

## MICROSOFT DYNAMICS GP CLOUD ERP OPTIONS – TAKING A LOOK AT MICROSOFT DYNAMICS 365 FOR FINANCE AND OPERATIONS

THE POWER OF BEING UNDERSTOOD  
AUDIT | TAX | CONSULTING



# Your Speakers



## Mike Gillis

### Principal, Technology Consulting

Providing Industry Focused Business Applications for 35 years

Microsoft Business Applications Partner since 2004

Highly engaged Microsoft Partner participating in multiple Microsoft Partner Advisory Councils and many client, company, and individual awards for service as a Microsoft Partner.



## Mike Masschelin

### Solution Architect

Nearly 14 years of Microsoft Dynamics 365 F&O / Dynamics AX / Axapta experience

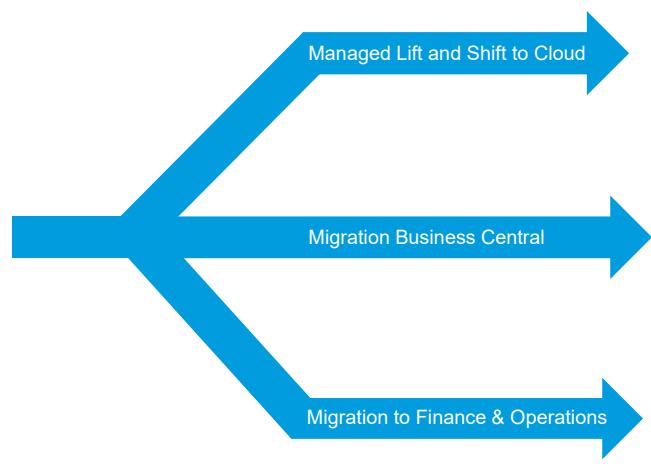
Dynamics 365 Partner since 2006

Technology focused professional serving the middle market in manufacturing, retail and life sciences industries.

## Agenda – Taking Dynamics at 365 F&O

- Introduction
- RSM – Who We Are
- Practice Overview
- Overview, Highlights, & Differentiators
- Partnerships
- Industry Focus
- Use GP Today? Why Consider Dynamics 365 F&O?
- Customer Story

## 1. Microsoft and RSM have Excellent Alternatives for GP Customers



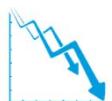
Native Cloud App	Business Disruption	Cost	Security	Existing Functionality	Extended Functionality	Extended Toolset	Number of ISVs Required
○	●	●	○	●	○	○	○ Lot of ISVs Already Have
●	○	○	●	○	●	●	○
●	○	○	○	○	●	●	○

## 2. Perfect Storm of Factors Created SaaS Industry

*Customers win the battle for the burden of proof*

### CONSUMPTION ECONOMICS

Renting Apps instead of buying them (SaaS)



#### Global Financial Crisis

There was no money for capital spending



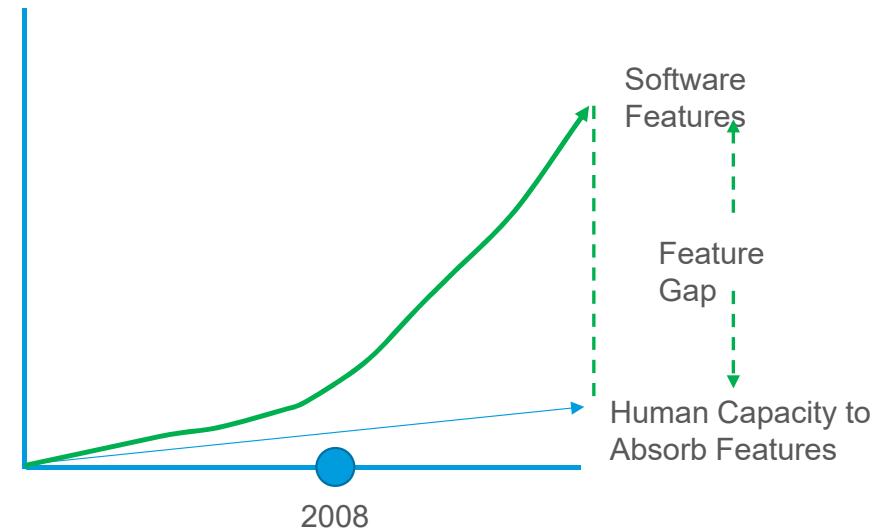
#### Cloud Computing Got Real

Limitations on bandwidth and capacity reduced



#### iPhone

There is an App for that.



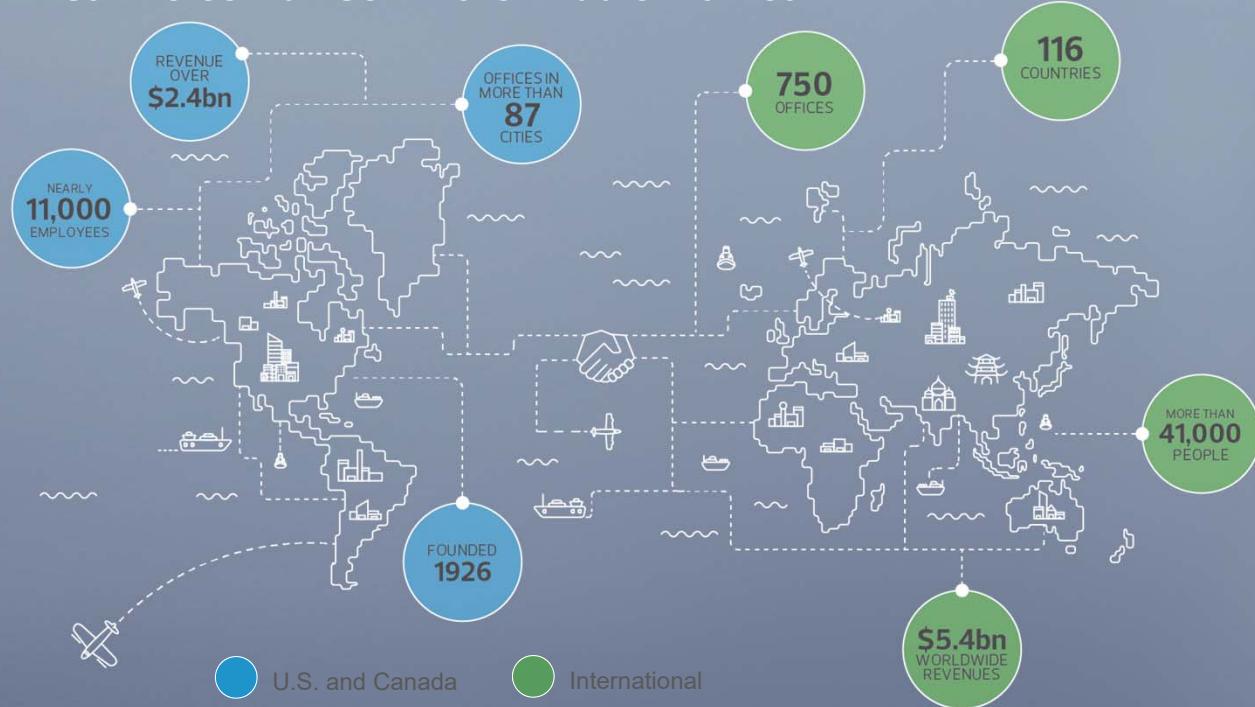
### 3. Dynamics 365 Finance and Operations is Microsoft's Enterprise Product



# RSM – WHO WE ARE

# RSM overview

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



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# RSM consulting overview

**194** partners/  
principals



**2,300+** clients



More than **3,000**  
consulting professionals



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

**46 languages**  
are spoken by  
RSM Consulting  
professionals



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



**\$597M**  
in revenue  
in FY19

**600+**  
private equity and  
portfolio clients



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



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



Microsoft US Partner of  
Year: Dynamics 365  
Finance and Operations



# RSM DYNAMICS 365 F&O PRACTICE OVERVIEW

# Microsoft Overview

- **Founded in 1975**
- **Offices in over 150 countries**
- **Over \$110B in annual revenues**
  - \$12B in R&D spend
- **Over 135,000 employees globally**
- **Microsoft Dynamics 365**
  - Full ERP functionality for Finance & Operations
  - Fully native solution
  - Fully integrated solution suite
  - Mid-market customer space
  - Modern object-oriented technology
  - Available in the Azure Cloud
- **Over 45,000 customers worldwide**
- **18% new customer growth YoY**
- **Robust Partner Channel**
  - Sales
  - Integrated Software Vendors (ISVs)
  - Implementation Services

