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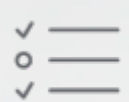


Business Technology Solutions

What's the Difference? Microsoft Dynamics 365 Business Central vs. Finance & Supply Chain Management

June 20, 2023

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Please use the Questions feature to ask questions



All attendees will remain muted



**You will receive a copy of the slides & recording.
Watch for an email with the link**



**Please take a few moments to complete our survey
at the end of the webinar**

About FORVIS

Services

- Assurance
- Tax
- Advisory

FORVIS, LLP ranks among the nation's top 10 public accounting firms, helping unlock the potential of our clients, people, and communities. We deliver an **Unmatched Client Experience™** with assurance, tax, and advisory services that reflect our exceptional capabilities and uncommon commitment to excellence. Discover how our forward vision can help you prepare for what's next.

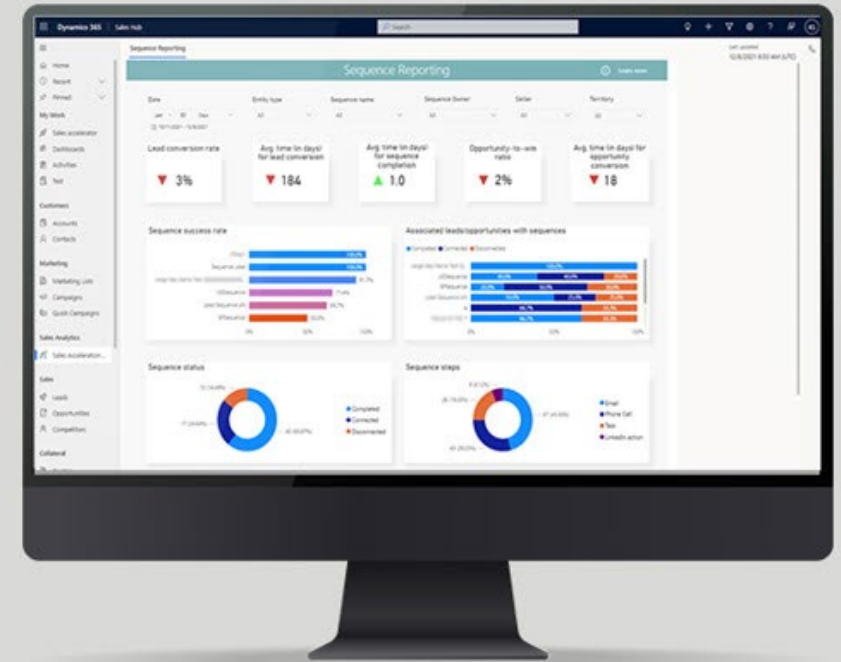
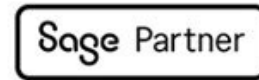


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Business Technology Solutions

FORVIS' Business Technology Solutions can help support digital transformation across your organization with enterprise resource planning (ERP) and customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, and support services.

2022/2023
INNERCIRCLE
for Microsoft Business Applications



**From sales forecasting to financial reporting,
learn what CRM and ERP technologies can do.**

Meet the Presenters



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Objectives

- Explain how Dynamics 365 Business Central & Dynamics 365 Finance/Supply Chain Management can help manage business finances
- Describe how Dynamics 365 Business Central & Dynamics 365 Finance/Supply Chain Management can help improve operations management
- Identify how these two ERP applications differ regarding company size, industry focus, & key features



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Agenda

- FORVIS Overview
- Microsoft Dynamics ERP Overview & Evolution
- Business Central: Key Considerations, Features, Fit
- Finance/Supply Chain Management: Key Considerations, Features, Fit
- Planning for Your Next ERP Project
- Q&A

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Gold
Microsoft
Partner



2022/2023
INNERCIRCLE
for Microsoft Business Applications



Business Technology Solutions

Goal

Uncover & understand your
business challenges &
recommend transformational
strategies

