



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

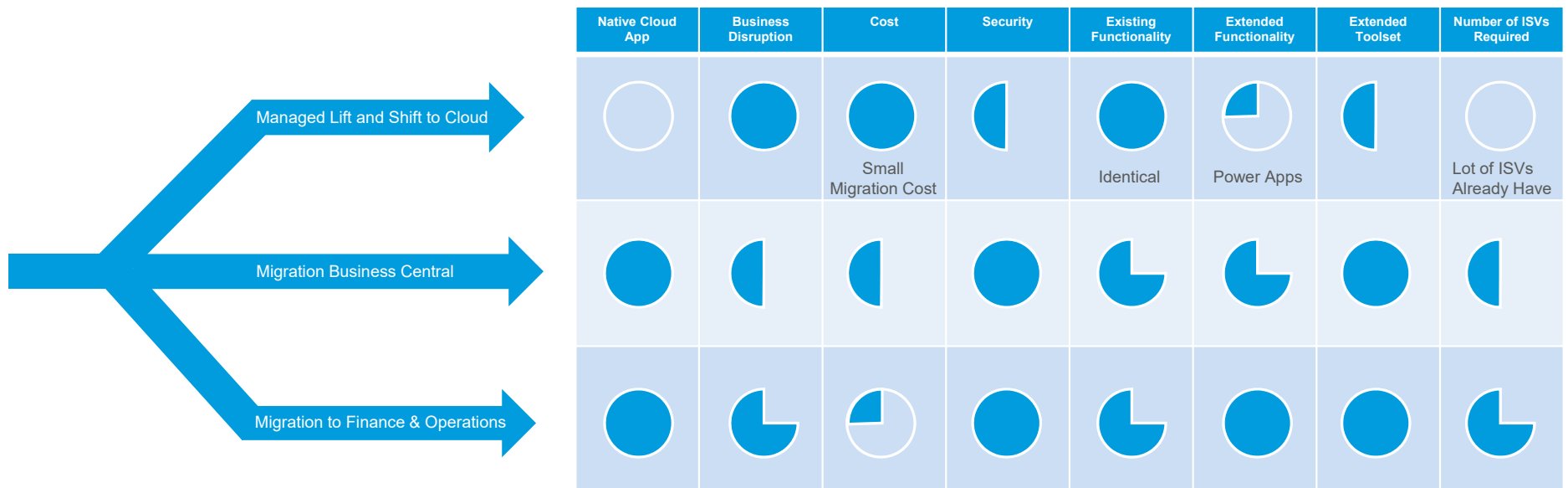
Dynamics 365 Partner since 2006

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

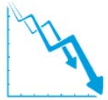


2. Perfect Storm of Factors Created SaaS Industry

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



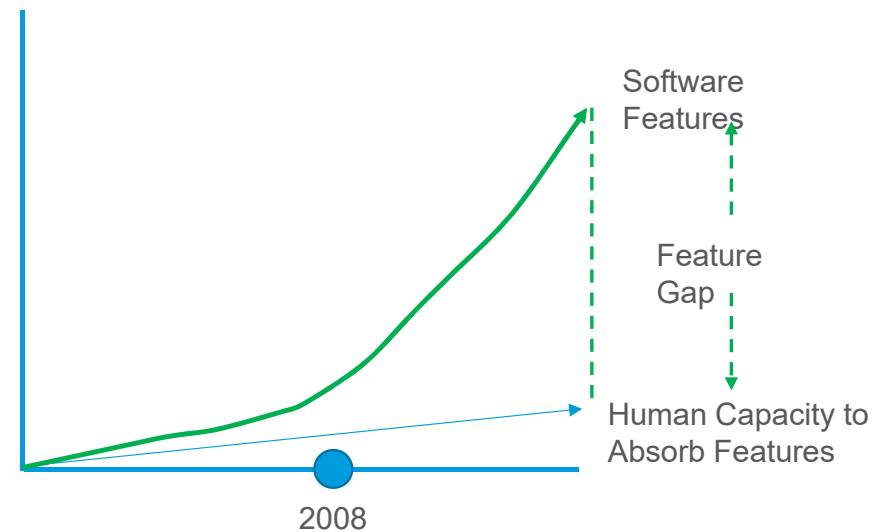
Cloud Computing Got Real

Limitations on bandwidth and capacity reduced

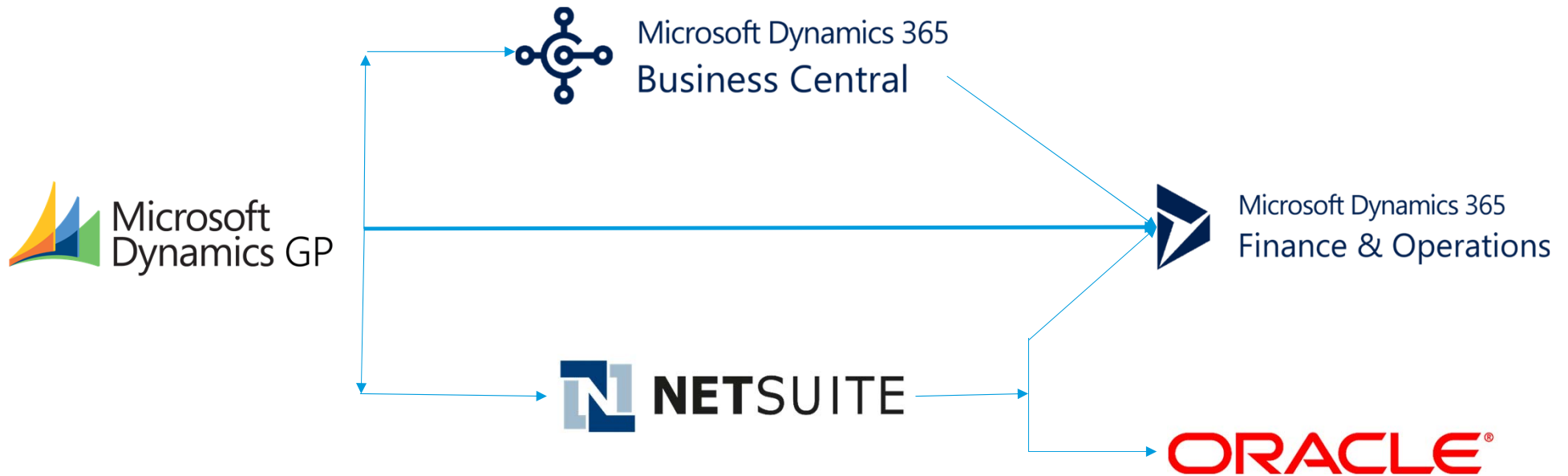


iPhone

There is an App for that.



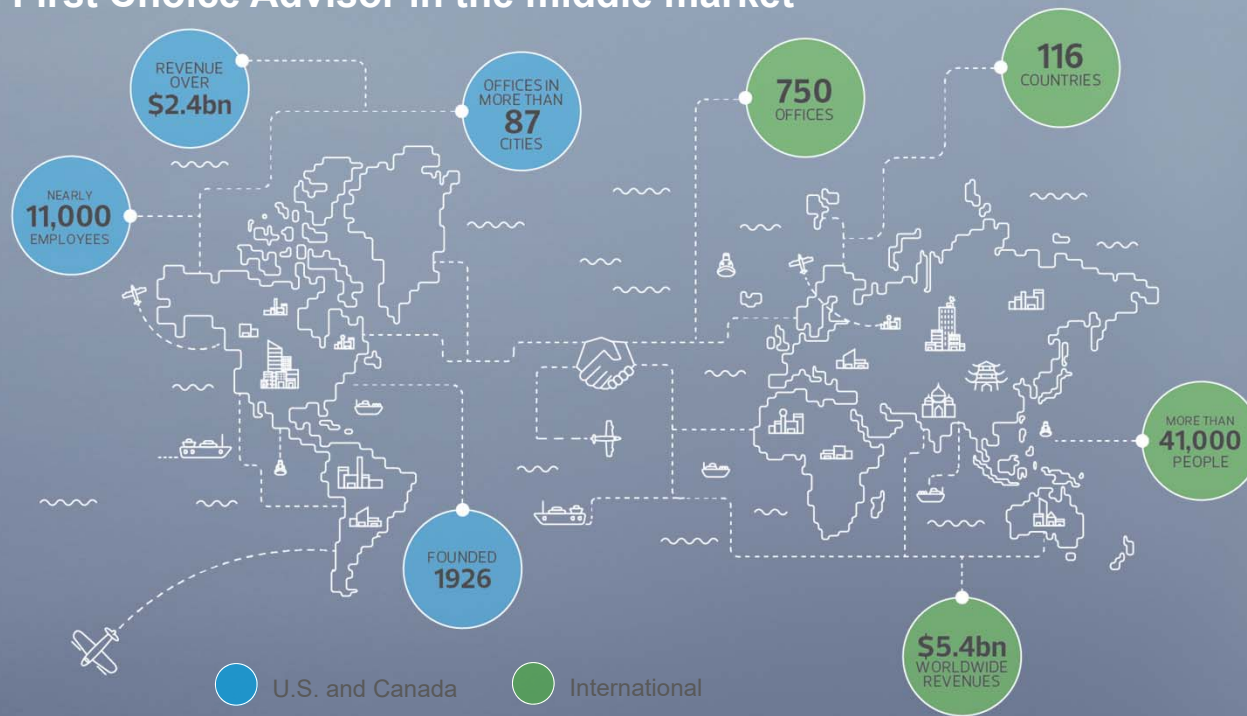
3. Dynamics 365 Finance and Operations is Microsoft's Enterprise Product



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



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



\$597M
in revenue
in FY19

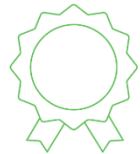
2,300+
clients



More than **3,000**
consulting professionals



600+
private equity and
portfolio clients



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

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



46 languages
are spoken by
RSM Consulting
professionals



**Gold Enterprise Resource
Planning (ERP) Competency
& Inner Circle with Microsoft**



**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](#)

Outlook	Sharepoint	OneNote	Teams	Excel	Word

LinkedIn [500M Users](#)

Relationship Sales	Talent	Attract

Power Platform [5M Users](#)

Power BI	PowerApps	Flow

Common Data Service

Common Data Model	Cloud Services	Data Connectors	Data Store	Data API

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

Vision	Labs	Speech	Knowledge	Language	Search	Cognitive	Bot Framework	System Performance

64,000 [Partners](#)

Industry Solutions

[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
- Accounts payable
- 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



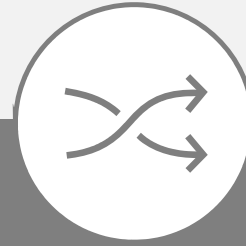
Start with only the apps
you need and grow
at your own pace

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

2002

- Microsoft acquires NavisionDamgaard Axapta
- MBS Axapta 3.0

2006

- Rebranded under the new name Dynamics AX 4.0

2008

- Dynamics AX 2009
- Technology release
- Normalization efforts
- Introduction to roles

