# Your Dynamics GP Road Map
## Exploring Business Central

November 12, 2024

Microsoft
Partner

forvis
mazars

# U.S. Presence

## Top 10
U.S. Public
Accounting Firm*

## $2bn+
Revenue (2023)

## 76
Markets
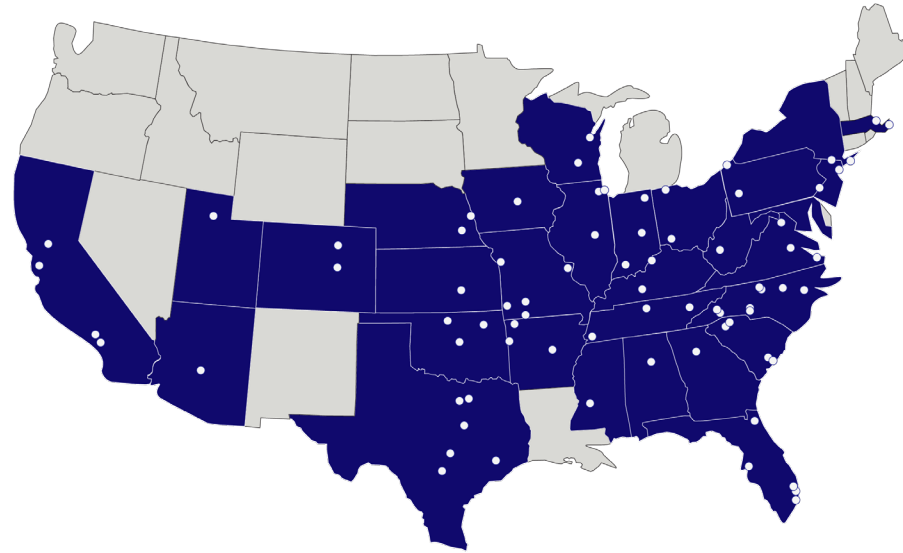
## 29
States

## 600+
Partners & Principals

## 7,000+
Employees

As of August 2024

○ Forvis Mazars markets



**Alabama**
Birmingham

**Arizona**
Phoenix

**Arkansas**
Fort Smith
Little Rock
Rogers

**California**
Irvine
Los Angeles
Sacramento
San Jose

**Colorado**
Colorado Springs
Denver

**Florida**
Boca Raton
Jacksonville
Miami
Tampa Bay
West Palm Beach

**Georgia**
Atlanta

**Illinois**
Chicago Downtown
Chicago Oakbrook Terrace
Decatur

**Indiana**
Evansville
Fort Wayne
Indianapolis

**Iowa**
Des Moines

**Kansas**
Wichita

**Kentucky**
Bowling Green
Louisville

**Massachusetts**
Boston Brewster
Boston State Street

**Mississippi**
Jackson

**Missouri**
Branson
Joplin
Kansas City
Springfield
St. Louis

**Nebraska**
Lincoln
Omaha

**New Jersey**
Iselin

**New York**
Long Island
New York City

**North Carolina**
Asheville
Charlotte SouthPark
Charlotte Uptown
Greensboro

**North Carolina (cont)**
Greenville
Hendersonville
Raleigh
Winston-Salem

**Ohio**
Cincinnati
Toledo

**Oklahoma**
Enid
Oklahoma City
Tulsa

**Pennsylvania**
Erie
Fort Washington
Pittsburgh

**South Carolina**
Charleston
Greenville
Spartanburg
Summerville

**Tennessee**
Knoxville
Memphis
Nashville

**Texas**
Austin
Dallas
Fort Worth
Houston
San Antonio
Waco

**Utah**
Salt Lake City

**Virginia**
Norfolk
Richmond
Tysons, VA

**West Virginia**
Charleston

**Wisconsin**
Appleton, WI
Madison, WI

forvis mazars

# Business Technology Services

Forvis Mazars provides enterprise resource planning (ERP) & customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, & support services.

Our end-to-end solutions help clients achieve their digital transformation goals by:

- Creating effective processes & strategies for future operations

- Designing & implementing modern operational systems

- Reviewing new business-facing technologies

- Leveraging existing investments in legacy technologies

- Integrating data solutions

forvis
mazars

# Business Technology Services

## ERP

**Microsoft Dynamics 365**

| | |
|---|---|
| Finance | Supply Chain |
| Commerce | Project Operations |
| Business Central | Dynamics GP |

**NetSuite**

**Sage & Sage Intacct**

**Trimble Viewpoint Spectrum & Vista**

## CRM

**Microsoft Dynamics 365**

| | |
|---|---|
| Sales | Customer Service |
| Customer Insights | Field Service |

**Salesforce**

**Marketing Automation**

## Advanced Technology

Insights

Microsoft Power BI

Solver Planning & Analysis

Automation

Microsoft Power Platform

Robotic Process Automation (RPA)

