Implementation
- Configuration Workshops & Detail Design
- Data Migration
- Custom Development
- User Process Documentation
- Test Script Creation
- Unit Testing
- System Admin

Deployment
- System Review
- System Testing
- End-User Training
- PMO Quality Assessment
- Mock Go Live
- System Deployment

Go-Live & Support
- PMO Quality Review
- Go-Live
- On-Site Support
- Support Transition

Risk & Issues Management

Note: More granular detail will be provided during the PMO Project Plan Review milestone
DEMONSTRATION
QUESTIONS AND ANSWERS?
This document contains general information, may be based on authorities that are subject to change, and is not a substitute for professional advice or services. This document does not constitute audit, tax, consulting, business, financial, investment, legal or other professional advice, and you should consult a qualified professional advisor before taking any action based on the information herein. RSM US LLP, its affiliates and related entities are not responsible for any loss resulting from or relating to reliance on this document by any person. Internal Revenue Service rules require us to inform you that this communication may be deemed a solicitation to provide tax services. This communication is being sent to individuals who have subscribed to receive it or who we believe would have an interest in the topics discussed.

RSM US LLP is a limited liability partnership and the U.S. member firm of RSM International, a global network of independent audit, tax and consulting firms. The member firms of RSM International collaborate to provide services to global clients, but are separate and distinct legal entities that cannot obligate each other. Each member firm is responsible only for its own acts and omissions, and not those of any other party. Visit rsmus.com/aboutus for more information regarding RSM US LLP and RSM International.

RSM® and the RSM logo are registered trademarks of RSM International Association. The power of being understood® is a registered trademark of RSM US LLP.

© 2018 RSM US LLP. All Rights Reserved.