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Core Application & Services



Insights & Automation



Microsoft Dynamics CRM



Microsoft Dynamics ERP



Sage



Salesforce



NetSuite

By the Numbers

1000+
Successful Implementations

20+
Years Microsoft
Dynamics AX/365 Partner

15+
Years Microsoft Dynamics 365
Customer Engagement Partner

150+
Dedicated Resources

10+
Years Legacy
Salesforce Partner

10+
Years Marketing
Consulting Services

1 Dedicated Practice to Microsoft Power Platform

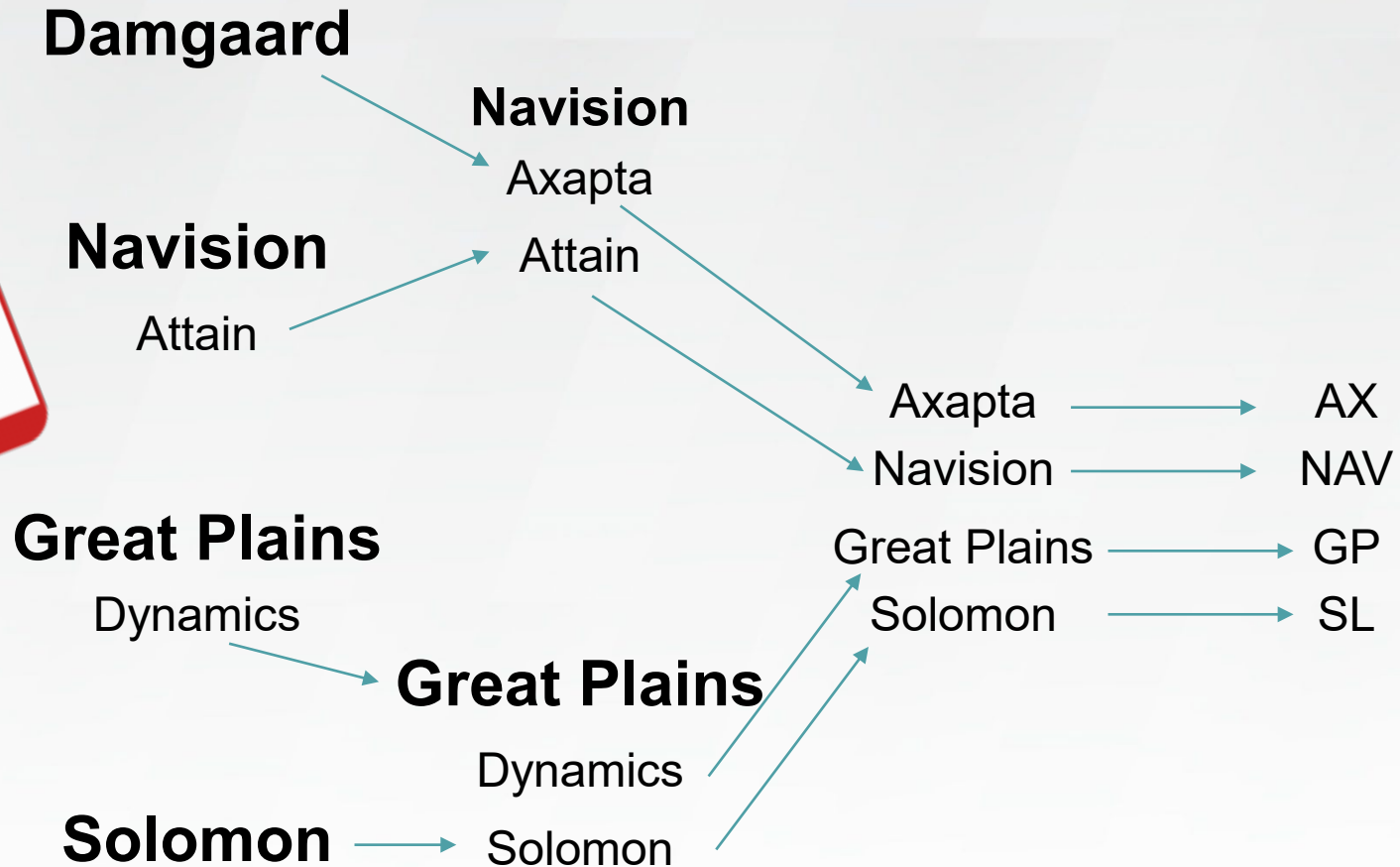
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What Is ERP?