## Microsoft Mission

Empower every person and every organization on the planet to achieve more



# Business Applications Solutions Ecosystem (BASE)



## Dynamics 365 [6M Users](#)

Sales	Customer Service	Field Service	Talent	Finance & Operations	Retail	Project Service Automation	Marketing	Business Intelligence	Artificial Intelligence	Mixed Reality
CRM	CRM	CRM	HR	ERP	ERP	CRM	CRM	BI	AI	AI
Accounts, Customers, Contacts, Leads, Relationships	Cases, Knowledge, Portals, Virtual Agents, Surveys, Unified Service Desk	Technician scheduling, inventory management	Recruiting, Onboarding, Feedback, Learning,	OMS, SCM, WMS, Manufacturing, Distribution, Financials	POS, Unified Commerce, Omni Channel, Loyalty	Project Service Plan, Deliver, Utilize, Optimize, Forecast	Lead Gen, Nurture, Multichannel, Campaigns	Embedded Power BI, Reporting, Dashboards, Data Analytics	Sales, Customer Service, Market Insights	HoloLens, Remote Assist, Business Integration

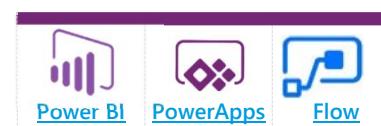
## Office 365 [120M Users](#)



## LinkedIn [500M Users](#)



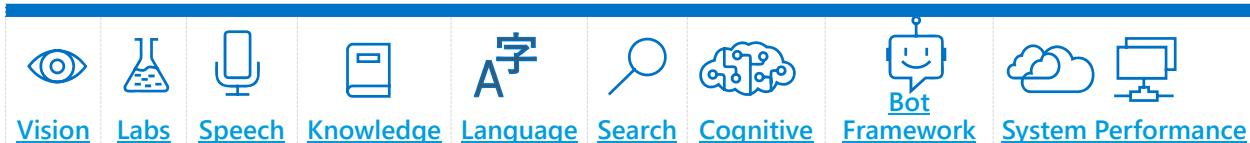
## Power Platform [5M Users](#)



## Common Data Service



## Azure Services [54 Regions, 140 Countries, 100 Data Centers, 70,000 miles fiber, 130 Edge Sites](#)



Security

Privacy

[Microsoft Trust Center](#)

Compliance

Transparency

# Microsoft ERP Solutions



## Dynamics 365 Finance

Finance management for middle and big companies



- Revenue Recognition
- Credit management
- Intercompany
- Treasury
- Organization
- administration
- Accounts receivable
- Budgeting
- Audit workbench
- Accounts payable
- Cash and bank management
- Cost management
- Consolidations
- General ledger
- Fixed assets
- Expense management
- Payroll
- Tax



## Dynamics 365 Supply Chain Management

Supply chain management for middle and big companies



- Asset management
- Master planning
- Self service portal
- Retail headquarter management
- Transportation management
- Inventory management
- Human resources
- Production control
- Product information management
- Procurement and sourcing
- Service management
- Sales and marketing Questionnaire
- Project management and accounting
- Warehouse management
- Vendor collaboration
- Time and attendance
- Fleet management
- Tax



## Dynamics 365 Business Central

Enterprise resource management for small and medium companies



- Planning
- Warehouse management
- Assembly management
- Production management
- Analytics
- XBRL
- Task management
- Service management
- Finance management
- Self service portal
- Treasury
- Inventory management
- Workflow
- Accounts receivable
- Budgeting
- Project management
- Human resource management
- CRM
- Fixed assets

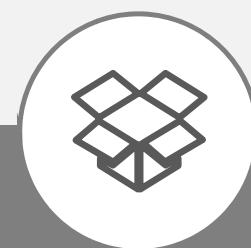
# Microsoft Dynamics 365 Practice

- **Dynamics 365 Solution Focus**
  - 450 employees focused on Microsoft Dynamics 365
  - Project Managers, Functional/Technical Analysts, Software Developers
  - Professionals that know the software, have strong consumer products industry expertise
- **Dynamics 365 End to End Services Focus**
  - Implementation Consulting Services
  - Managed Support Services
  - Training Academy
  - Near-Shore Development
- **Adjacent Services**
  - Microsoft Azure & Infrastructure
  - Supply Chain
  - Project, Program and Change Management
  - Data Analytics & Business Intelligence (BI)
  - Tax Services
  - ...and more
- **Customer Focus – Success is Paramount**
  - Over 400 Dynamics 365 Customers



# The Advantages of Microsoft Dynamics 365

## Practical



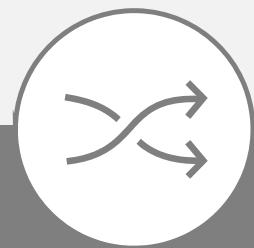
Start with only the apps you need and grow at your own pace

## 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

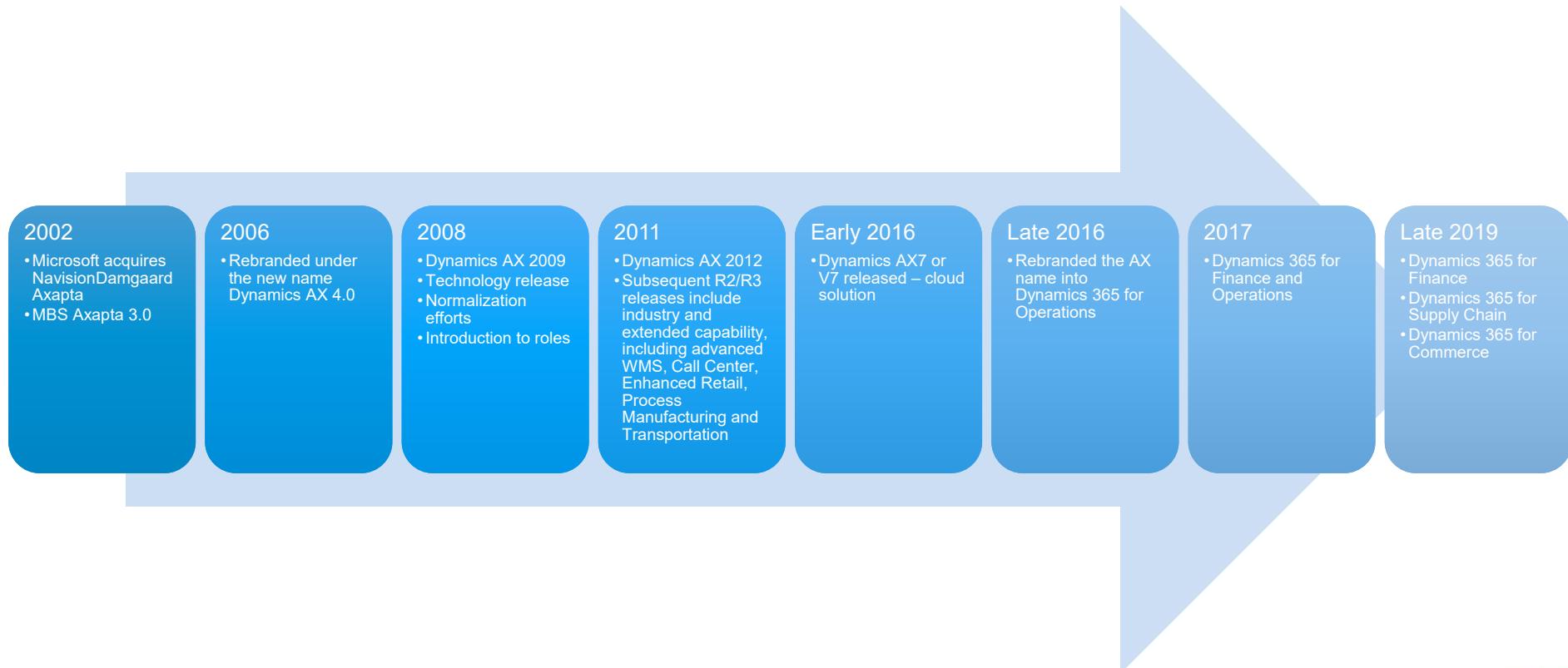
# DYNAMICS 365 F&O OVERVIEW, HIGHLIGHTS, & DIFFERENTIATORS

## Announcement

# Announcing changes to Dynamics 365 for Finance and Operations

Dynamics 365 for Finance and Operations is now two applications—Dynamics 365 [Finance](#) and Dynamics 365 [Supply Chain Management](#)—to offer you more flexibility to adopt the capabilities you need, when you need them.