App Development

---

**Managed Services** for business applications, IT, & cybersecurity support.

---

Microsoft Partner

ORACLE NETSUITE
Solution Provider

Sage Partner

salesforce PARTNER

solver

forvis mazars

# Today's Presenters

Microsoft Practice

"**Our team is focused on delivering an Unmatched Client Experience® on every engagement.**"

– Chad Back, Partner

**Jason Layne**

Manager, Business Development Executive

jason.layne@us.forvismazars.com

**Jeremy Adkins-Hill**

Manager, Consulting

jeremy.adkinshill@us.forvismazars.com

Microsoft
Partner

forvis
mazars

# Objectives

1. Explain practical strategies & best practices for migrating from Dynamics GP to Business Central

2. Describe the steps involved, including data migration, system configuration, & user training

3. Identify key benefits for transitioning to Business Central

**forvis mazars**

# Agenda

1. Microsoft's Dynamics GP end of support announcement

2. Dynamics GP to Business Central Migration
   a. Dynamics GP vs. Business Central comparison
   b. ERP assessment
   c. Project management & planning
   d. Implementing Business Central
   e. Go-Live
   f. Post Go-Live

3. Your new world in modern ERP

4. Benefits of Business Central over other modern ERP platforms

5. Next steps

**forvis mazars**

# 01

# Microsoft's Dynamics GP End of Support Announcement

What does Microsoft's Dynamics GP end of support announcement mean?

# Licensing Announcement
## April 3, 2023

## Perpetual Licensing

New Sales of GP Perpetual Licenses Will End on April 1, 2025 – New Customer Sales Can Purchase Subscription Licenses

## New Sales

New Customer Sales of GP Will End on April 1, 2026 – Existing Customers May Still Purchase Licenses & Modules

## Updates

Microsoft Will Provide Tax Updates, Security Updates, & Hotfixes Three Times a Year Until at Least 2028

## Support

Customer Support Will Be Provided Under the Microsoft Modern Lifecycle Policy Until at Least 2028

**forvis mazars**

# Dynamics GP End of Support Announcement
## September 25, 2024

"Today, we're announcing we will end product support and updates for Dynamics GP on the 30$^{th}$ of September 2029 (with security patches ending on the 30$^{th}$ of April 2031). We want to take a moment to express our heartfelt gratitude to our loyal GP customers. Your trust and collaboration have been essential to building an incredibly strong GP community! We're dedicated to supporting your ongoing businesses and success during this transition.

With advancements in technology and changing market dynamics, business leaders are looking at their operations tools now more than ever to stay competitive, drive growth, improve profitability and ensure long-term company success. Microsoft is committed to ensuring we offer robust and innovative solutions to meet these needs. Dynamics 365 Business Central is Microsoft's flagship SMB ERP product, optimized to help businesses thrive in a new world of cloud and AI computing."
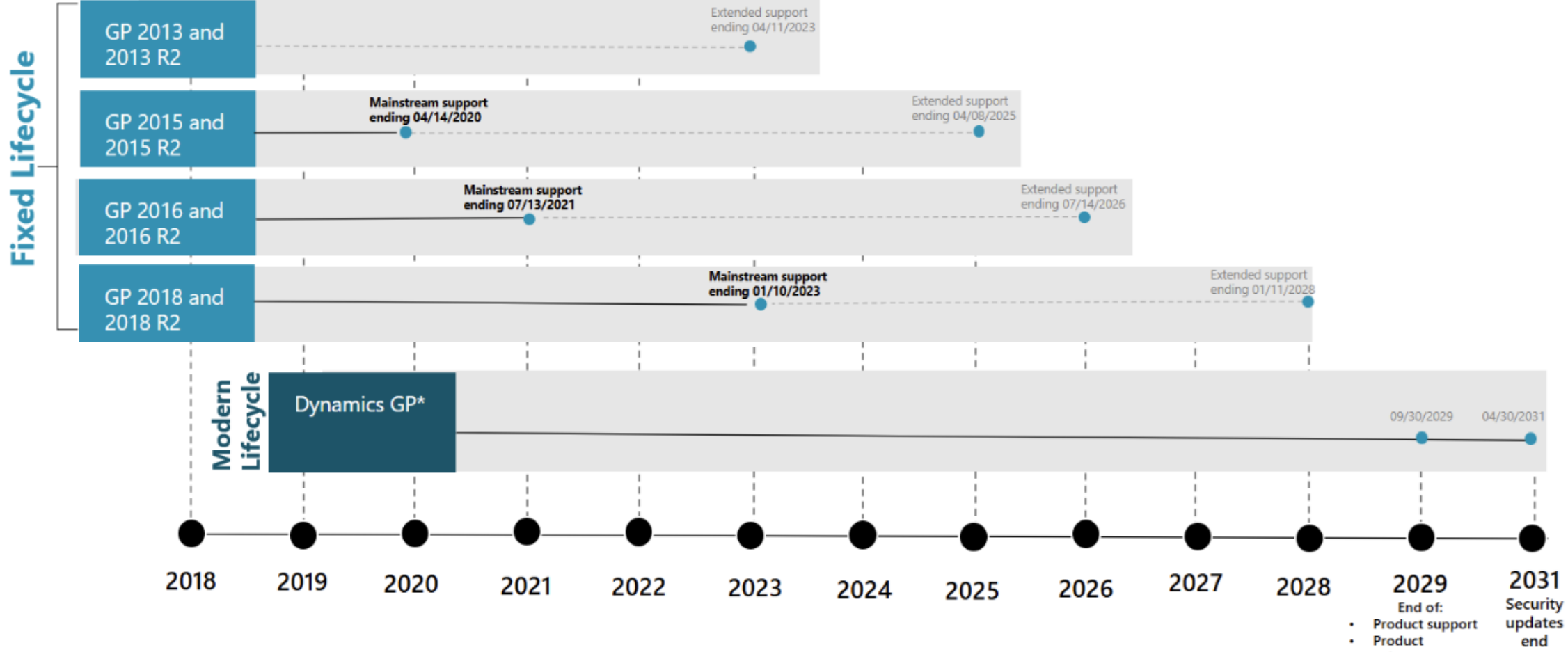
**Mike Morton**