2011

- Dynamics AX 2012
- Subsequent R2/R3 releases include industry and extended capability, including advanced WMS, Call Center, Enhanced Retail, Process Manufacturing and Transportation

Early 2016

- Dynamics AX7 or V7 released – cloud solution

Late 2016

- Rebranded the AX name into Dynamics 365 for Operations

2017

- Dynamics 365 for Finance and Operations

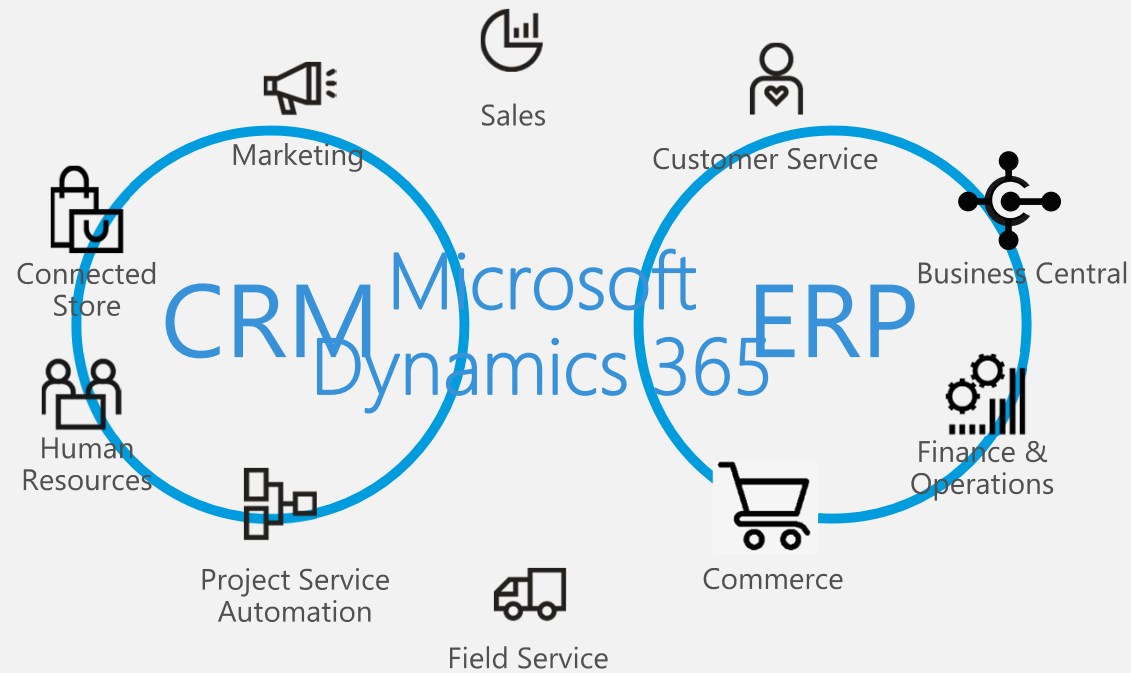
Late 2019

- Dynamics 365 for Finance
- Dynamics 365 for Supply Chain
- Dynamics 365 for Commerce