# A brief history of Dynamics 365 F&O

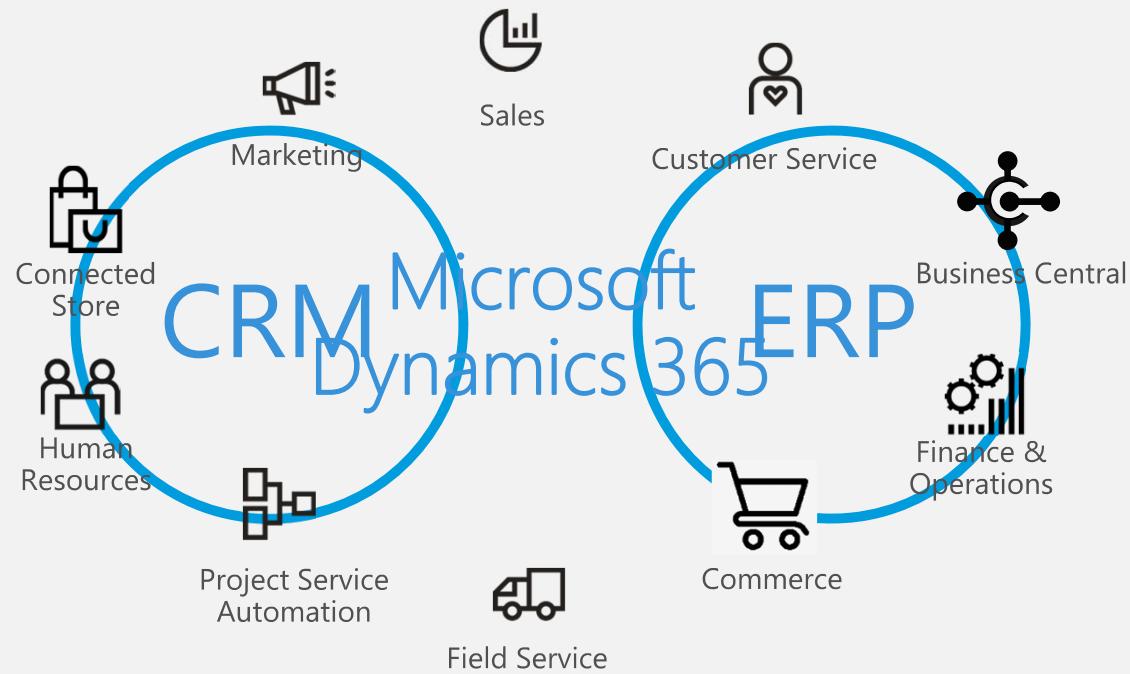


# Digital Transformation

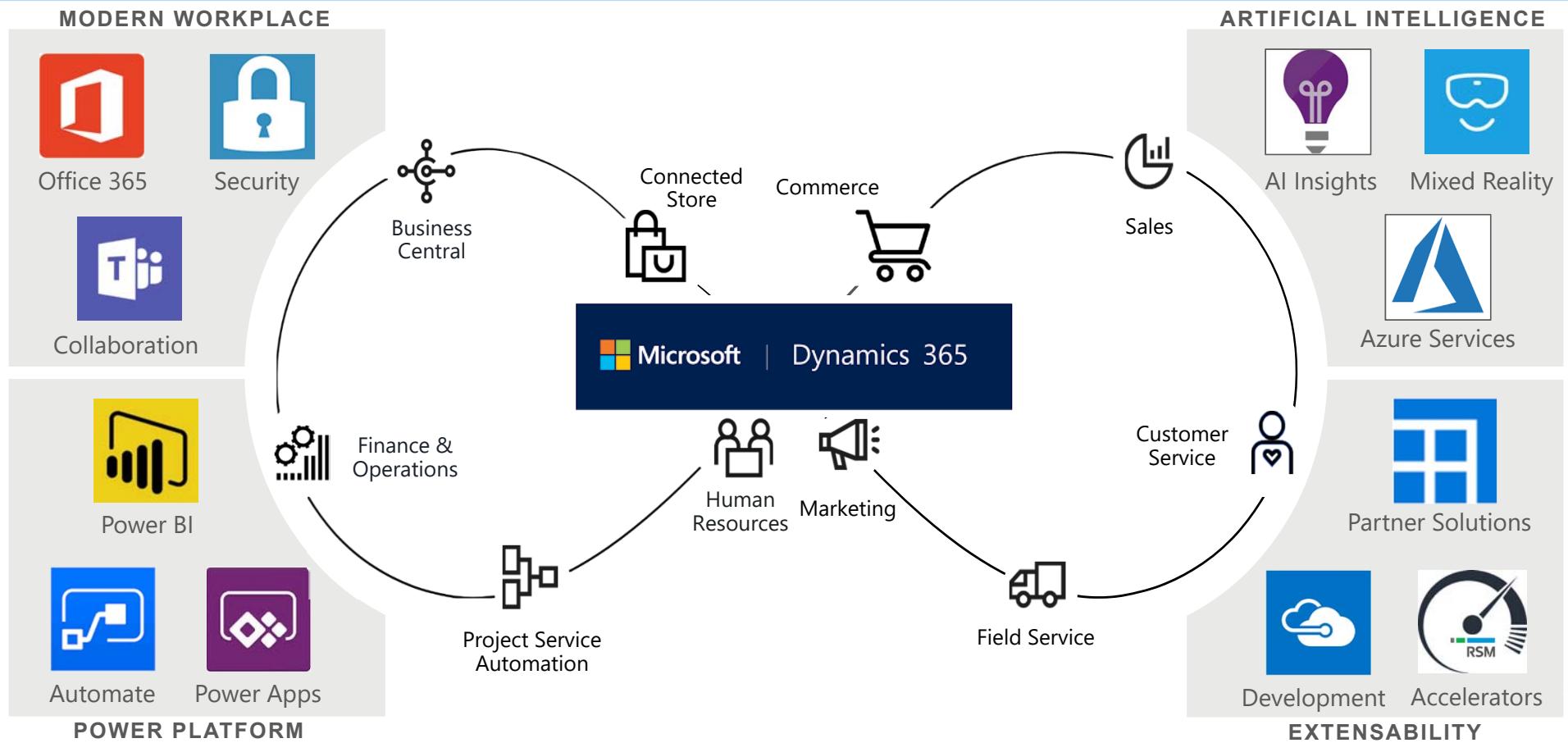
CRM

ERP

# Digital Transformation



# Microsoft Cloud Ecosystem



# Functional Capability

Financial Management	General ledger	Accounts Payable	Accounts Receivable	Cash & bank Management	Credit & Collections	Fixed Assets	Financial Reporting
Public Sector	AP for Public Sector	AR for Public Sector	Budget & Forecast	Funds			
Procurement & Sourcing	Requisitions	Request for Quotations	Purchase Order Management	Vendor Collaboration			
Sales & Marketing	Sales Order Management	Relationships & Marketing	Sales Agreements	Prices & Discounts			
Supply Chain Management	Warehouse management	Inventory Management	Transport Management	Quality Management	Batch Management		
Resource Management	Resource Specification	Material Req. Planning	Capacity Planning	Resource Scheduling	Asset Management		
Manufacturing	Discrete Manufacturing	Process Manufacturing	Lean Manufacturing	Manufacturing Execution	Manufacturing Accounting		
Product Information management	Product Configuration	Product Master Data	Product Process Data				
Project Management & Accounting	Time & Expense	Project Quotations	Project Contracts	Work Breakdown	Project Resources	Project Invoicing	
Service Management	Service Objects	Service Orders	Service Agreements				

