

# WHAT TO EXPECT WHEN MOVING GROUND TO CLOUD GP/NAV TO D365 BUSINESS CENTRAL



Presented by RSM US LLP

# Agenda

**Introductions**

**D365 Practice Overview**

**Planning for a Cloud Move**

**Options for Transitioning**

**Considerations**

**Next Steps**

**Q & A**

# Presenters



**Spencer Coulter**

Director

D365 Business Central

Delivery Team Lead



**Ben Knapper**

Manager

D365 Business Central

Application Development



**Jacey Charnoski**

Senior Associate

D365 Business Central

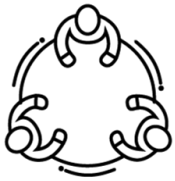
Application Development

# D365 BC PRACTICE OVERVIEW

# RSM Microsoft Dynamics 365 Practice

**30+**

Years  
Microsoft  
Partner



**2,000+**  
Dynamics  
Customers



**600+ Consultants**  
**Dynamics Practice**



2019/2020  
**INNERCIRCLE**  
*for Microsoft Business Applications*



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

**1,200+**

Microsoft  
Technology  
Consultants

**Microsoft  
Partner**



Gold Application Development  
Gold Cloud Platform  
Gold Cloud Productivity  
Gold Collaboration and Content  
Gold Datacenter  
Gold Enterprise Resource Planning  
Gold Small and Midmarket Cloud Solutions  
Silver Cloud Customer Relationship Management  
Silver Data Platform  
Silver Windows and Devices

# RSM Microsoft Dynamics Practice & Team

## Full Service Microsoft Solution Provider

### MICROSOFT SOLUTION AREAS:

#### Business Applications

Dynamics 365

- Finance
- Supply Chain
- Commerce
- Project Operations
- Sales
- Customer Service
- Field Service
- Marketing
- Human Resources
- Business Central
- Customer Data Platform