Vice President, Microsoft Dynamics 365 Business Central

**forvis mazars**

# Dynamics GP Roadmap
## Dynamics GP Versions Governed by Fixed & Modern Lifecycle

**Fixed Lifecycle**

**GP 2013 and 2013 R2**
Extended support ending 04/11/2023

**GP 2015 and 2015 R2**
Mainstream support ending 04/14/2020
Extended support ending 04/08/2025

**GP 2016 and 2016 R2**
Mainstream support ending 07/13/2021
Extended support ending 07/14/2026

**GP 2018 and 2018 R2**
Mainstream support ending 01/10/2023
Extended support ending 01/11/2028

**Modern Lifecycle**

**Dynamics GP***
09/30/2029    04/30/2031

2018  2019  2020  2021  2022  2023  2024  2025  2026  2027  2028  2029  2031

**2029**
End of:
- Product support
- Product enhancements
- Regulatory updates

**2031**
Security updates end

* Applies to most recent version only (e.g., v18.6 as of 9.18.2024). Customers using an earlier version of Dynamics GP covered by the Modern Lifecycle Policy (i.e., v18.1 – 18.5) should upgrade to the current version of Dynamics GP.

Your Dynamics GP Road Map: Exploring Business Central

**forvis mazars**

# 02

## Dynamics GP to Business Central Migration

Learn about the steps in a Dynamics GP to Business Central migration.

# Dynamics GP to Business Central Migration
## Dynamics GP vs. Business Central

| | Dynamics GP On-Premises | Dynamics 365 Business Central |
|---|---|---|
| **Functionality** | Dynamics GP on-premises capabilities within the finance, operations, stock, CRM, projects, & manufacturing features do not provide out-of-the-box integration with Microsoft 365, Teams, or Power Platform. | Business Central is a comprehensive solution spanning finance, operations, inventory, sales, service, manufacturing, & projects. **Embedded capabilities across Microsoft 365 applications, including Outlook, Teams, & Power Platform** to increase user productivity & improve customer experiences |
| **Remote Access** | Desktop & web client is only available when on-premises. Additional work is required to provide access externally. | Desktop & mobile applications & web-based interface is available **on any device**. |
| **Artificial Intelligence (AI)** | Not available. | Business Central **brings the power of AI to small & midsize businesses** with features that can help you work smarter, adapt faster, & perform better. **Built-in AI features** can help you accelerate automation of repetitive tasks, improve customer service, anticipate business challenges, & enhance decision making. |
| **Upgrades** | While some versions of Dynamics GP are still covered by extended support – which provides limited product enhancements & bug fixes – the upgrade path is to move to Dynamics 365 Business Central. You can find out if your existing version is still covered by extended support <u>here</u> | **Industry-leading product roadmaps.** Microsoft releases two major updates to Business Central in April & October each year, plus monthly minor releases. These updates include new capabilities, performance, platform, & security improvements. **Reduce upgrade expenses.** All releases are automatically updated; however, the customer can schedule the time when the update should take place. |