ERP is software that can help you streamline & manage activities, such as

- Accounting
- Procurement
- Project management
- Risk management
- Supply chain
- Resource management
- Human resources

A Walk Down Memory Lane ...



Dynamics 365

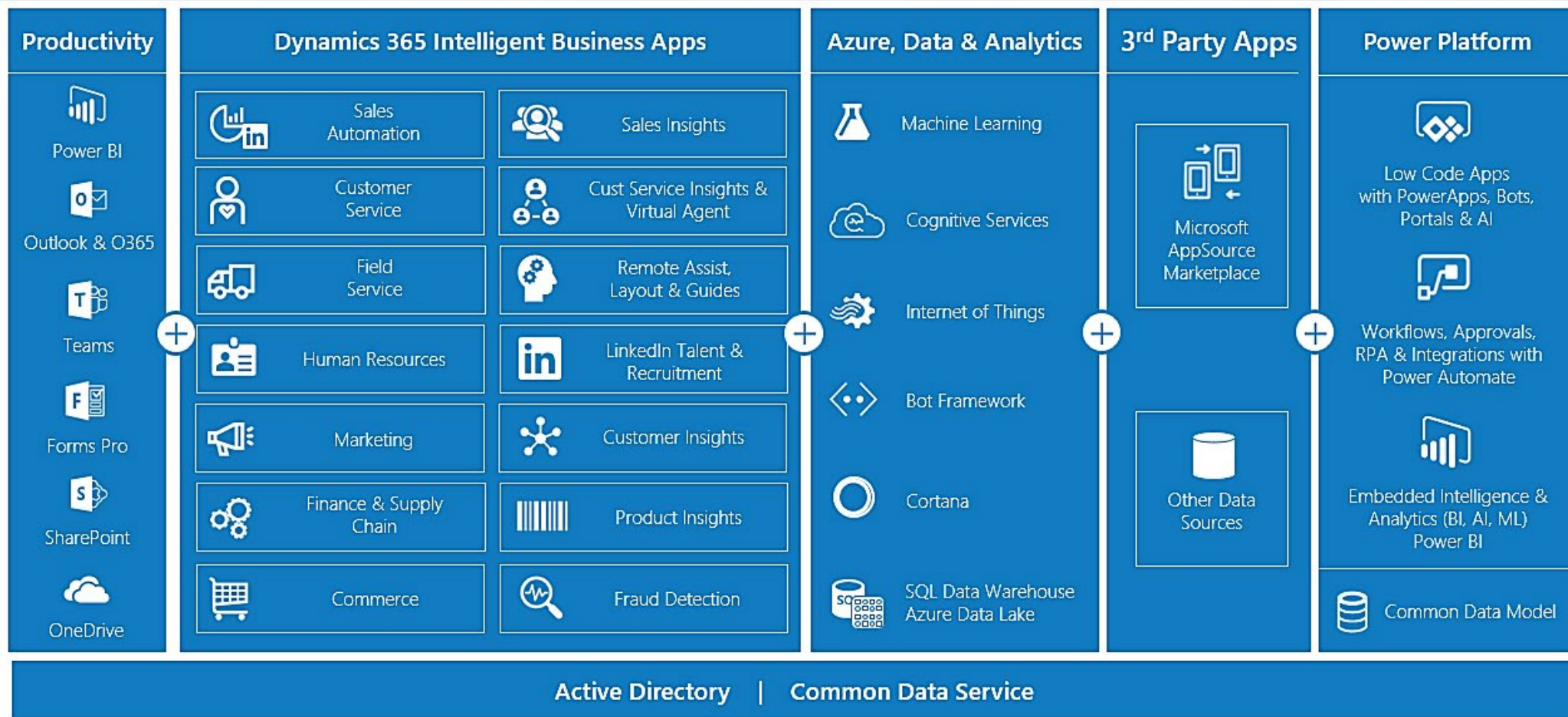
Finance/Supply Chain Management Business Central