Dynamics AX  
Dynamics CRM  
Dynamics NAV, GP, SL

#### Data and AI

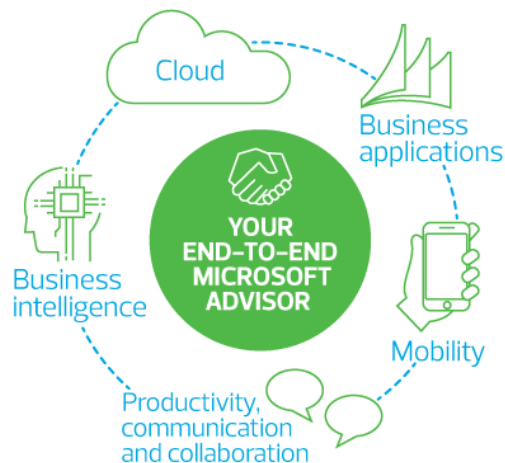
Power Platform

- Power Apps
- Power BI
- Power Automate
- Power Virtual Agents

Cortana Intelligence  
SQL  
SSRS

#### Apps and Infrastructure

Azure Stack  
Identity Management  
Azure Active Directory  
Federation



### FOCUS INDUSTRIES:

FOOD and BEVERAGE

RETAIL

CONSUMER  
PACKAGED  
GOODS

DISTRIBUTION

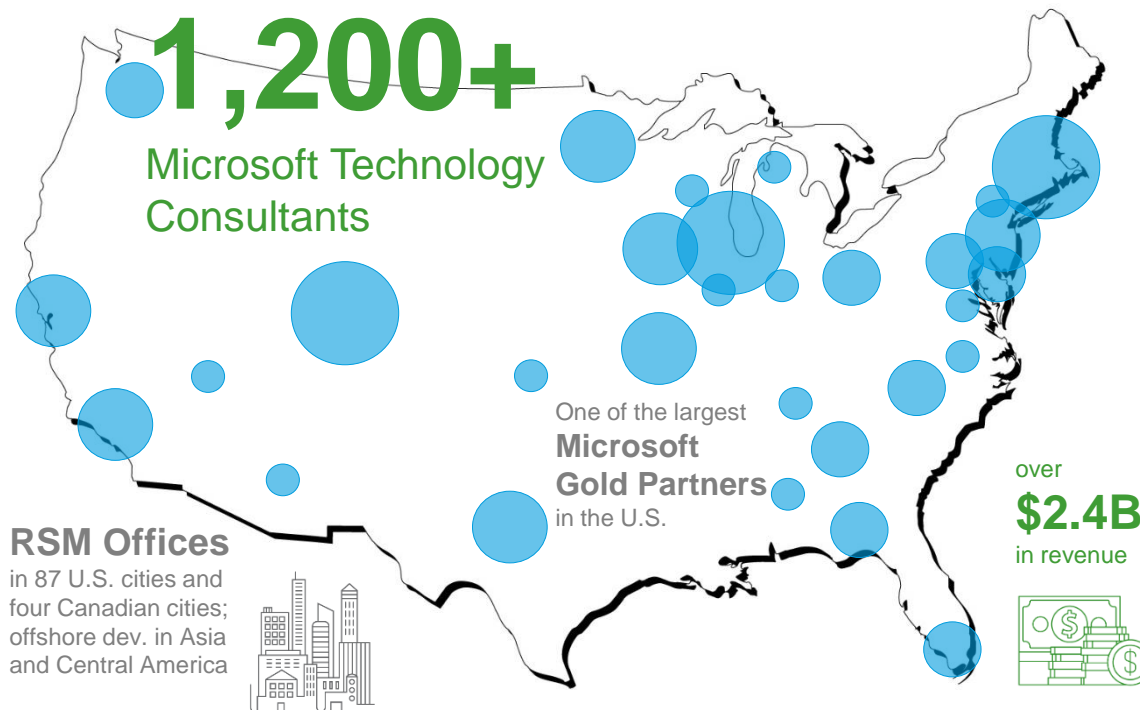
HEALTHCARE

LIFE SCIENCES

MANUFACTURING

NONPROFIT

PUBLIC SECTOR



LATITUDE 36 FOODS

Daisy BRAND

SAMPLE CLIENTS:  
Barletta BOATS

Outz BRANDS

CAMPBELL SCIENTIFIC

Driscoll's

SMEAD

KEEPING YOU ORGANIZED®

VGM FULFILLMENT

Taylor FARMS

Chateau St. Michelle

BOSTON Rotisserie Kitchen MARKET

HEARTLAND

goodpop

PSSI

# Dynamics 365

## Employee Productivity



OneNote



Outlook



PowerPoint

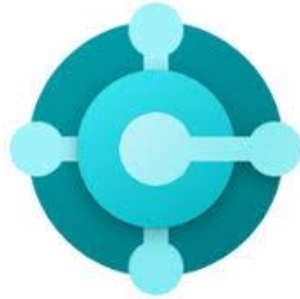


Excel



Word

## Dynamics 365 ERP



## Communication and Collaboration



Teams



Project



OneNote



Skype

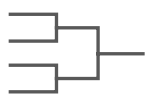


SharePoint

## Other Dynamics 365 Apps



Customer  
Service



Project  
Operations

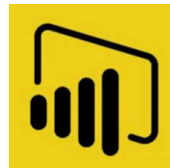


Field  
Service



Sales  
CRM

## Power Platform



Power BI



Power Automate



Power Apps

## Dataverse



Formerly Common  
Data Service

## Accelerators / Extensions / Partners



RSM IP



Appsource

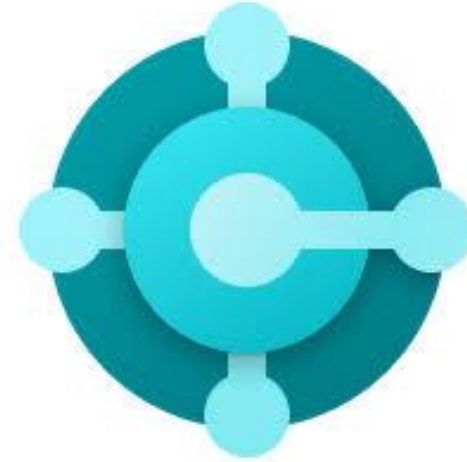


Trusted  
Partners

# D365 BC Solution Origin



Microsoft Dynamics  
NAV



Microsoft Dynamics  
365 Business Central

Microsoft's Largest Business Application Customer Base:

- 200,000+ Customers
- 2,400,000+ Licensed Users
- 3,500 Partners Worldwide
- 40+ Localizations
- Utilized in over 140+ Countries



# Dynamics 365 Business Central Licensing Model – Named Users

Full Users With  
Access To  
All Functions.  
Subject To Client  
Security  
Requirements.