**forvis mazars**

# Dynamics GP to Business Central Migration
## Dynamics GP vs. Business Central (continued)

| | Dynamics GP On-Premises | Dynamics 365 Business Central |
|---|---|---|
| User Interface (UI) | Dynamics GP on-premises solutions have an older interface & user experience. | **Business Central has a modern user interface**, including personalized dashboards, built-in reports, clear navigation, & a natural language search option. It's also available through the web & mobile devices |
| Power Platform Integration | Requires manual integration | Easily develop custom line of business applications with **seamless integration to Business Central data**. Build once & deploy apps in one click across iOS, Android, Windows, & web |
| Connectivity | Dynamics GP is predominantly an on-premises solution with limited connectivity. | Built on the common data service & easily integrated with hundreds of out-of-the-box solutions available on AppSource. **API connectivity available to support HR/Payroll** & other integrations with non-Microsoft products |
| Reporting | Standard reporting tools such as Excel integration, queries, smart lists, & Management Reporter | Extensive intelligent insights & reporting capabilities with embedded Power BI reports, plus full Excel integration |
| User Licenses | Full & Limited | Premium & Essentials |

forvis mazars

# Dynamics GP to Business Central Migration
## Dynamics GP vs. Business Central – Functionality

| Functionality | Dynamics GP | Business Central Essentials | Business Central Premium |
|---|---|---|---|
| Finance | Yes | Yes | Yes |
| Integrations | Yes | Yes, Using Excel | Yes, Using Excel |
| Inventory | Yes | Yes | Yes |
| Manufacturing | Yes | No | Yes |
| Payroll | Yes | No | No |
| Project Management | Yes* – No Capacity Management | Yes | Yes |
| Purchasing & Payables | Yes | Yes | Yes |
| Sales & Delivery | Yes* | Yes | Yes |
| Sales & Marketing | No | Yes | Yes |
| Service Management | Yes* | No | Yes |
| Supply Planning & Availability | Dynamics GP & Third Parties | Yes | Yes |
| Warehouse Management | Dynamics GP & Third Parties | Yes | Yes |

**\* Denotes Specific or Uncommon Instances/Usage**

forvis mazars

# Dynamics GP to Business Central Migration
## Dynamics GP vs. Business Central – What Can You Do in Business Central?

| | | | |
|---|---|---|---|
| Automate Accounts Payable | Consolidations | Create a New Company | Customer Approval Process |
| Drop Ship Sales Order | Email | Enter a Purchase Order | Enter a Sales Order |
| Financial Reports | Fixed Assets | Intercompany | Make to Stock |
| Manage a Project | Manage Your Inventory | Opportunity to Quote (Business Central) | Order to Cash |
| Procure to Pay | Produce Production Order | Purchase Invoices | Quote to Cash (Business Central + Outlook) |
| Quote to Cash (D365 Sales + Business Central) | Reconcile Bank Accounts | Sales Invoices | Workflow Approvals |

Your Dynamics GP Road Map: Exploring Business Central

forvis mazars

# Dynamics GP to Business Central Migration
## Dynamics GP vs. Business Central – User Experience

| Type | Dynamics GP | Business Central |
|---|---|---|
| Customizations | Dexterity | AL |
| Excel Connection | Export to Excel, Excel Reports | Export to Excel, Import From Excel |
| Finding Items | Menu-Based & Area Pages | Search-Based & Role Center |
| Third-Party Software | Go to Each Third Party | AppSource Website |
| Type of Application | Installed Client Application With Optional Browser-Based Client | Browser-Based Client |

Learn more here: https://learn.Microsoft.com/en-us/dynamics-gp/upgrade/migrate-gp-bc

**forvis mazars**

# Dynamics GP to Business Central Migration
## Dynamics GP vs. Business Central – Reporting

| Type | Dynamics GP | Business Central |
|------|-------------|------------------|
| Custom | SmartList Designer & SQL Server Reporting Services (SSRS) | Report Builder, Word, & Excel Layouts |
| Financial Reports | Management Reporter | Financial Reports |
| Lists | SmartList & Excel Reports | Lists |
| Operational Reports | Report Writer | Report Builder (Part of SSRS Report Builder) & Excel Layouts |
| Power BI | Yes, by Connecting to SQL Data | Yes, by Connecting to Web Services |