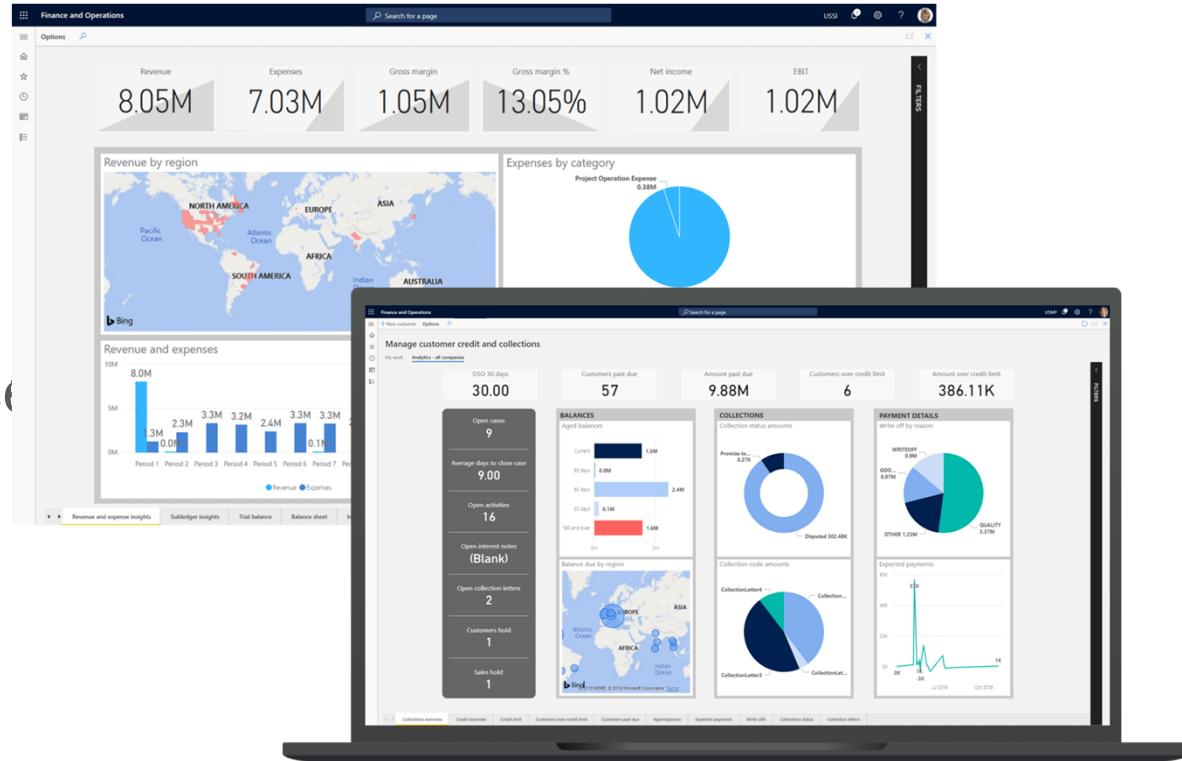
# Functional Spotlight: Procurement

- Requisition through Invoice
- Inventory purchasing with planning, MRO and Fixed Assets
- Native PunchOut capability via CXML
- Workflow enabled



# Functional Spotlight: Financials

- Drive strategic financial decisions with AI
- Unify and automate your financial processes
- Reduce operational expenses
- Decrease global financial complexity and risk



## Functional Spotlight: Financials (contd.)

### Reporting and consolidation



Budget	General Ledger	Accounts Payable	Accounts Receivable	Fixed Assets	Project Accounting
Build and maintain your budgets with Microsoft Excel	Analyze your finances the way you want	Manage your vendor relations and disbursements	Efficiently manage customer invoices and collections	Automate your acquire-to-retire process	Designed to provide a service, produce a product, or achieve a result

#### Discipline at the core

##### IT Control:

- Connect & Integrate
- Monitor & Govern
- Deploy & Scale

#### Flexibility at the Edges

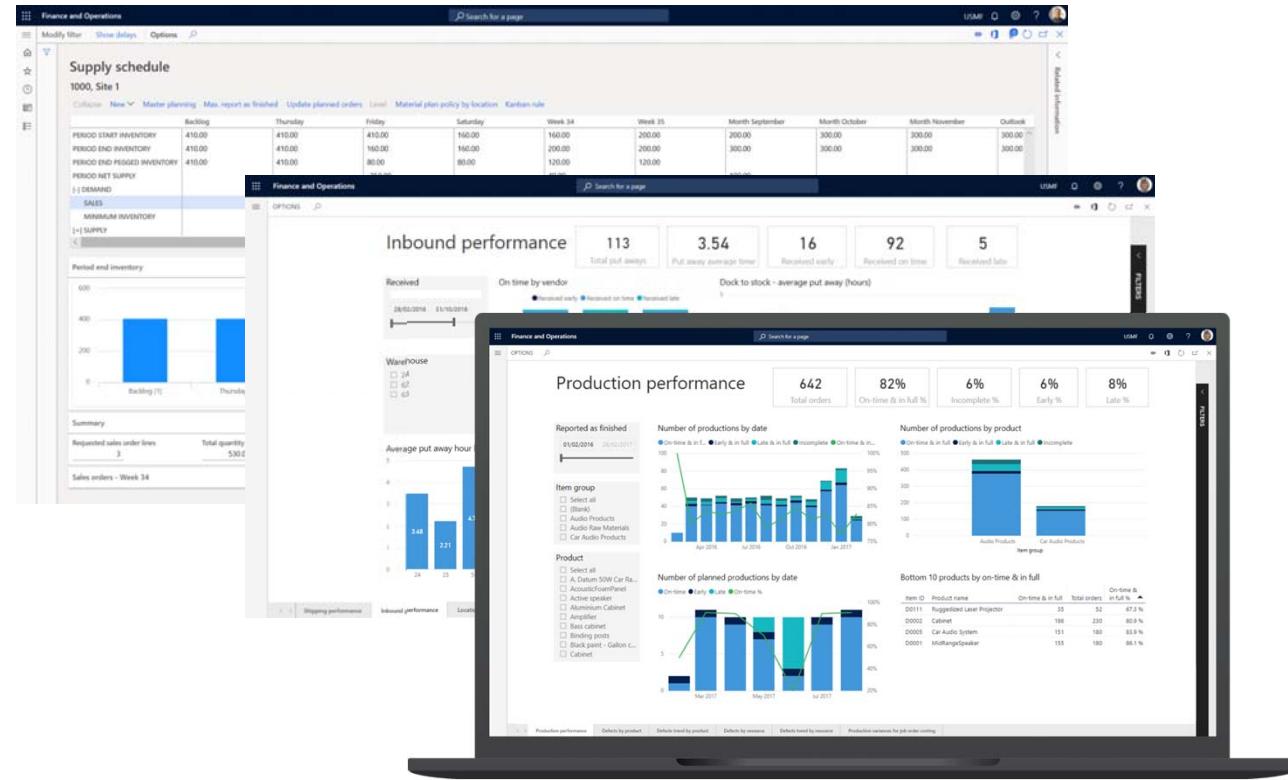
##### End User Agility:

- Search & Analyze
- Share & Collaborate
- Access on any device



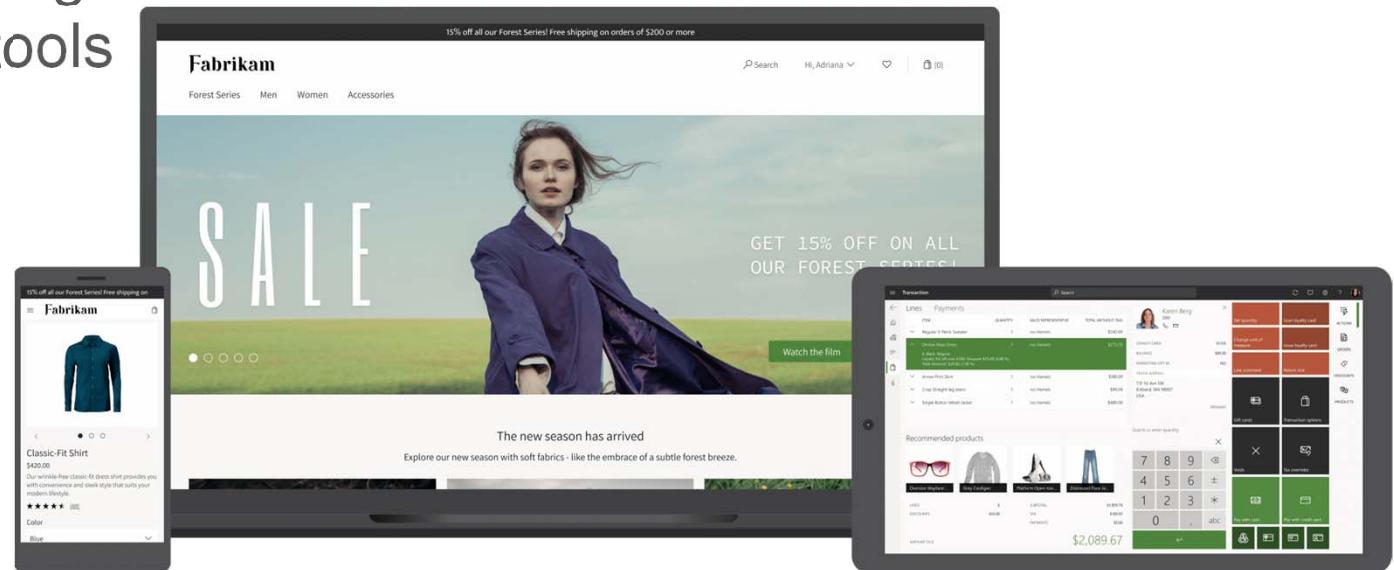
# Functional Spotlight: Manufacturing

- Innovate with intelligent manufacturing operations
- Maximize the life of your assets with Asset Management
- Modernize warehouse management
- Automate and streamline your supply chain

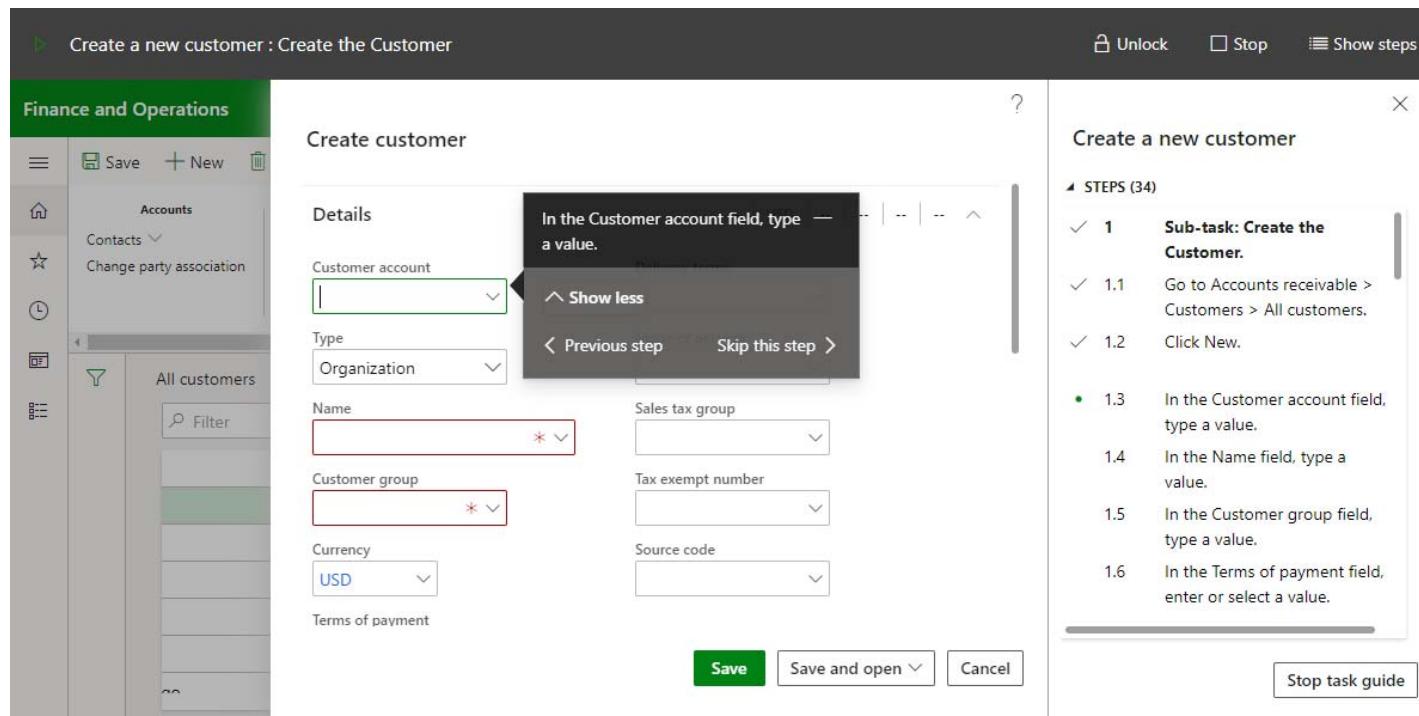


# Functionality Spotlight: Retail and Commerce

- Built-in POS capability
- Built-in web authoring and development tools
- Omnichannel
- Build loyalty and exceed customer expectations



# Task Recorder



- Author and document business process
- Digitally capture and store documentation
- Multi-use capability for automated testing, troubleshooting and security

# Embedded Power BI / Analytics

The image displays two separate Power BI dashboards side-by-side, illustrating the use of embedded analytics.