## **Essentials License**

**\$70 PU/PM**



Financial Management

Financial  
Reporting,  
GL, AP & AR

Banking / Cash  
Management

Fixed Asset  
Management

Multi-Entity /  
Multi-Company  
/ Intercompany



Sales Management

Quote &  
Opportunity  
Management

Contact  
Management

Sales Orders &  
Invoicing

Payment  
Processing



Purchasing

Procurement

Inventory  
Purchase  
Planning

Purchase Order  
Management

Vendor  
Management



Inventory Management

Multi-Location

Assembly /  
Kitting

Warehouse  
Management /  
Physical Count

Serial & Lot  
Control



Project Management

Budgeting &  
Estimates

Time Sheets

Capacity  
Planning

Work-In-  
Process  
Management



Production

BOM's,  
Routings &  
Work Centers

Production  
Orders

Master  
Planning

Subcontractors



Service Management

Service  
Orders

Dispatch

Warranty  
Management

Preventative  
Maintenance

## **Team License**

Enables Screen  
Inquiry and Report  
Viewing, Workflow  
Approvals and Time  
Entry.

Disables New  
Master and  
Transactional  
Record Entry.

**\$8 PU/PM**

## **Device License**

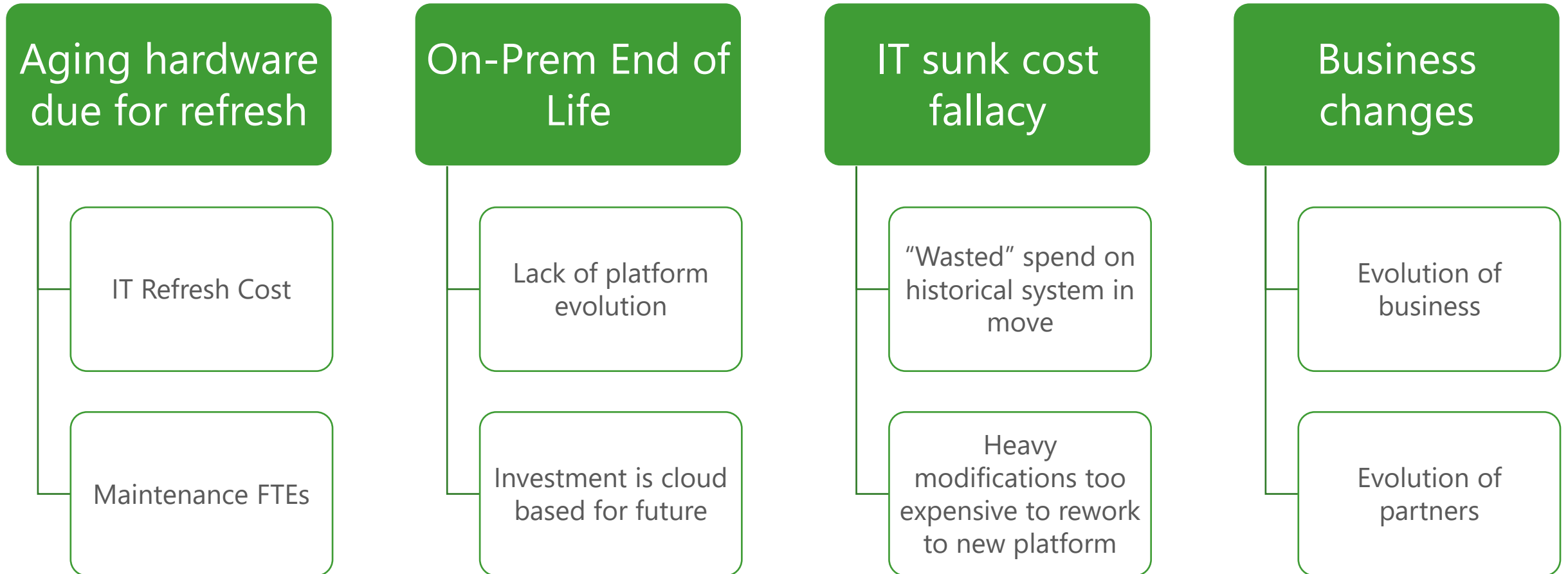
Concurrent license  
focused on inventory  
and production  
activities

**\$40 PM**



# WHY GO TO THE CLOUD?

# Drivers for migration to the cloud



# Dynamics 365 Continuous Updates

## April

- US roughly 20 days later
- 90 day upgrade window managed by YOU
- Documentation ~3 months in advance
- Early access via included Sandbox(s)