Microsoft Dynamics 365 Business Central

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Microsoft – The Big Picture



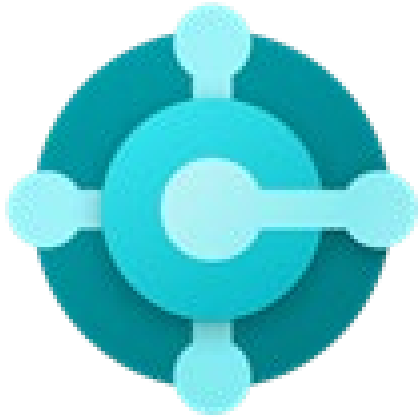
Microsoft Dynamics at a Glance

Leverages the full Microsoft technology stack

- Azure & Cloud
- Security
- Administration
- Seamless interoperability
- Microsoft Professional

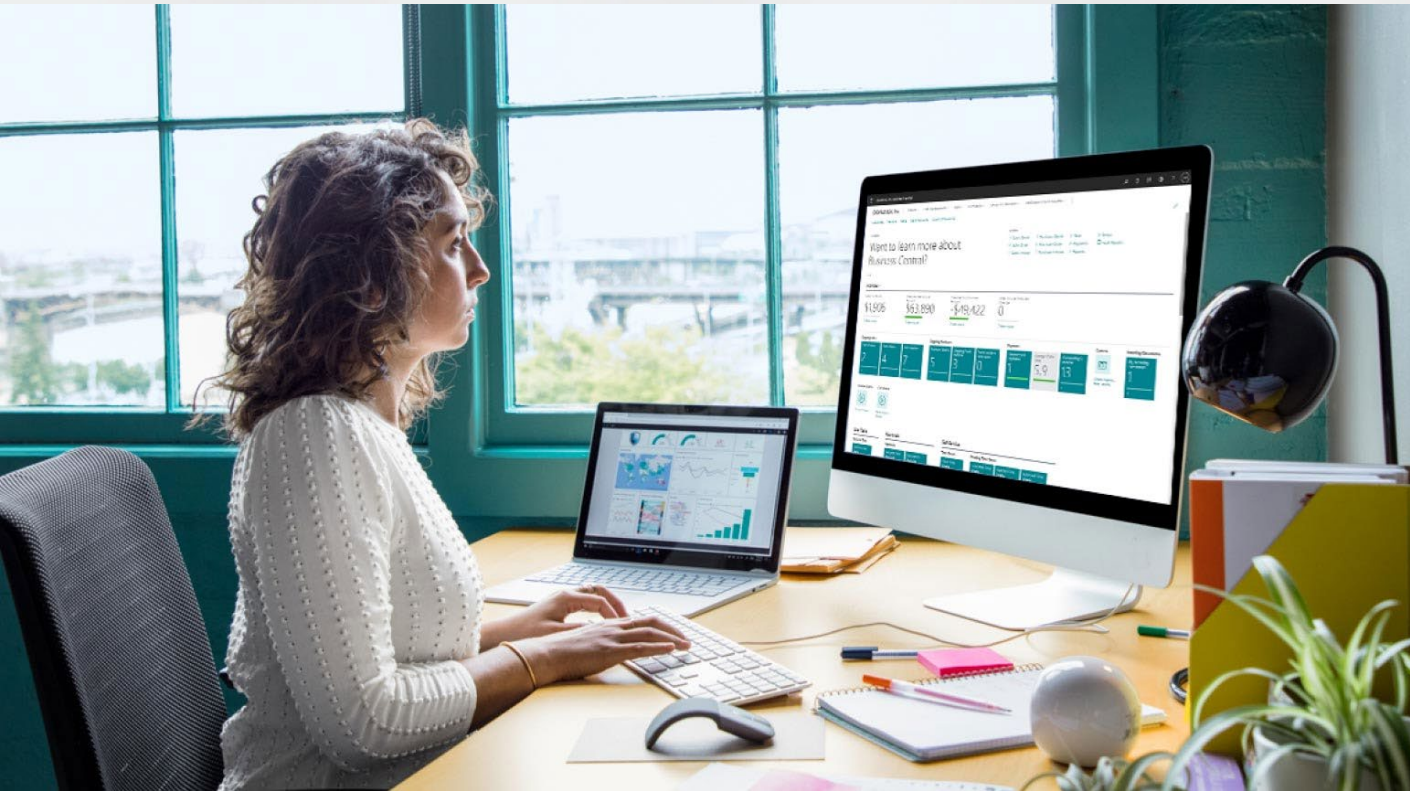


Business Central



What Microsoft Says

Connect operations across your small or midsize business



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“Move to the cloud faster with flexible deployment and security. Connect sales, service, finance, and operations to work smarter and adapt faster.”