forvis mazars
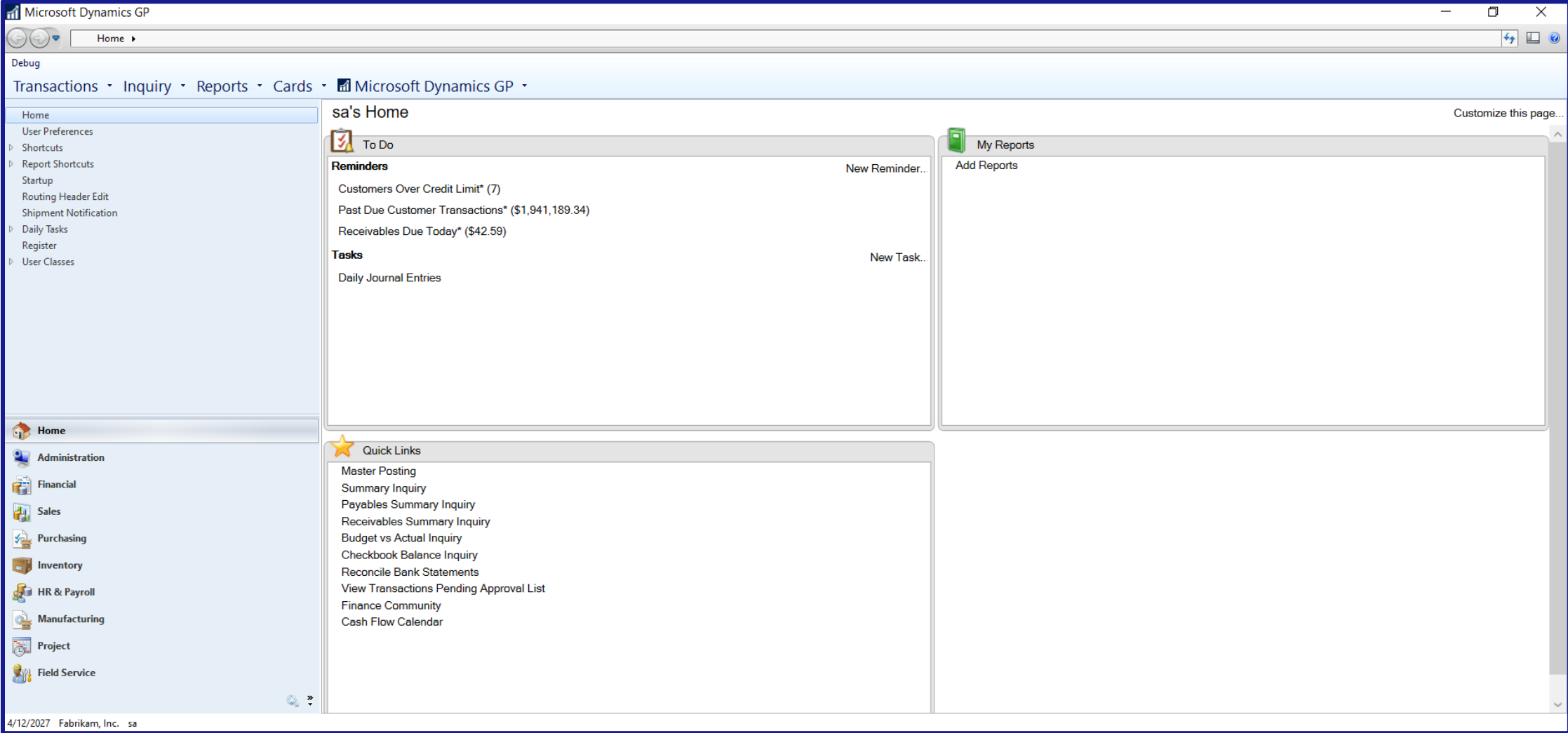
# Dynamics GP to Business Central Migration
## Dynamics GP vs. Business Central – User Interface