## ~Monthly

- Minor releases
- 30 day upgrade window managed by YOU
- Non-breaking
- Early access via included Sandbox(s)

## October

- US roughly 20 days later
- 90 day upgrade window managed by YOU
- Documentation ~3 months in advance
- Early access via included Sandbox(s)

## ~Monthly

- Minor releases
- 30 day upgrade window managed by YOU
- Non-breaking
- Early access via included Sandbox(s)

# CLOUD MIGRATION CONSIDERATIONS

# Considerations

## Platform

Other tools in use (CRM, Expense Mgmt, eCommerce, WMS, CPM, etc)

- Current add-on capabilities – revisit if meeting the need or accepted pain
- Integration architecture – Can it be better?

## Virtual

- Data Warehouse – Review and define structure / need
- Interaction speed – How quickly does a process need to occur

## Physical

- Printing automation
- Labels - efficiency
- Handheld devices – data volumes

# Environment Scale



## Data Migration

What do I need to bring forward to properly manage my business?

How much do we access or review history to make decisions?



## Environment Size

How much space do I need in the cloud environment to support my business?



## Environment Scaling

How quickly do I add records to this environment?

How many orders are we entering a month?

How many attachments do we require per transaction?



## Record Generation

How is data getting into the system?

Can I make my business more effective with data input automation?

Where is data automated today?

# Environment Customizations

## Keep or Replace

- Are there processes running today that are no longer necessary?
- Are there things we do that we could tweak slightly to be more standardized

## Base Code

- Can we remove customizations that are base product functions now?
- Do we use all of our customizations?

## Extensions

- How much code needs to be re-engineered?

## Add on Products (ISV's)

- What other bills am I paying related to our current systems?
- What do all of my IT tools do for my business?
- Are we getting enough benefit from our tools to cover their cost to the organization?

## Integrations

- Do we have tools directly connected to our system?
- How are systems integrated (or not) today?
- What other tools should be integrated and considered for the future?





# Value Proposition

## Business Evolution

- Does our business still look like the business that implemented our current platform?
- Are we still using all the functions of the system we are paying for?
- Do we have outdated processes in place that we do because "that's how we do this process"?
- Has our business evolved in a way that can shrink our data needing to come into the new system?
- What does this business look like XX years from now and how can software support that evolution?

## Opportunity

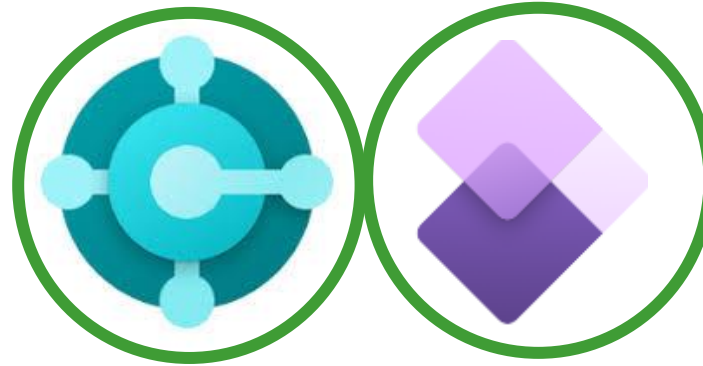
- What are the biggest pain points we have with software as an organization?
- What tools do we have that require double entry or store data that isn't accessible across the organization today?