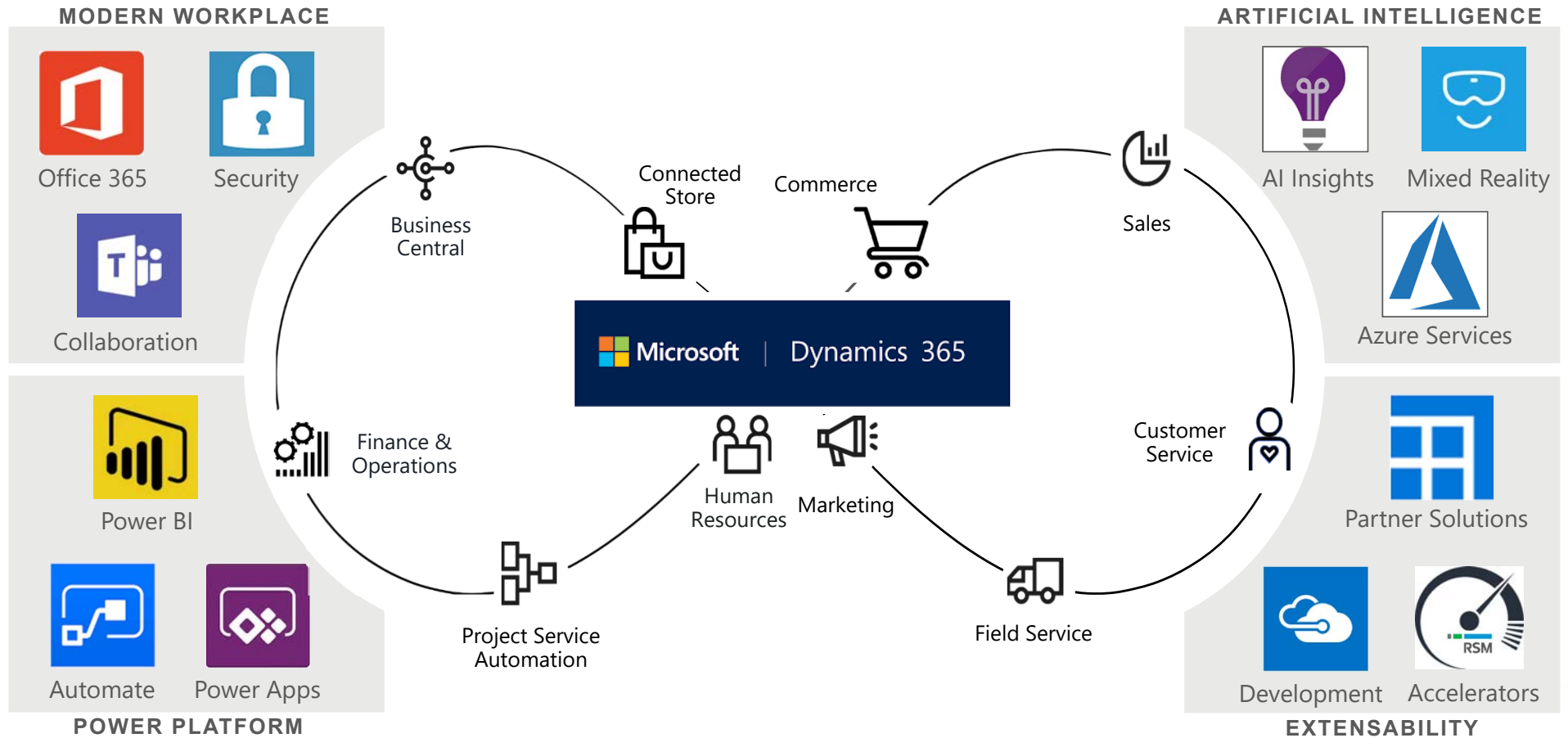
Digital Transformation



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



The screenshot shows the SAP Finance and Operations procurement interface. The left sidebar lists various procurement categories under 'Office Supplies USMF', including 'CORP PROCUREMENT CATEGORIES', 'OFFICE MACHINES', 'OFFICE AND DESK ACCESSORIES', 'PAYROLL', 'VEHICLES', 'RENT', 'ADVERTISING', 'UTILITIES', 'Cars', 'Tractors', 'Computers', 'Standard envelopes', 'Staplers', 'Scissors', 'Pen or pencil sets', and 'Highlighters'. The main area displays the 'Purchase requisition' for '000021 : Sara Thomas'. The 'Purchase requisition header' section shows details such as 'Preparer: Sara Thomas', 'Status: Closed', 'Requested date: 1/23/2017', 'Requisition purpose: Consumption', and 'Accounting date: 1/23/2017'. The 'Purchase requisition lines' table lists two items:

Line	Req. Item	Req. Item Description	Req. Item Category	Item Number	Product Name	Quantity	Unit	Unit Price	Net Amount	Currency	Vendor Account	Vendor Name	Status
1	Sara Thomas	USMF	Finance	C004	Computers	1.00	ea	39.95	39.95	USD	US-111	Corliss office supply	Closed
2	Sara Thomas	USMF	Finance		OFFICE AND DESK ACCESSORIES	1.00	ea	165.00	165.00	USD	US-111	Corliss office supply	Closed

Functional Spotlight: Financials

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



Functional Spotlight: Financials (contd.)

Reporting and consolidation



Budget

Build and maintain your budgets with Microsoft Excel

General Ledger

Analyze your finances the way you want

Accounts Payable

Manage your vendor relations and disbursements

Accounts Receivable

Efficiently manage customer invoices and collections

Fixed Assets

Automate your acquire-to-retire process

Project Accounting

Designed to provide a service, produce a product, or achieve a result

Discipline at the core

IT Control:

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

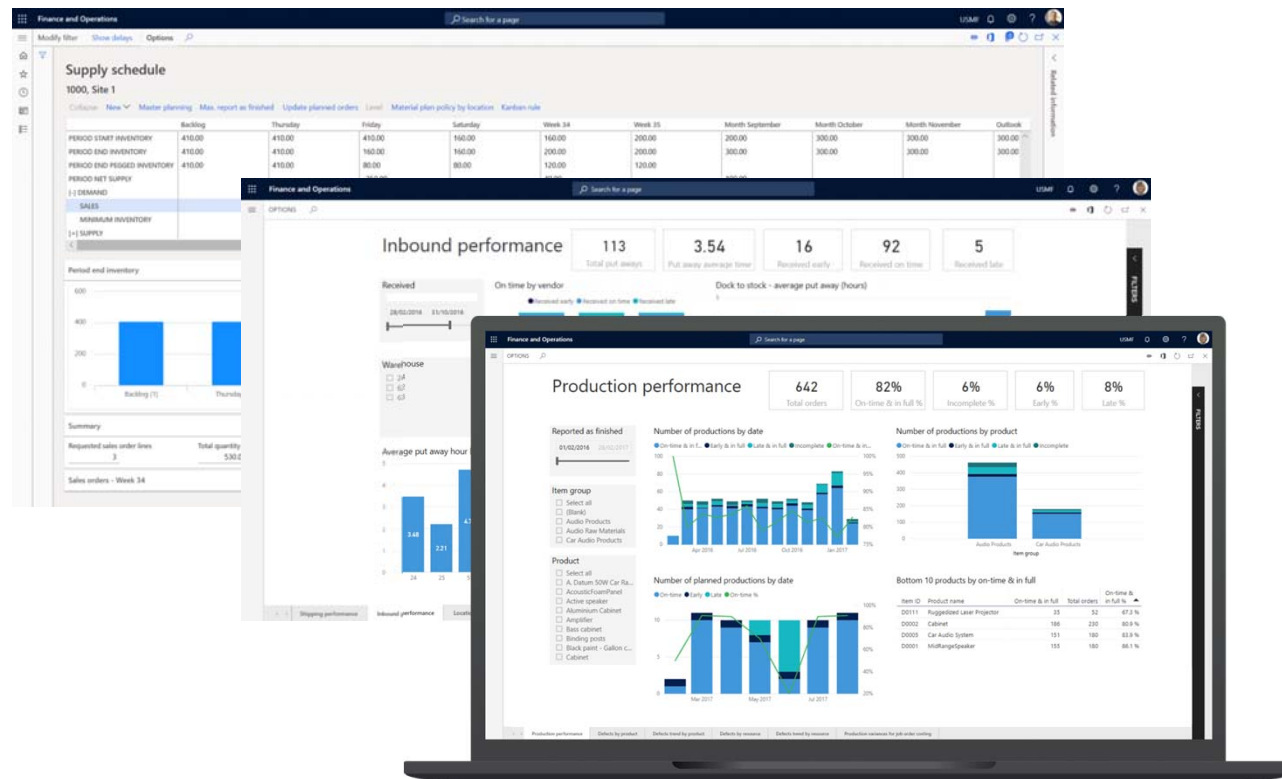
Flexibility at the Edges

End User Agility:

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

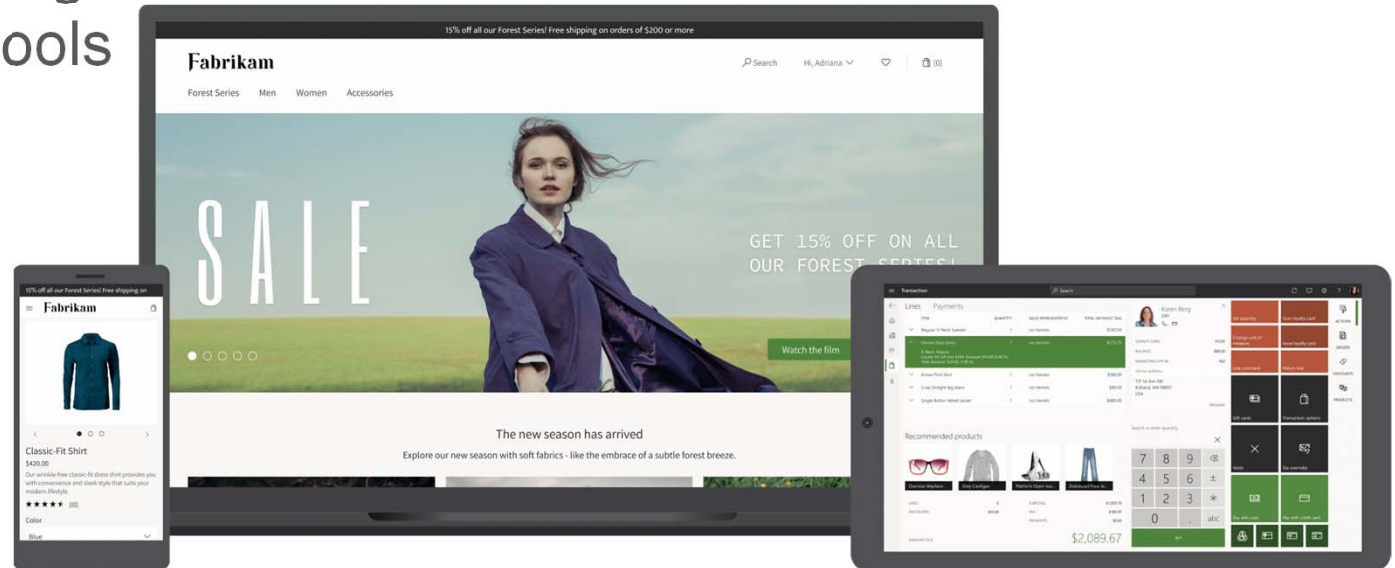
Functional Spotlight: Manufacturing

- 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

The screenshot displays a software interface for creating a new customer. The main form is titled 'Create customer' and includes fields for 'Customer account', 'Type' (set to 'Organization'), 'Name', 'Customer group', 'Currency' (set to 'USD'), 'Terms of payment', 'Sales tax group', 'Tax exempt number', and 'Source code'. A task recorder overlay is visible, showing a list of steps for 'Create a new customer'. The first step is 'Sub-task: Create the Customer', which includes sub-steps 1.1 through 1.6. A tooltip is also present, indicating that a value must be entered in the 'Customer account' field.

Create a new customer : Create the Customer

Unlock Stop Show steps

Finance and Operations

Save + New

Accounts

Contacts

Change party association

All customers

Filter

Create customer

Details

Customer account

Type

Organization

Name

Customer group

Currency

USD

Terms of payment

Sales tax group

Tax exempt number

Source code

Save Save and open Cancel

Create a new customer

STEPS (34)