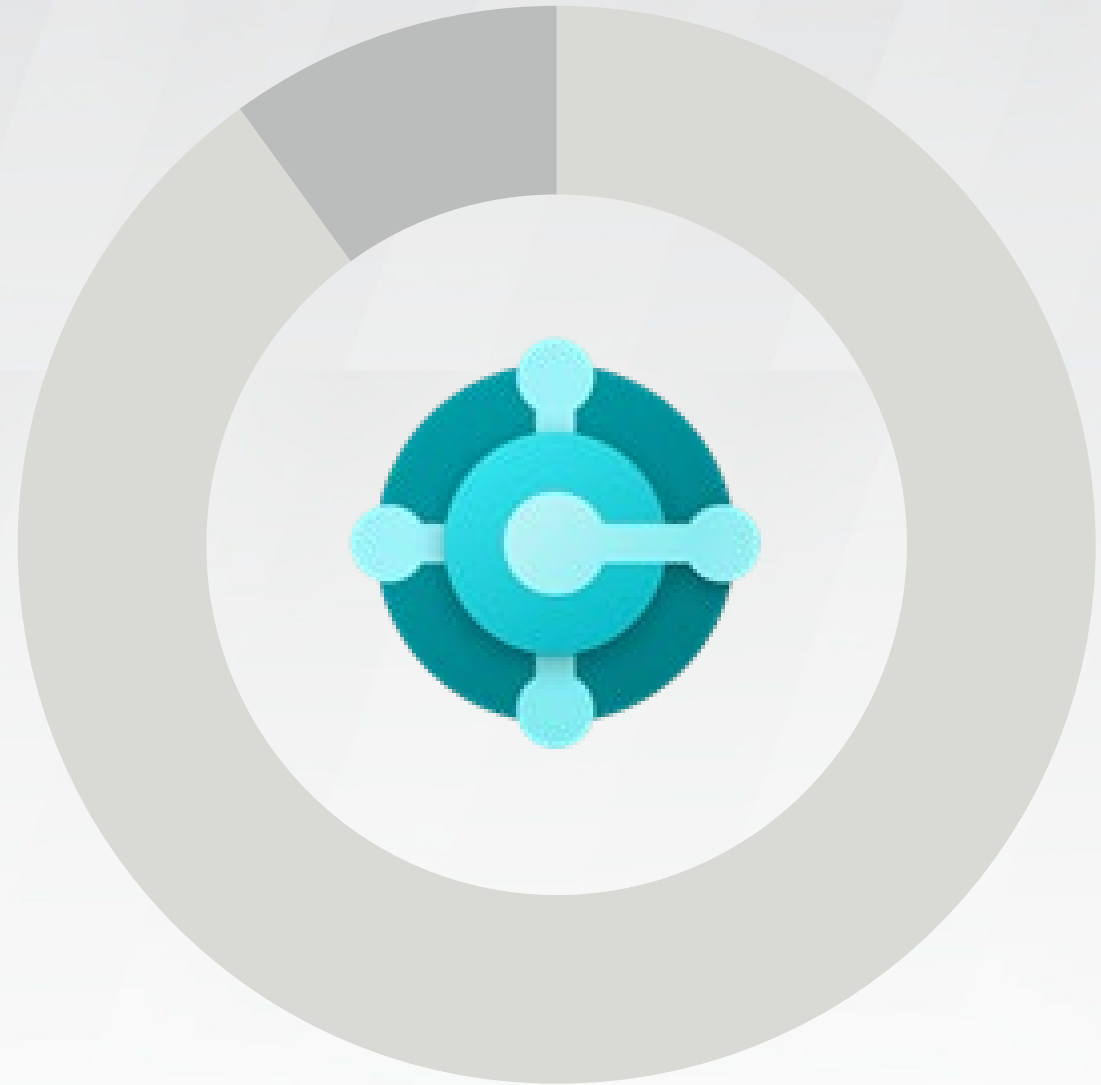
– Microsoft Business Central



What Microsoft Says

More than 90% of the world's businesses are SMBs, & they're looking for ways to disrupt markets & outpace competitors. Led by trailblazing, fast-paced business leaders who need to solve tough problems yesterday. Business Central can help them work smarter & adapt faster