# Dynamics 365

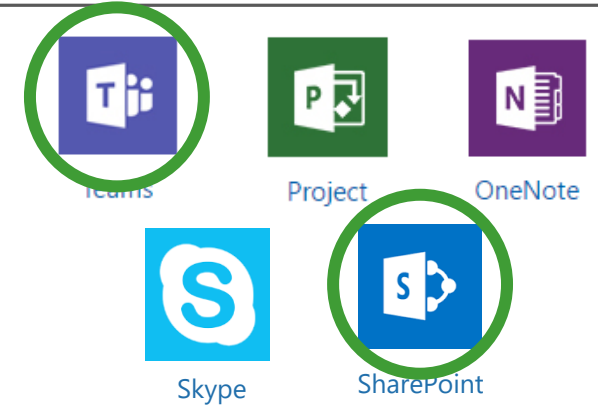
## Employee Productivity



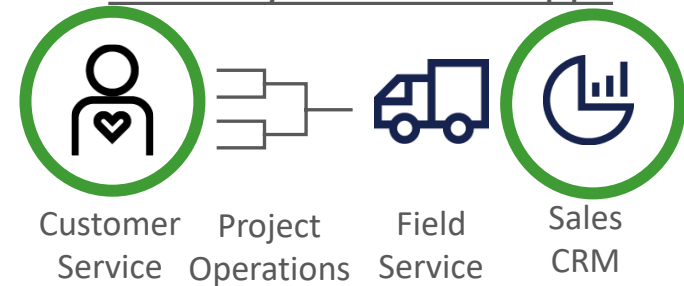
## Dynamics 365 Business Central ERP



## Communication and Collaboration



## Other Dynamics 365 Apps



## Power Platform



## Dataverse



## Accelerators / Extensions / Partners



# OPTIONS FOR TRANSITIONING

# What are the options?

## Upgrade

- Cloud Migration
- Ground to Cloud

## Implementation

- Re-implement into the Cloud

# Microsoft Cloud Migration

- GP 2015 or later
  - GL, AR, AP, Items, Open Bank
  - Historical documents loaded to separate extension fields for visibility but not loaded to base table
- Business Central on prem
  - Nearly all tables included (including matching extensions)
  - Older versions of Dynamics NAV require more hops