1 Sub-task: Create the Customer.

1.1 Go to Accounts receivable > Customers > All customers.

1.2 Click New.

1.3 In the Customer account field, type a value.

1.4 In the Name field, type a value.

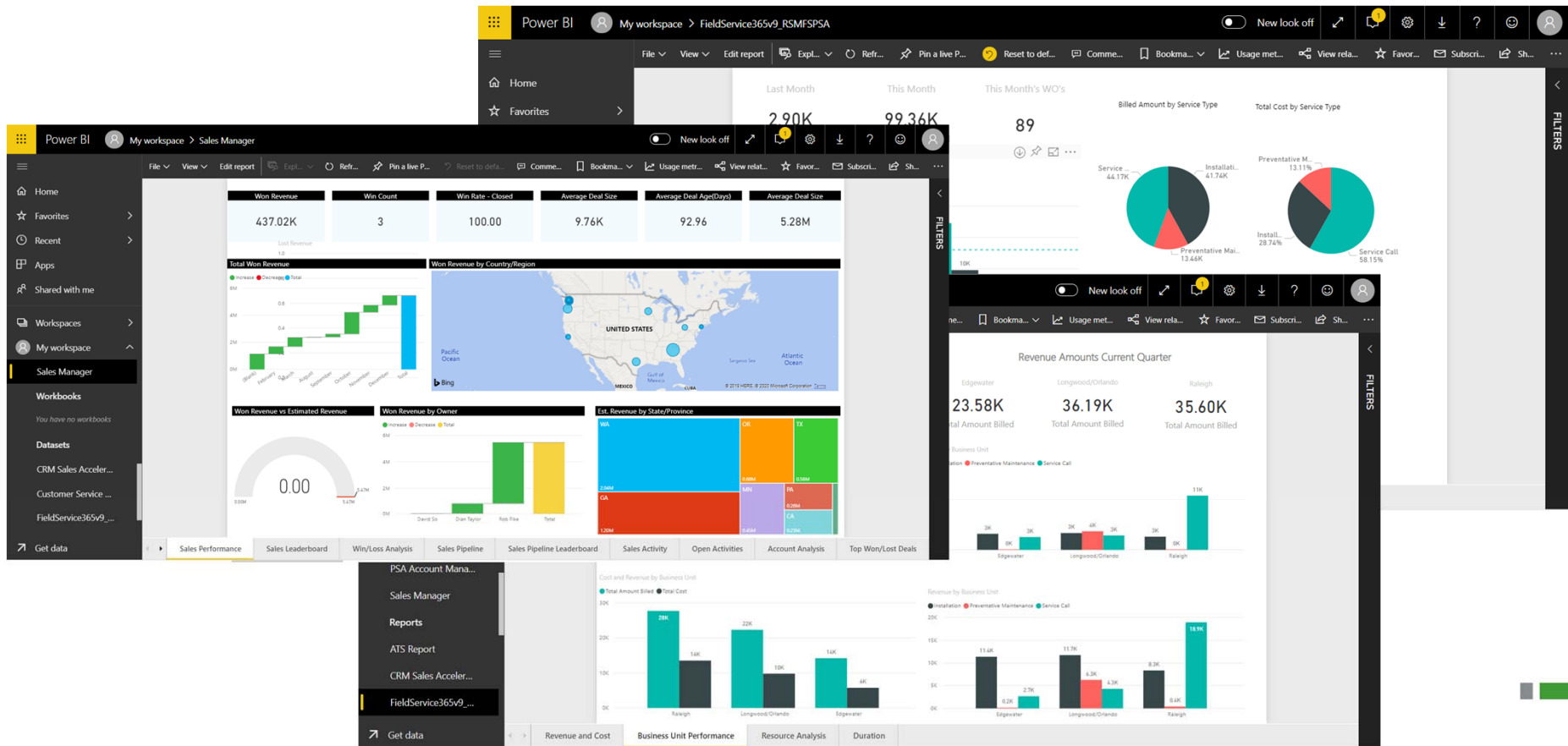
1.5 In the Customer group field, type a value.