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“65% of CFOs say that standardizing and automating processes and building agility and quality into processes are significant priorities.” – Microsoft

Considerations, Features, Fit



Business Central

Microsoft's all-in-one cloud-based ERP solution designed for small & medium-sized businesses. BC is a rebrand of NAV (Navision) first introduced in mid-1990s

GP (Great Plains)

Microsoft's more accounting-based ERP solution for small & medium-sized businesses. Introduced in the early 1980s. Being phased out per Microsoft's recent [GP licensing announcement](#)

Target Market

Serving businesses from \$10M – Low Hundreds in a wide range of industries (heavy in manufacturing, distribution, healthcare, NFP, professional services)

Basic/Standard implementation ~ 4–6 months (core financials + module/ISV)

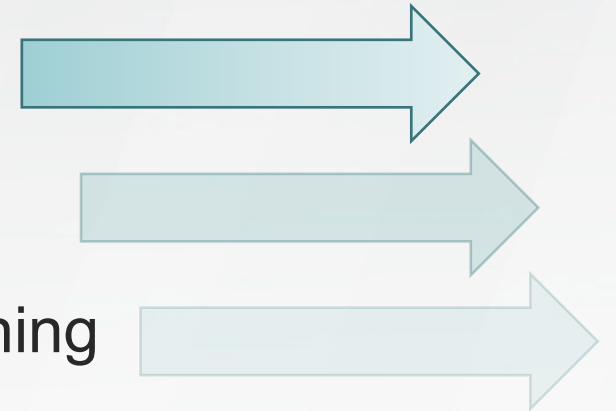
Full implementation ~ 6–12 months (standard + manufacturing + ISVs)

Considerations, Features, Fit



If your top challenges include

- Razor-thin profit margins
- Information silos
- Multiple, separate systems
- Inefficient manual processes
- Ineffective production resource scheduling & material planning
- Challenging inventory & warehousing management
- Market competition



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Considerations, Features, Fit



Here are ways Business Central can help you



Work Smarter

- **The easy-to-use interface** can help your team adopt new processes quickly
- **Streamline quote to cash**, all within Outlook in Microsoft 365—without switching applications
- Set up customers or vendors, create quotes, process orders, & submit invoices **without leaving your inbox**
- [Easily export data into Excel](#) to analyze & update, then write back into Business Central
- Create outgoing documents in Word using your **business data**

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Adapt Faster

- **Deploy in weeks, not years**
- **Get operational choice** with multiple deployment options & the ability to run on desktop, tablet, or mobile
- **Break down information silos.** Deploy a single solution to manage your finance, sales, services, & operations
- **Adapt to anything** with the freedom to tackle market condition changes as well as new priorities & opportunities as they emerge

Considerations, Features, Fit



- No minimum user count
- Highly configurable & ready to scale
- Consider the trajectory of your business three to five years out
 - Revenues
 - Complexity
- Budget
 - Standard Business Central implementations ~ \$75K minimum
 - Larger/more complex implementations ~ \$150K minimum
- Choose the right partner
 - Expertise in your industry
 - Configuration – yes; Customization – last resort
 - Proven ISVs who follow the rules

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Finance/ Supply Chain Management



What Microsoft Says

Enhance financial visibility & profitability



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“Enhance your financial decision making. Improve your business health. Drive agility and growth using financial reporting, embedded analytics, and AI-driven insights.”