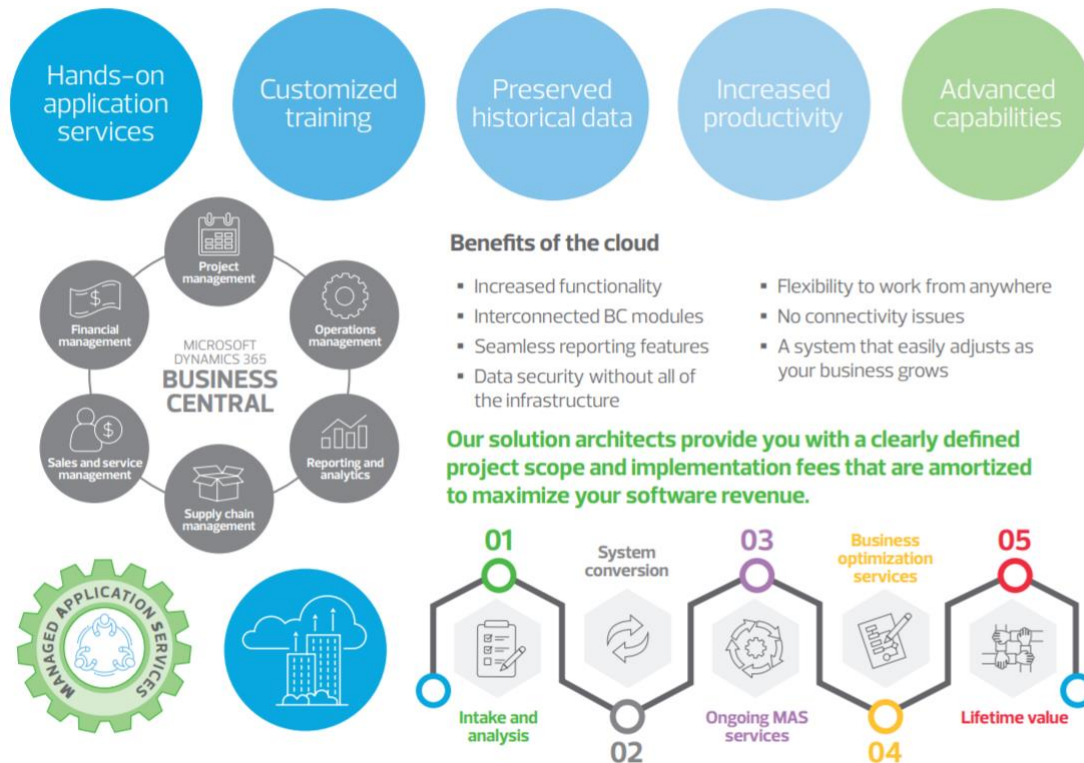


# RSM Ground to Cloud

**AUTOMATE YOUR SYSTEM'S UPGRADE.  
SIMPLIFY YOUR DAILY WORK.**

**A partner with you every step of the way**

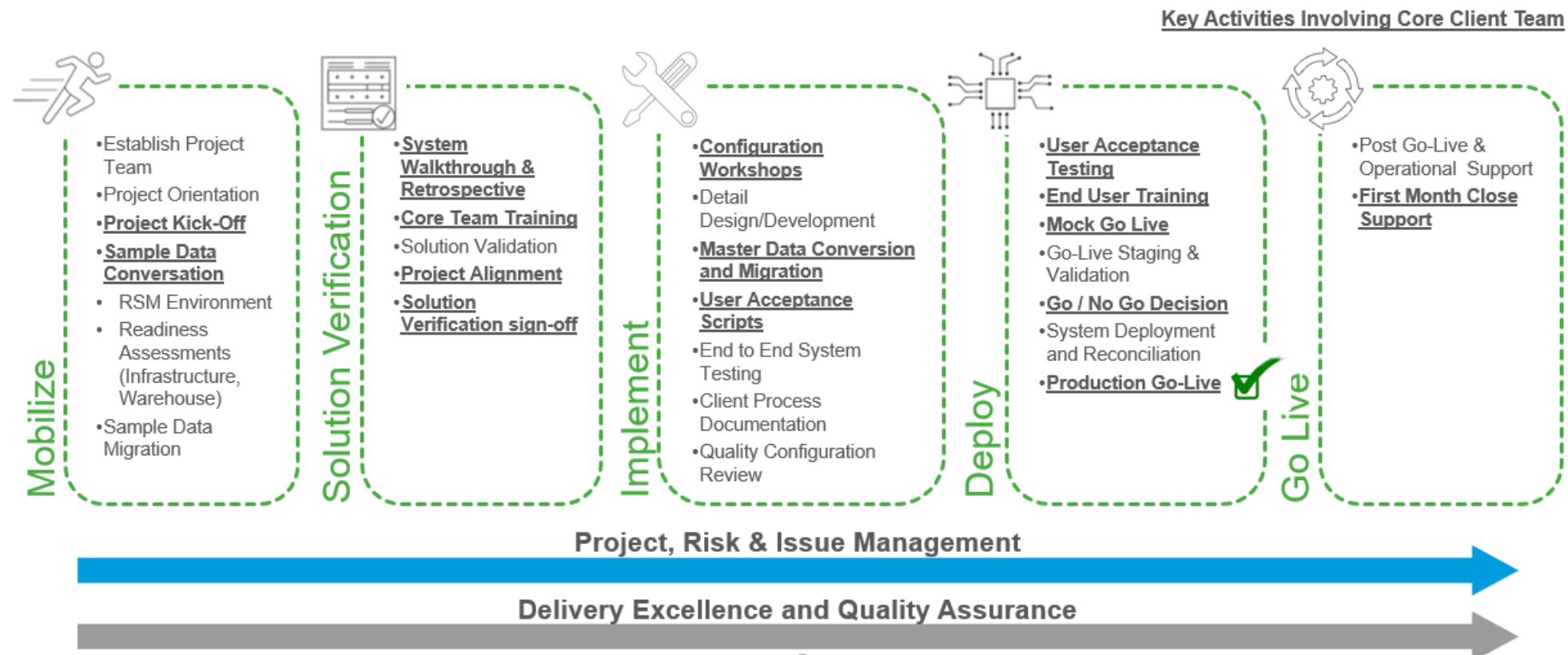
Use RSM's new ground-to-cloud system upgrade tool to take your business to new heights



- GP to BC – Rapid time to value
- Includes all history and conversion to Dimensional accounting
- Currently covers GL, Purchasing, Sales, Bank modules
- Future state to include inventory, production, and ISV's

# Re-Implementation

- Best for older, heavily customized environments
- Refresh all activities and ensure able to fully take advantage of updated functionality
- Generally, most “expensive” option



# CLIENT EXAMPLE



# Client Example



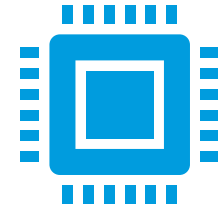
## Background

Old NAV environment with significant volume of customization  
Hardware and recurring software sales based organization  
Struggles maintaining current environment