# Dynamics GP to Business Central Migration
## Dynamics GP vs. Business Central – User Interface

forvis mazars

# Dynamics GP to Business Central Migration
## Dynamics GP vs. Business Central – User Interface

forvis mazars
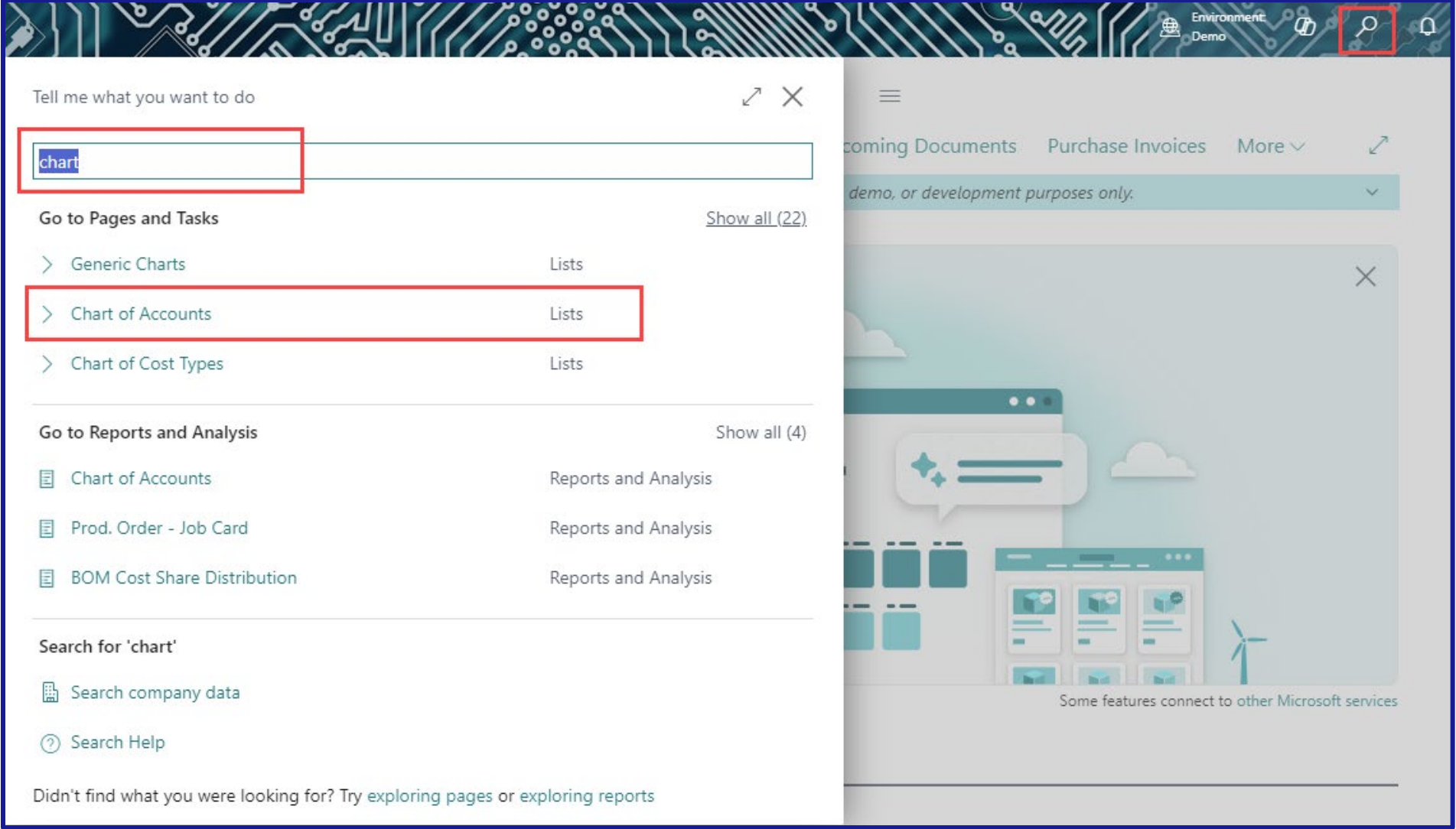
# Dynamics GP to Business Central Migration
## ERP Assessment







## Purpose

An assessment can help an organization select its next ERP. Although the selection of the ERP is the culmination of the assessment, it's common that most organizations identify inefficiencies & opportunities for improvement. An ERP assessment should deliver a comparison of multiple modern ERP systems against your requirements.

## Process

- Requirements Gathering
- Kickoff Call
- On-Site Visit
- Review of Documentation
- Follow-Up Meetings (Remote)
- Assessment Preparation
- Presentation of Findings
- Selection of New ERP

## Deliverables

- Fit Gap
- Total Cost of Ownership (TCO)
- ERP Assessment
- Presentation of Findings