– Microsoft Finance



What Microsoft Says

- Increased finance productivity by 20%
- 60% ROI & 20-month payback with Dynamics 365 Finance & Dynamics 365 Supply Chain Management (Forrester)

Productivity

20

ROI

60



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FINANCIAL MANAGEMENT

- General ledger
- Accounts receivable and payable
- Bank management
- Budget control
- Share service support
- Compliance management



BUSINESS INTELLIGENCE & REPORTING

- Standard ad hoc and analytical reports with Microsoft SQL Server Reporting Services
- Role-tailored, predefined, multidimensional data cubes
- Dashboard views of key performance indicators

- Material and capacity planning
- Resource management
- Job scheduling and sequencing
- Product configuration
- Shop floor management

PRODUCTION



- Inventory management
- Multisite warehouse management
- Trade agreements
- Order promising
- Distribution planning
- Quality management

SUPPLY CHAIN MANAGEMENT



HUMAN CAPITAL MANAGEMENT

- Organizational and workforce management
- Recruitment and selection
- Development, training and performance management
- Employee self-service portal



SALES & MARKETING

- Sales force and marketing automation
- Lead and opportunity management
- Sales management
- Microsoft Dynamics CRM Connector

- Project accounting and invoicing
- Project cost control
- Work breakdown structures
- Integration with Microsoft project

PROJECT MANAGEMENT & ACCOUNTING



- Direct and indirect procurement
- Purchase requisitions
- Supplier relationship management
- Vendor self-service portal

PROCUREMENT AND SOURCING



SERVICE MANAGEMENT

- Service orders and contracts
- Service calls and dispatching
- Repair management
- Service subscription

Considerations, Features, Fit



- **Financials**

- Advanced Budgeting & Forecasting
- Multi-Currency
- Project Management & Accounting

- **Manufacturing**

- Process Manufacturing
- Plant Asset Management
- Multi-Site Planning

- **Supply Chain & Operations**

- Advanced Warehouse Management
- Quality Management
- Transportation Planning

- **Vendor Management**

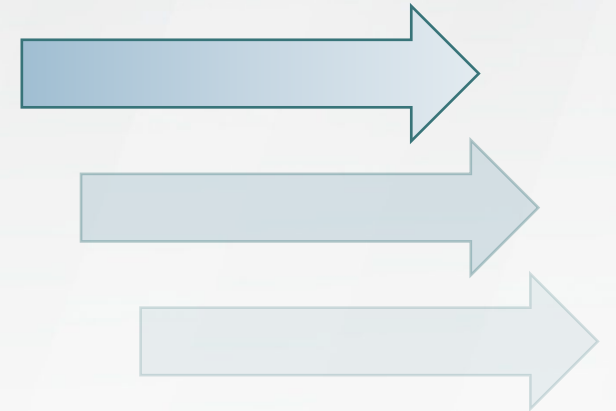
- Supplier Performance
- Advanced Pricing, Trade Agreements, Rebates

Considerations, Features, Fit



If your top challenges include

- A business need for SaaS, cloud-based technology, modern workspace, & transformation
- Dissatisfaction with current ERP solution
- Lack of visibility into the operations & finances
- Mid-market growth (\$250M–\$5B)
- A need for increased data security, risk management, & compliance
- Fragmented data that hinders your ability to make strategic decisions quickly



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Considerations, Features, Fit



Here are ways Dynamics 365 Finance/Supply Chain can help you



Gain Visibility

- The system can provide **real-time visibility** into operations & financial performance
- Embedded analytics & built-in dashboards for graphic visualizations, including drill-down ability, can be used to **turn data into action**
- Increased visibility can help you **reduce costs** by spotlighting areas for improvement & prevention

“70% of companies are focusing on improving supply chain visibility.” – Gartner & Microsoft

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Accelerate Reporting

- Use centralized data (all your data plugged into one place) & AI to **automate & accelerate reporting**
- Easily manage & comply with frequently changing **regulatory requirements**, by providing automated system updates for regulatory & tax reports, e-invoices, & payments
- Real-time reporting capabilities can help leadership teams make informed decisions swiftly, e.g., if a company is experiencing a cash flow issue, real-time reporting tools in Dynamics 365 Finance can quickly identify the cause
- This ERP system also can help ESG reporting, from identifying emissions sources in the supply chain to data consolidation

Considerations, Features, Fit



- 20 user minimum
- Consider the trajectory of your business three to five years out
 - Revenues
 - Complexity
- Budget
 - Finance Implementations ~ \$450K minimum
 - Finance & Supply Chain Management ~ \$850K minimum
- Choose the right partner
 - Expertise in your industry
 - Configuration – yes; Customization – last resort
 - Proven ISVs who follow the rules

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Which Solution?