## Decision Making

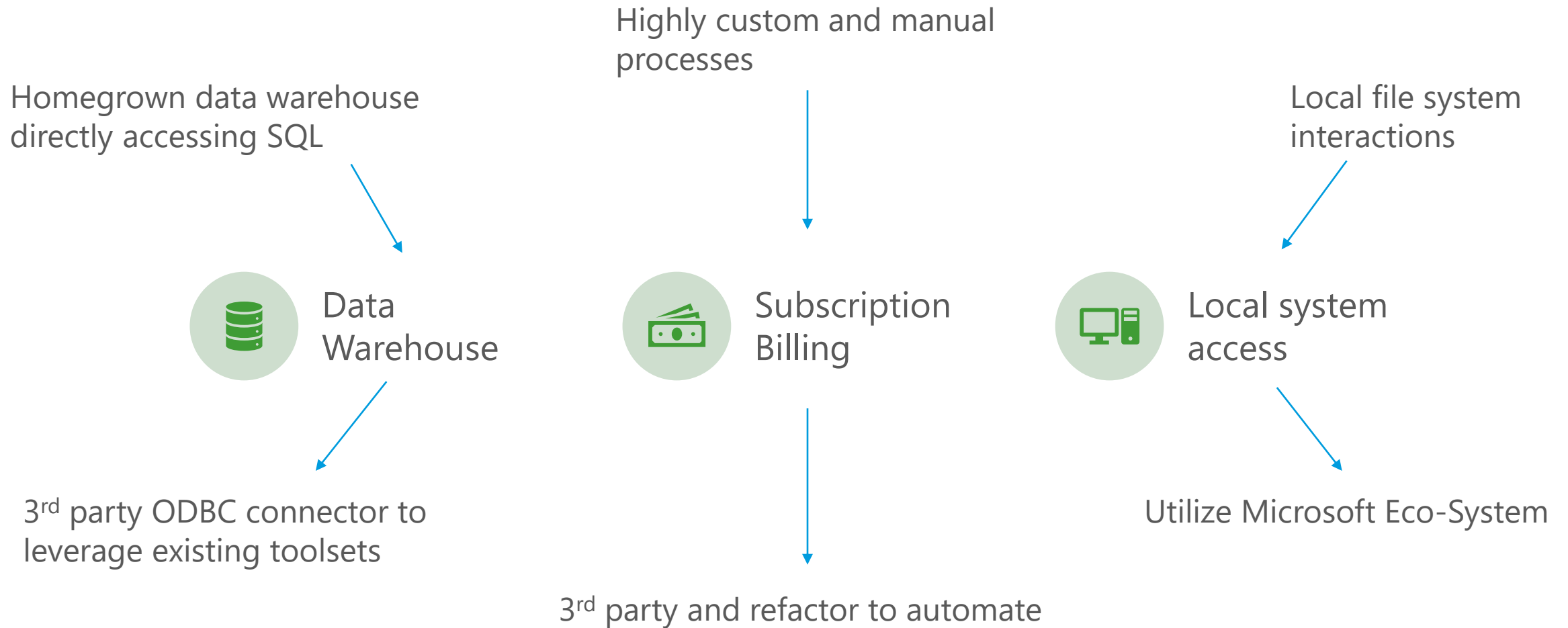
Review of existing code  
Conversation on changes to business process



## Resolution

Over-customized and unable to distinguish needed vs un-needed code  
ISV's offered coverage in SaaS for existing custom processes  
Opted to fully re-implement and force business units to re-buy into customizations

# Re-Implementation



WHAT'S NEXT?

# Are you interested in a readiness assessment?

## Assessment Objectives:

- Document and review operations for:
  - Processes, volumes and flows
  - Current system interfaces and directives
  - Volume of modifications
  - Validation of approach
  - Quality and accuracy
  - Risk mitigation



Contact Matt Wagner ([matt.wagner@rsmus.com](mailto:matt.wagner@rsmus.com)) to book yours today!

# Are you interested in a demo?

## Demo opportunities:

- Discovery session – Optimize a demo for you!
- Initial budget detail provided
- Demo business processes in Cloud D365 BC



Contact Matt Wagner ([matt.wagner@rsmus.com](mailto:matt.wagner@rsmus.com)) to book yours today!

# Supporting Information



- [Experience.Dynamics.com](https://Experience.Dynamics.com)



- Spring 2022 BC release



[matt.wagner@rsmus.com](mailto:matt.wagner@rsmus.com)

# 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](https://rsmus.com/aboutus) for more information regarding RSM US LLP and RSM International.

RSM, the RSM logo and *the power of being understood* are registered trademarks of RSM International Association.

© 2020 RSM US LLP. All Rights Reserved.