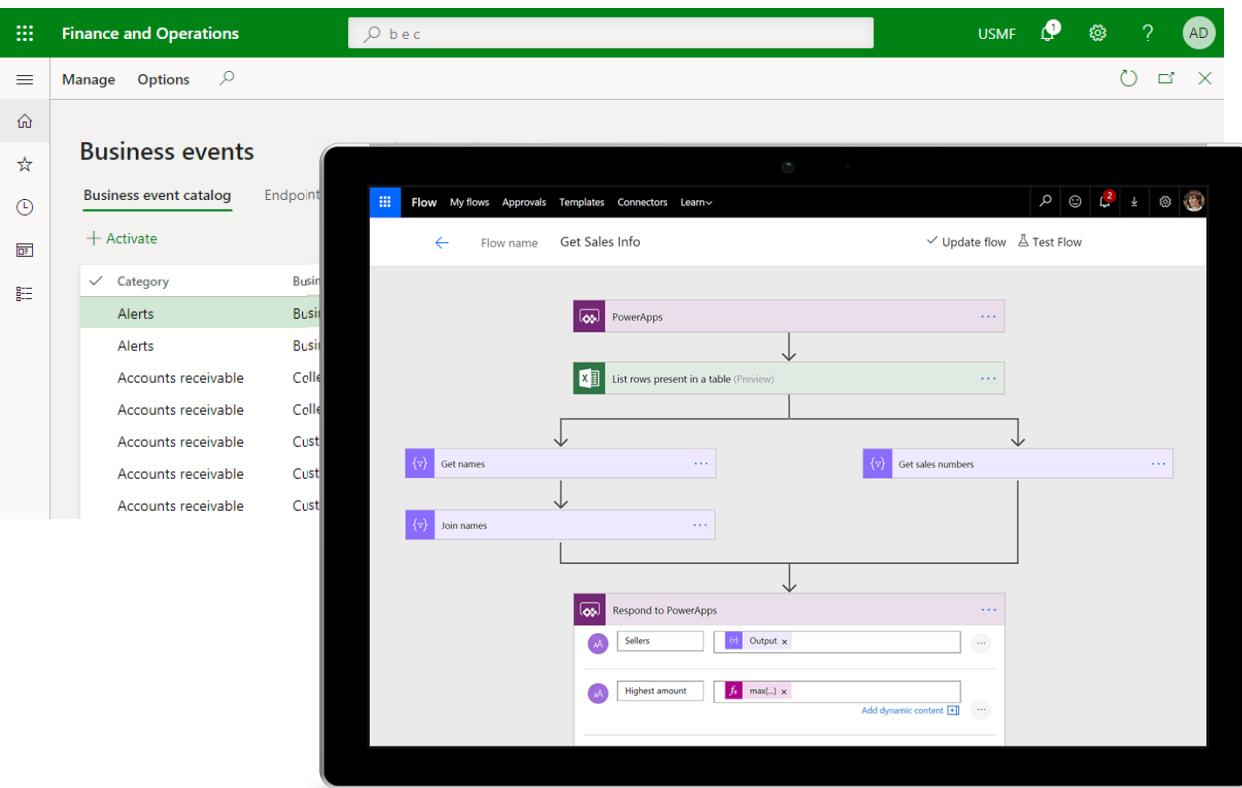
**Left Dashboard (Sales Manager):**

- Header:** Power BI, My workspace > Sales Manager.
- Top Row:** Won Revenue (437.02K), Win Count (3), Win Rate - Closed (100.00), Average Deal Size (9.76K), Average Deal Age(Days) (92.96), Average Deal Size (5.28M).
- Visuals:**
  - Bar chart: Won Revenue by Country/Region (USA, Mexico, Canada).
  - Gauge: Won Revenue vs Estimated Revenue (0.00).
  - Bar chart: Won Revenue by Owner (Daren Se, Diane Taylor, Rob Fine, Total).
  - Stacked bar chart: Est. Revenue by State/Province (WA, GA, NC, TX, MN, IL, CA, NY).
- Bottom Row:** Sales Performance, Sales Leaderboard, Win/Loss Analysis, Sales Pipeline, Sales Pipeline Leaderboard, Sales Activity, Open Activities, Account Analysis, Top Won/Lost Deals.
- Left Sidebar:** Power BI navigation bar, Home, Favorites, Recent, Apps, Shared with me, Workspaces, My workspace (Sales Manager selected), Workbooks, Datasets, CRM Sales Accelerator, Customer Service, FieldService365v9, Get data.
- Bottom:** PSA Account Mana..., Sales Manager, Reports, ATS Report, CRM Sales Accelerator, FieldService365v9..., Get data.

**Right Dashboard (FieldService365v9):**

- Header:** Power BI, My workspace > FieldService365v9\_RSMFSPSA.
- Top Row:** Last Month (2.90K), This Month (99.36K).
- Visuals:**
  - Text: 89.
  - Donut chart: Billed Amount by Service Type (Service 64.17K, Installation 41.74K, Preventative Maintenance 13.11K).
  - Donut chart: Total Cost by Service Type (Service Call 58.15K, Installation 28.74K, Preventative Maintenance 13.11K).
  - Text: Revenue Amounts Current Quarter (Edgewater 23.58K, Longwood/Orlando 36.19K, Raleigh 35.60K).
  - Bar chart: Total Amount Billed (Edgewater, Longwood/Orlando, Raleigh).
  - Bar chart: Revenue by Business Unit (Edgewater, Longwood/Orlando, Raleigh).
- Bottom:** FILTERS, FILTERS.

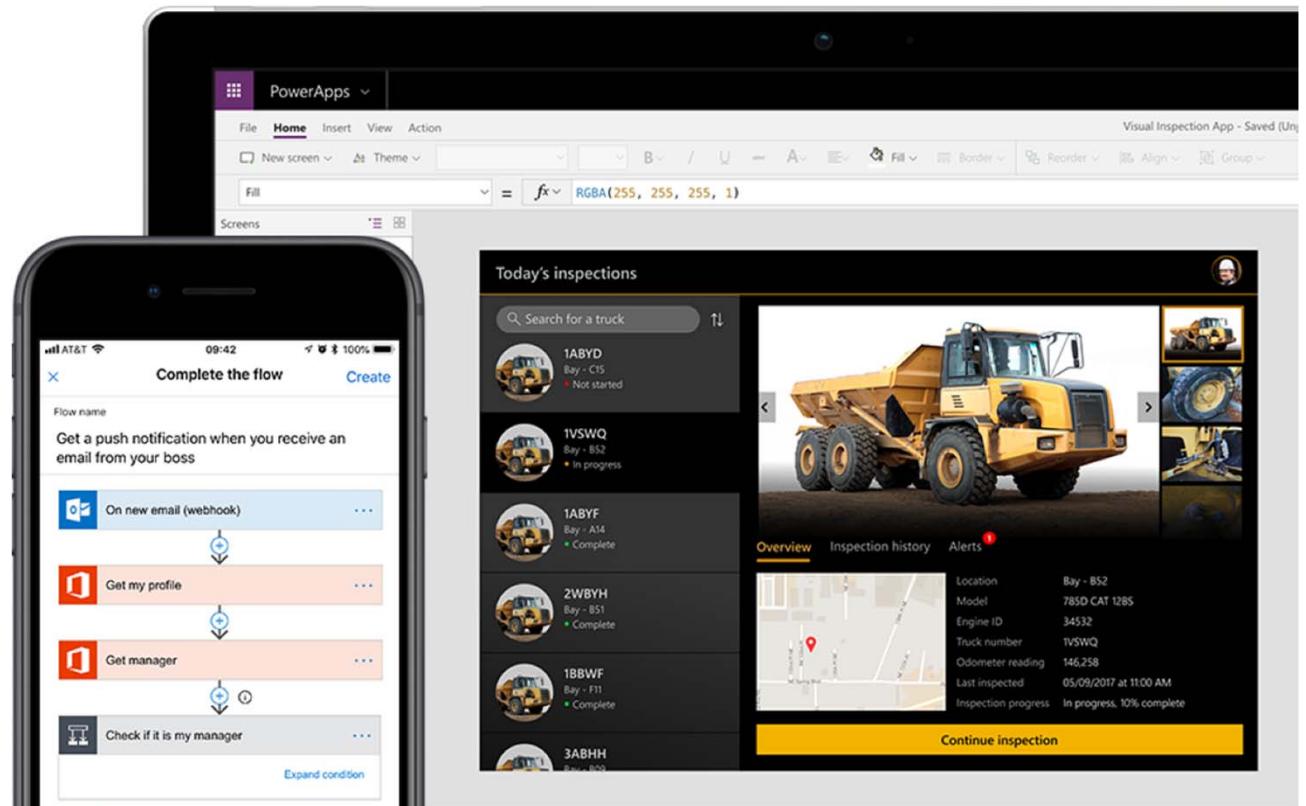
# Business Events & Power Automate



- Notify external systems
- Extend Dynamics capability from within Power Automate
- Interact with Dynamics via the Power Automate connector