forvis
mazars

# Dynamics GP to Business Central Migration
## ERP Assessment – Fit Gap

| Functional Area | Sub Area | Requirement | Phase | Summary Ranking | Response | Software/Add on |
|---|---|---|---|---|---|---|
| CRM | Marketing | Ability to assign due dates to tasks | 1 | N - Nice to Have | 2-Third party/optional addon | Dynamic CE |
| CRM | Marketing | Ability to assign users to task | 1 | N - Nice to Have | 2-Third party/optional addon | Dynamic CE |
| CRM | Marketing | Ability to attach documents to tasks | 1 | N - Nice to Have | 2-Third party/optional addon | Dynamic CE |
| CRM | Marketing | Ability to create tasks | 1 | N - Nice to Have | 2-Third party/optional addon | Dynamic CE |
| CRM | Marketing | Ability to create tasks | 1 | N - Nice to Have | 2-Third party/optional addon | Dynamic CE |
| CRM | Marketing | Ability to tie in social media | 1 | N - Nice to Have | 0-Not Included | |
| CRM | Marketing | Ability to track events | 1 | N - Nice to Have | 2-Third party/optional addon | Dynamic CE |
| CRM | Marketing | Ability to view open task by filters and calendar view | 1 | N - Nice to Have | 2-Third party/optional addon | Dynamic CE |
| CRM | Marketing | Embeded links to knowledge base | 1 | N - Nice to Have | 2-Third party/optional addon | Dynamic CE |
| CRM | Marketing | Image uploading abilities | 1 | M - Mandatory | 2-Third party/optional addon | Dynamic CE |
| CRM | Marketing | Moinitor a checklist of to do tasks for eliete members | 1 | N - Nice to Have | 2-Third party/optional addon | Dynamic CE |
| CRM | Marketing | Traceability of eliete member agreements | 1 | N - Nice to Have | 2-Third party/optional addon | Dynamic CE |
| CRM | Marketing | Uploading videos to youtube | 1 | N - Nice to Have | 0-Not Included | |
| CRM | Sales | Annual surveys | 1 | M - Mandatory | 2-Third party/optional addon | Dynamic CE |
| CRM | Sales | Engagement tracking from communications | 1 | M - Mandatory | 2-Third party/optional addon | Dynamic CE |
| CRM | Sales | Social media affectiveness tracking | 1 | V - Value Add | 2-Third party/optional addon | Dynamic CE |
| CRM | Sales | View customer notes | 1 | M - Mandatory | 2-Third party/optional addon | Dynamic CE |
| CRM | Sales | View customer order history | 1 | M - Mandatory | 2-Third party/optional addon | Dynamic CE |
| CRM | Sales | View multiple contacts within the same company | 1 | V - Value Add | 2-Third party/optional addon | Dynamic CE |
| Finance | Expense | Approval limits per position by finance department | 1 | M - Mandatory | 3-Configuration | Continia |
| Finance | Expense | Approval Process for Expense | 1 | V - Value Add | 2-Third party/optional addon | Continia expense management |
| Finance | Expense | Code to dimensions | 1 | M - Mandatory | 4-Standard Functionality | |
| Finance | Expense | Create expense reports from credit card statements | 1 | M - Mandatory | 2-Third party/optional addon | Continia expense management |
| Finance | Expense | Import bank transactions | 1 | N - Nice to Have | 2-Third party/optional addon | Continia |
| Finance | Expense | Print expense reports by employee | 1 | M - Mandatory | 2-Third party/optional addon | Continia |
| Finance | Expense | Simple credit card statement reconciliation | 1 | N - Nice to Have | 2-Third party/optional addon | Continia expense management |
| Finance | Expense | Traceability of date, amount, department and business purpose for expenses | 1 | M - Mandatory | 2-Third party/optional addon | Continia |
| Finance | Fixed Assets | Ability to add comments | 1 | M - Mandatory | 4-Standard Functionality | |
| Finance | Fixed Assets | Ability to add descriptions/ multipl descreiptions to FA | 1 | M - Mandatory | 4-Standard Functionality | |
| Finance | Fixed Assets | Ability to assign and track FA locations | 1 | N - Nice to Have | 4-Standard Functionality | |
| Finance | Fixed Assets | Ability to assign Insurance policies to FA | 1 | M - Mandatory | 3-Configuration | |
| Finance | Fixed Assets | Ability to attach documents to FA | 1 | M - Mandatory | 4-Standard Functionality | |
| Finance | Fixed Assets | Ability to attach photos | 1 | M - Mandatory | 4-Standard Functionality | |
| Finance | Fixed Assets | Ability to capture all costs associated with FA | 1 | M - Mandatory | 4-Standard Functionality | |
| Finance | Fixed Assets | Ability to check assets in and out to employees | 1 | N - Nice to Have | 4-Standard Functionality | |
| Finance | Fixed Assets | Ability to create asset groups | 1 | M - Mandatory | 4-Standard Functionality | |
| Finance | Fixed Assets | Ability to cycle count FA | 1 | M - Mandatory | 4-Standard Functionality | |
| Finance | Fixed Assets | Ability to import, transfer, and duplicate FA | 1 | N - Nice to Have | 4-Standard Functionality | |

forvis mazars

# Dynamics GP to Business Central Migration
## ERP Assessment – Fit Gap

### All Phases Fit

| | Solution 1 | Solution 2 | Solution 3 |
|---|---|---|---|
| CRM | 46% | 55% | 46% |
| Finance | 88% | 92% | 90% |
| Inventory | 83% | 82% | 78% |
| Purchasing | 98% | 99% | 98% |
| Reporting | 90% | 83% | 92% |
| Sales | 85% | 83% | 83% |
| Shipping | 73% | 73% | 75% |
| System | 74% | 69% | 68% |
| | | | |
| Total | 79% | 79% | 79% |

### Phase 1 Fit

| | Solution 1 | Solution 2 | Solution 3 |
|---|---|---|---|
| CRM | 46% | 55% | 46% |
| Finance | 88% | 88% | 90% |
| Inventory | | | |
| Purchasing | | | |
| Reporting | | | |
| Sales | | | |
| Shipping | | | |
| System | | | |
| | | | |
| Total | 67% | 71% | 68% |

### Phase 2 Fit

| | Solution 1 | Solution 2 | Solution 3 |
|---|---|---|---|
| CRM | | | |
| Finance | | | |
| Inventory | 82% | 82% | 77% |
| Purchasing | 98% | 99% | 98% |
| Reporting | | | |
| Sales | 85% | 83% | 84% |
| Shipping | 69% | 61% | 64% |
| System | 74% | 70% | 68% |
| | | | |
| Total | 82% | 79% | 78% |