1.6 In the Terms of payment field, enter or select a value.

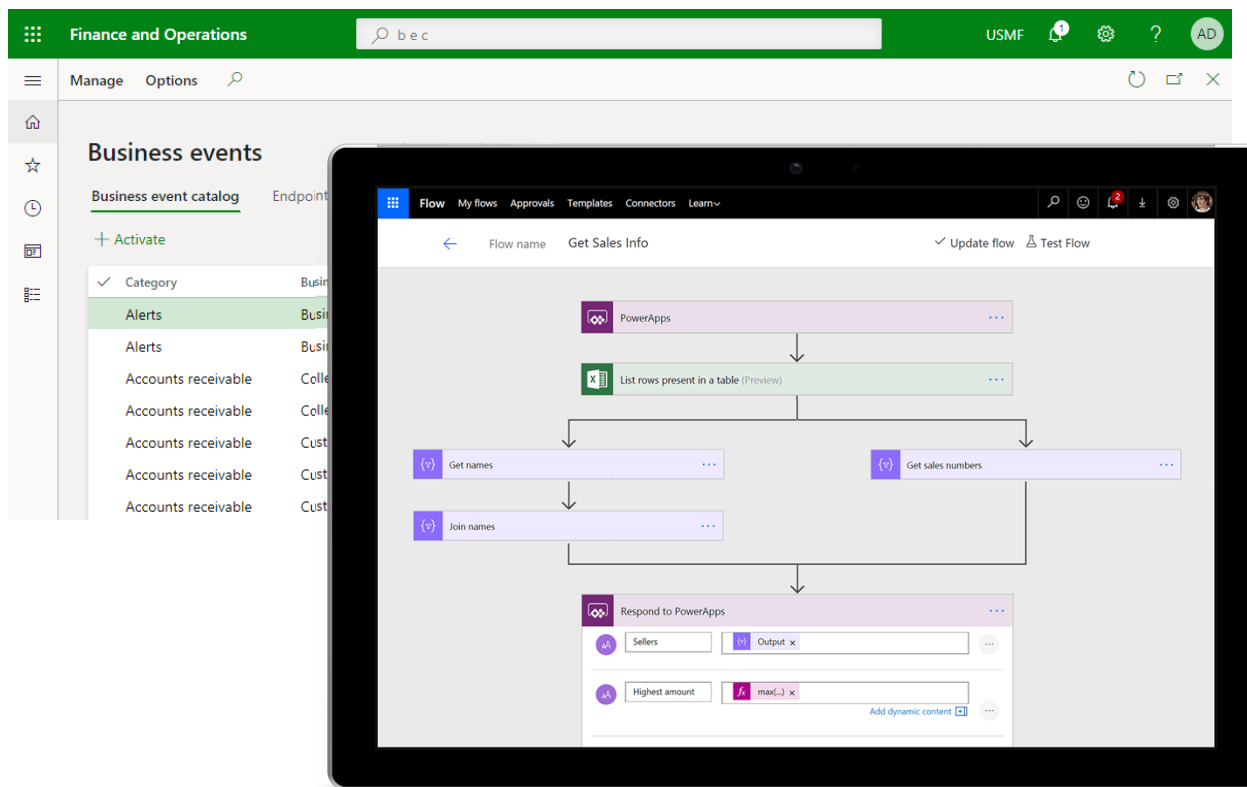
Stop task guide

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

Embedded Power BI / Analytics



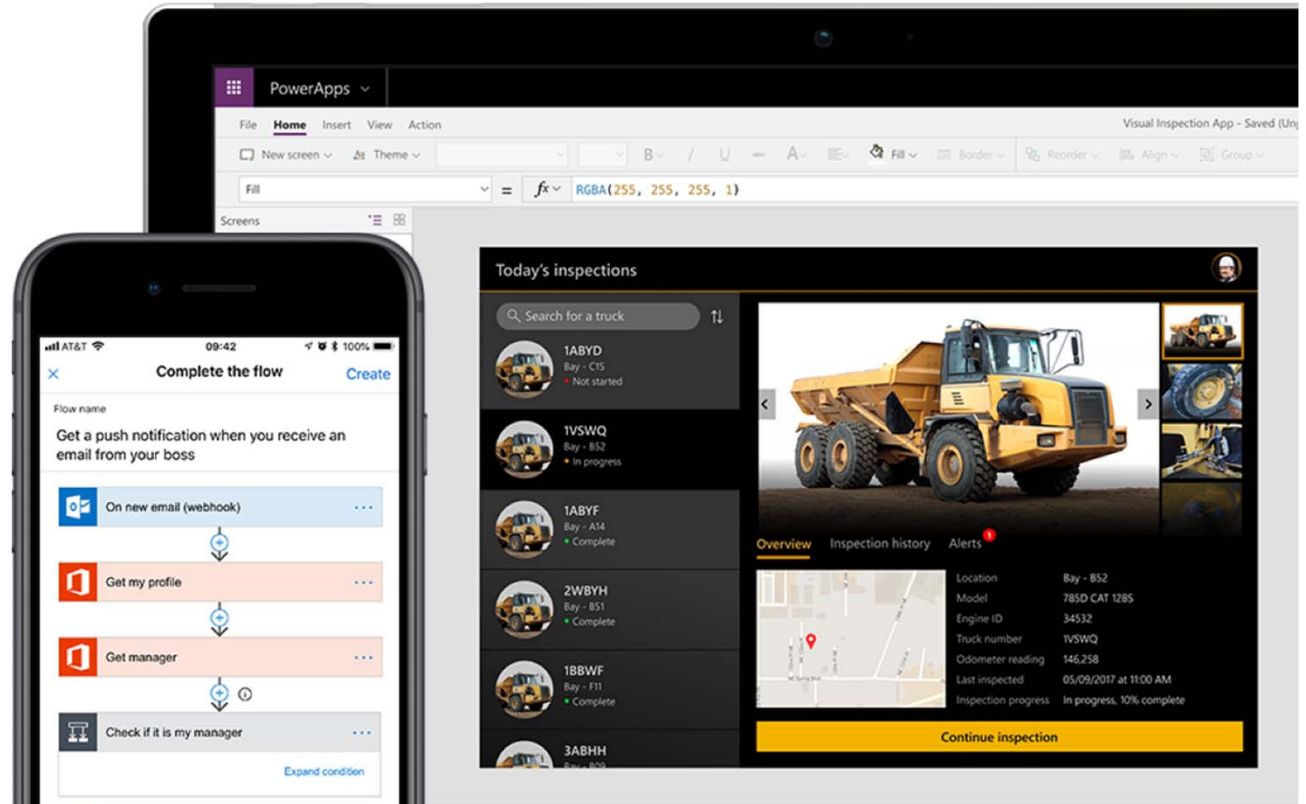
Business Events & Power Automate



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

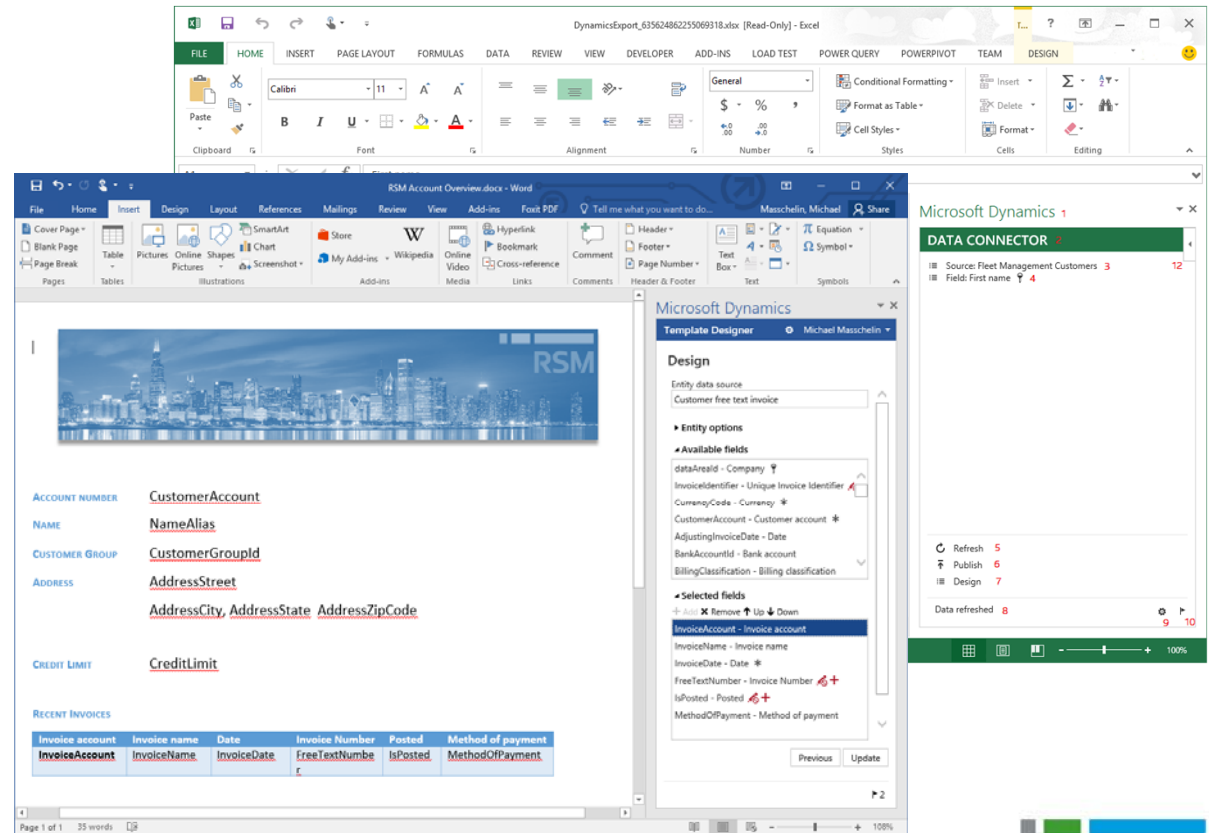
Embedded Power Apps Capability

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



Dynamics 365 Office Add-in

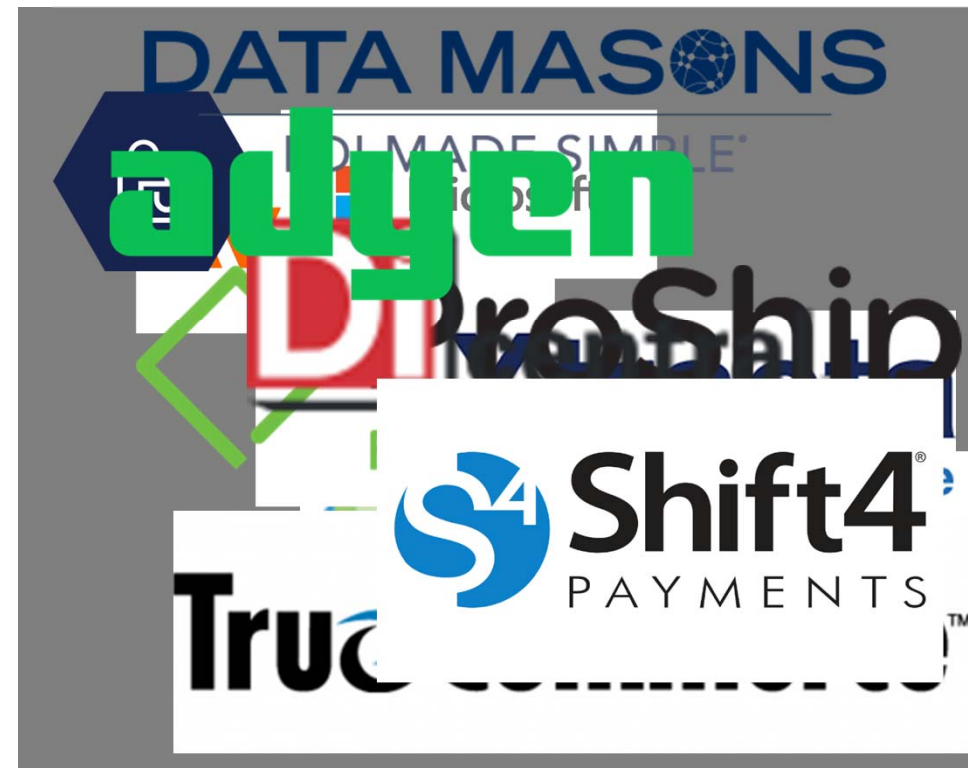
- Dynamics supports some of our favorite tools from Microsoft
- Odata Services on more than 2700 endpoints
- Connected spreadsheet with security
- Two-way connectivity allows editing in Excel



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 screenshot displays the Dynamics 365 app marketplace interface. At the top, there's a header for "Dynamics 365 Finance and Operations" with a 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." Below this is a link "Get Dynamics 365 Finance and Operations >".

Below the header, there are three tabs: "Finance & Operations", "Dynamics 365", and "Add-Ins". To the right, there's a "Reset category filters" link.

The main section shows "App results (425)" and "View consulting services (144)". Below this, there are five app cards:

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

In the top right corner, there's a preview of the Dynamics 365 Finance and Operations dashboard showing metrics like Revenue (1.75M), Expenses (1.80K), Gross margin (632.63K), and Gross Margin % (36.13%).

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 & 3rd Party Solutions
 - 75% of these solutions are consumed with core ERP
 - Cost savings on maintenance, minimize integrations

QUESTIONS AND ANSWERS



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