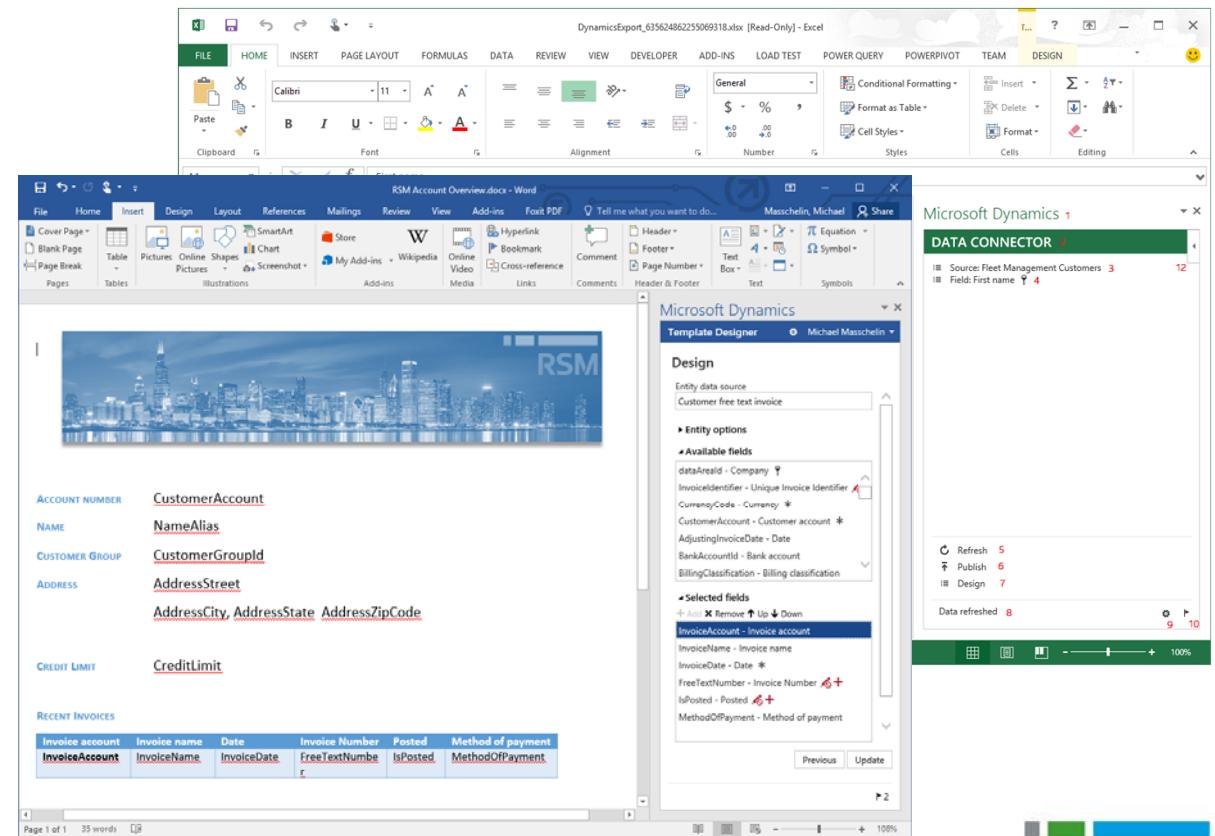
# Embedded Power Apps Capability

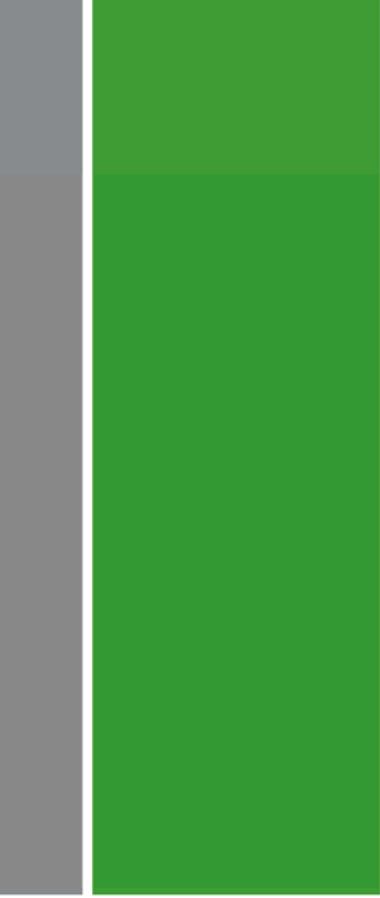
- Build beautiful apps outside of Dynamics
- Low-code, no code
- Embed app directly into Dynamics 365



# Dynamics 365 Office Add-in

- Dynamics supports some of our favorite tools from Microsoft
- Odata Services on more than 2700 endpoints
- Connected spreadsheet with security
- Two-way connectivity allows editing in Excel