Which ERP system best meets your organization's needs?

Microsoft Dynamics 365 Business Central single application

Small & midsize businesses (SMBs) with 1 to 250+ users

Single solution that supports finance, sales, service, projects, supply chain, warehousing, manufacturing, & more

Decentralized operating model, with separate deployments for each company, entity, or country

Over 2000+ industry & horizontal apps on AppSource optimized for SMBs

Heavily invested in Dynamics NAV, GP, or SL & ready to move to the cloud

Businesses who need fast deployment & have limited IT resources to support

Sales & support processes through partner channel (partner >> Microsoft)

Two-tier ERP: Customers can use a hub & spoke model, deploying Dynamics 365 Finance & Supply Chain in the corporate office & Business Central in subsidiaries

Microsoft Dynamics 365 Finance & Supply Chain composable applications

Mid-market, multientity, large enterprises with 50 to 1000+ users

Individually deployable solutions for sales, service, customer insights, finance, projects, HR, supply chain, commerce, & more

Centralized operating models, with a single deployment spanning multiple companies, entities, or countries

Deep industry & vertical capabilities within applications

Heavily invested in Dynamics AX & looking to move to the cloud

Organizations with in-house IT resources to support go-live & maintenance

Sales & support process through Microsoft & partner channel

Side-by-Side Comparison

General



Target Employees	5-150	150+
Minimum Users	1	20
Maximum Users	300	5000
Scalability		
Global		
Multi-Company		



On-Premises		
Cloud		
Hosted Model		N/A
Configurability		
TCO	\$	\$\$\$\$



Basic
 Intermediate
 Advanced

Side-by-Side Comparison

Accounting



Basic GL		
Advanced GL		
Intercompany GL		
GL Budget		
Financial Reporting		
Cash		
Bank		



Electronic Banking		
AR		
AP		
Fixed Assets		
Grant Management	N/A or third party	
Encumbrance Management	N/A or third party	

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Basic



Intermediate



Advanced

Side-by-Side Comparison

Procurement



Purchase Orders		
Intercompany POs		
eProcurement		
Category Management	N/A or third party	
Contract Management		



Cost Management		
Landed Cost		
Vendor Management		
Vendor Self-Service	N/A or third party	
Workflow		



Basic



Intermediate



Advanced

Side-by-Side Comparison

Project Management



Project Management		
Resource Management		
Resource Scheduling		
Time & Expenses		
Work Breakdown Structures	N/A or third party	
Invoicing		
Time & Material Projects		



Fixed Projects		
Internal Projects		
Cost Projects	N/A or third party	
Investment Projects (Fixed Assets)	N/A or third party	
Grant Management	N/A or third party	
Revenue Recognition	N/A or third party	
Work in Progress (WIP)		

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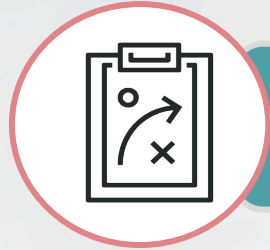
Basic
 Intermediate
 Advanced

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Planning for Your Next ERP Project

How We Can Assist



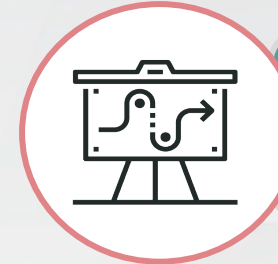
Digital Transformation Strategy

Technology Vision & Execution

- Current/Future State Business & IT Review
- Solution Assessment, Selection, & Licensing
- Execution Planning

Existing Solution Analysis & Recommendations

- Project Rescues
- Migrations/Upgrades
- Optimization/User Adoption



Digital Transformation Execution

Solution Execution

- Business Process Assessments
- Platform Selection
- Design, Build, & Support
- Supply Chain Assessments
- Sales & Marketing Consultation
- System Integrations
- Upgrades & Migrations
- Business Intelligence & Analytics

Project Management

- Project Monitoring & Management
- Project Audit & Stabilization

Organizational Change Management

- Transition Readiness
- Change Management
- End User & Administrator Training
- Post-Implementation Support

Questions?

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