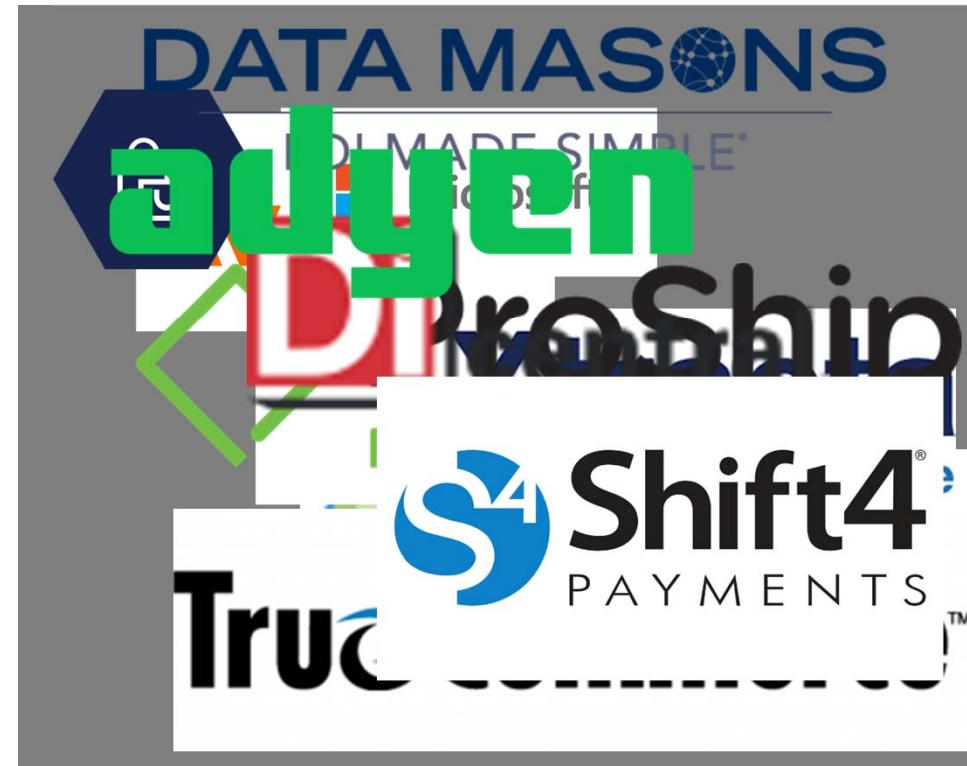




# DYNAMICS 365 F&O PARTNERSHIPS

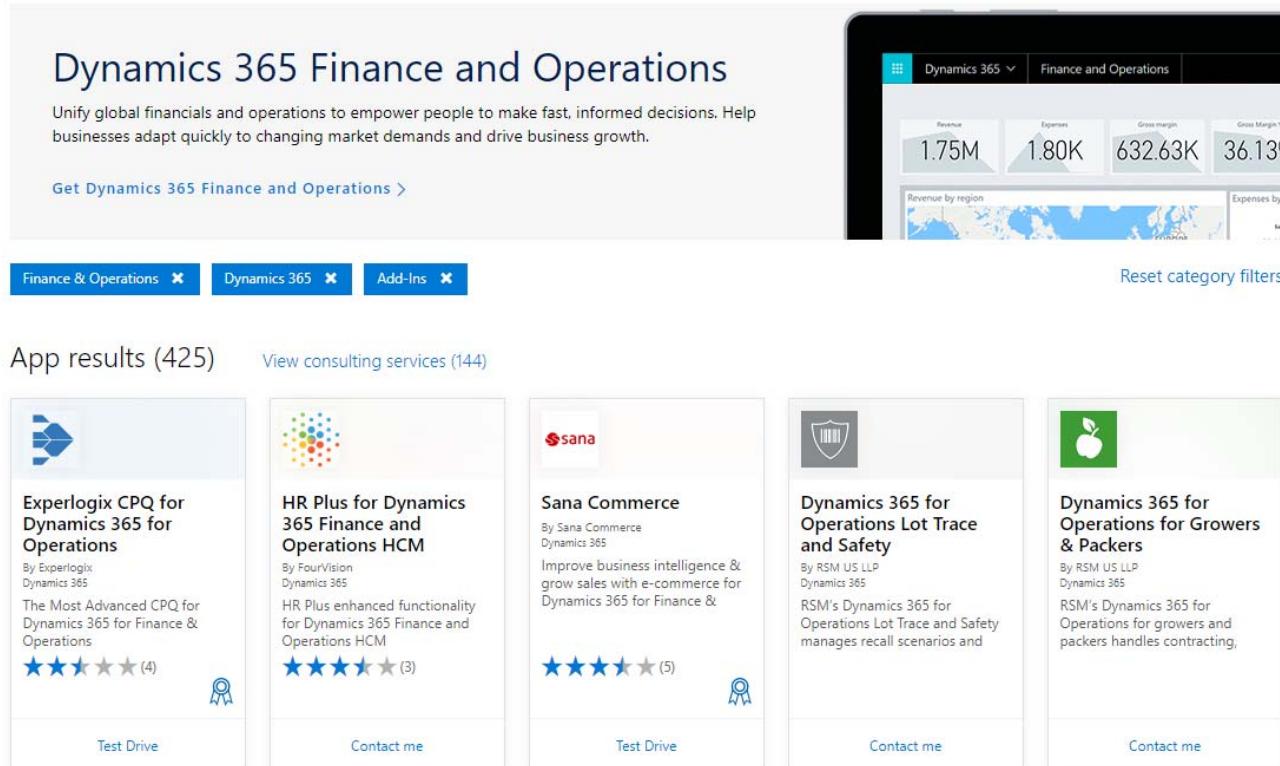
## Extending the Solution Further

- Tax
- OCR & AP Automation
- Portal / e-commerce
- Small Parcel Shipping
- EDI
- Credit Card



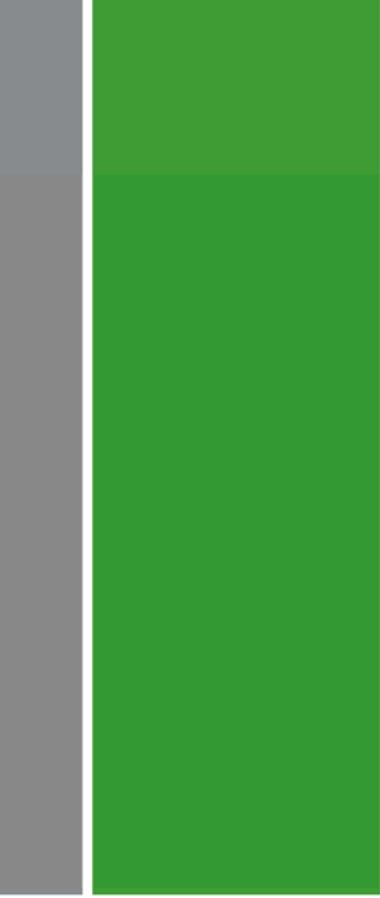
## Add industry specific apps with ease

- 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



The image shows a screenshot of the Microsoft AppSource website. At the top, there is a search bar with the text "Dynamics 365" and a dropdown menu showing "Finance and Operations". Below the search bar, there is a section titled "Dynamics 365 Finance and Operations" with a brief description: "Unify global financials and operations to empower people to make fast, informed decisions. Help businesses adapt quickly to changing market demands and drive business growth." A "Get Dynamics 365 Finance and Operations >" button is present. Below this, there are three filter buttons: "Finance & Operations", "Dynamics 365", and "Add-Ins". The main content area shows "App results (425)" and a "View consulting services (144)" link. Five app cards are displayed in a grid:

- Experlogix CPQ for Dynamics 365 for Operations** by Experlogix Dynamics 365. Description: "The Most Advanced CPQ for Dynamics 365 for Finance & Operations". Rating: 4 stars (4 reviews). Buttons: "Test Drive" and "Contact me".
- HR Plus for Dynamics 365 Finance and Operations HCM** by FourVision Dynamics 365. Description: "HR Plus enhanced functionality for Dynamics 365 Finance and Operations HCM". Rating: 3 stars (3 reviews). Buttons: "Contact me".
- Sana Commerce** by Sana Commerce Dynamics 365. Description: "Improve business intelligence & grow sales with e-commerce for Dynamics 365 for Finance & Operations". Rating: 5 stars (5 reviews). Buttons: "Test Drive" and "Contact me".
- Dynamics 365 for Operations Lot Trace and Safety** by RSM US LLP Dynamics 365. Description: "RSM's Dynamics 365 for Operations Lot Trace and Safety manages recall scenarios and". Buttons: "Contact me".
- Dynamics 365 for Operations for Growers & Packers** by RSM US LLP Dynamics 365. Description: "RSM's Dynamics 365 for Operations for growers and packers handles contracting,". Buttons: "Contact me".



# DYNAMICS 365 F&O INDUSTRY FOCUS

# Dynamics 365 Industry Focus



- Education
- Manufacturing
- Industrial Products
- Financial Services
- Professional Services
- Government
- Retail
- Consumer Goods
- Healthcare
- Media & Communications
- Energy
- Travel and Transportation
- Not for Profit

# RSM Focus Industries

- Food and Beverage
  - Protein
  - Produce
  - Dairy
  - Process Manufacturing
- Retail
  - Brick and Mortar
  - Consumer Packaged Goods
  - Multi-Channel
- Life Sciences
  - Pharmaceutical
  - Medical Device
- Not For Profit
- Chemical
- Financials



# Accelerators



Commodity Contract Management for Dairy (CCM)



Commodity Contract Management for Grower (CCM)



Advance Load Building (PTL)



Direct to Consumer (D2C)



Postage and Handling (PAH)



Retail Reporting Pack (RRP)



Life Science Essentials (LSS)



Lot Trace and Safety (ITH)



Advanced Trade Promotions Management (TPM)



ProShip Integration (PSS)



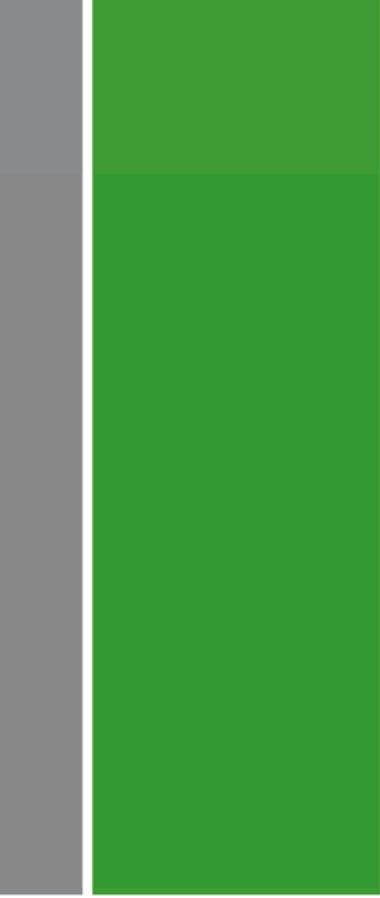
Sales Proration (SPA)



Xtracta Optical Character Recognition (OCR)



Advanced Financials (AFI)



USE GP TODAY?  
WHY CONSIDER  
DYNAMICS 365 F&O?

## Talking Points

- Reduce Systems
- Reduce integrations
- Consume more from native functionality
- Need to do something
- Take advantage of continuous software capability
- Want more analytics
- Power Platform & rise of the citizen developer

# CUSTOMER STORY

# Road to Dynamics 365 F&O

- Case Study: Rhythm Pharmaceuticals (NASDAQ: RYTM)
  - QuickBooks → D365 conversion
  - 50 employees and growing
  - Modules: financials (AP, GL, Bank, FA), inventory, purchase requisitions, workflow w/mobile approvals
  - 9 week implementation
- Pharmaceutical Commercial operation
  - 200+ employees
  - GP to D365 F&O
  - Multiple international legal entities for product sales
  - Modules: financials, purchasing, inventory, outsourced distribution and outsourced manufacturing
  - 7 month implementation
- Food Manufacturing / Consumer Packaged Goods
  - Currently 20 ISV & 3<sup>rd</sup> Party Solutions
  - 75% of these solutions are consumed with core ERP
  - Cost savings on maintenance, minimize integrations

# QUESTIONS AND ANSWERS



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