### Phase 3 Fit

| | Solution 1 | Solution 2 | Solution 3 |
|---|---|---|---|
| CRM | | | |
| Finance | | | |
| Inventory | 100% | 100% | 100% |
| Purchasing | 100% | 100% | 100% |
| Reporting | 90% | 83% | 92% |
| Sales | 92% | 92% | 83% |
| Shipping | 100% | 100% | 100% |
| System | | | |
| | | | |
| Total | 96% | 95% | 95% |

### Mandatory Only, All Phases

| | Solution 1 | Solution 2 | Solution 3 |
|---|---|---|---|
| CRM | 50% | 60% | 50% |
| Finance | 89% | 92% | 91% |
| Inventory | 85% | 85% | 79% |
| Purchasing | 98% | 99% | 98% |
| Reporting | 88% | 80% | 90% |
| Sales | 84% | 83% | 82% |
| Shipping | 72% | 72% | 75% |
| System | 80% | 78% | 78% |
| | | | |
| Total | 81% | 81% | 80% |

### Mandatory Only, Phase 1

| | Solution 1 | Solution 2 | Solution 3 |
|---|---|---|---|
| CRM | 50% | 50% | 50% |
| Finance | 89% | 89% | 89% |
| Inventory | | | |
| Purchasing | | | |
| Reporting | | | |
| Sales | | | |
| Shipping | | | |
| System | | | |
| | | | |
| Total | 70% | 70% | 70% |

### Mandatory Only, Phase 2

| | Solution 1 | Solution 2 | Solution 3 |
|---|---|---|---|
| CRM | | | |
| Finance | | | |
| Inventory | 84% | 84% | 84% |
| Purchasing | 98% | 98% | 98% |
| Reporting | | | |
| Sales | 84% | 84% | 84% |
| Shipping | 69% | 69% | 69% |
| System | 80% | 80% | 80% |
| | | | |
| Total | 83% | 83% | 83% |

### Mandatory Only, Phase 3

| | Solution 1 | Solution 2 | Solution 3 |
|---|---|---|---|
| CRM | | | |
| Finance | | | |
| Inventory | 100% | 100% | 100% |
| Purchasing | 100% | 100% | 100% |
| Reporting | 88% | 88% | 88% |
| Sales | 88% | 88% | 88% |
| Shipping | 100% | 100% | 100% |
| System | | | |
| | | | |
| Total | 95% | 95% | 95% |

forvis mazars

# Dynamics GP to Business Central Migration
## ERP Assessment – Total Cost of Ownership (TCO) Example

| Solution 1 Licenses | Quantity | List Price | Extended List Price | Notes |
|---|---|---|---|---|
| Essential Full | 12 | $ 70 | $ 840 | |
| Team Member | 0 | $ 8 | $ - | |
| Subscription Total | | | $ 840 | |

| Solution 1 | Year 1 | Years 2 | Year 3 | Year 4 | Year 5 |
|---|---|---|---|---|---|
| Essential Full | $ 10,080 | $ 54,600 | $ 57,330 | $ 60,197 | $ 63,206 |
| Team Member | $ - | $ - | $ - | $ - | $ - |
| Third Party/ISV | $ - | | | | |
| Implementation Services | $ 375,000.00 | | | | |
| Total | $ 385,080 | $ 54,600.00 | $ 57,330.00 | $ 60,196.50 | $ 63,206.33 |
| 5 Year Total | | | | $ 620,412.83 | |

| Solution 2 Licenses | Quantity | List Price | Extended List Price | Notes |
|---|---|---|---|---|
| Full User | 5 | $ 100 | $ 500 | |
| | | | $ - | |
| Subscription Total | | | $ 500 | |

| Solution 2 | Year 1 | Years 2 | Year 3 | Year 4 | Year 5 |
|---|---|---|---|---|---|
| Annual Software License Cost | $ 50,000 | $ 80,000 | $ 84,000 | $ 88,200 | $ 92,610 |
| | $ - | $ - | $ - | $ - | $ - |
| Implementation Services | $ 303,485 | | | | |
| Total | $ 353,485 | $ 80,000.00 | $ 84,000.00 | $ 88,200.00 | $ 92,610.00 |
| 5 Year Total | | | | $ 698,295.00 | |

| Solution 3 Licenses | Quantity | List Price | Extended List Price | Notes |
|---|---|---|---|---|
| Full User - Year 1 | 5 | $ 350 | $ 1,750 | |
| Full User - Year 2 | 60 | $ 350 | $ 21,000 | |
| Subscription Total | | | $ 22,750 | |

| Solution 3 | Year 1 | Years 2 | Year 3 | Year 4 | Year 5 |
|---|---|---|---|---|---|
| Annual Software License Cost | $ 21,000 | $ 273,000 | $ 286,650 | $ 300,983 | $ 316,032 |
| | | | | | |
| Implementation Services | $ 120,000 | | | | |
| Total | $ 141,000 | $ 273,000.00 | $ 286,650.00 | $ 300,982.50 | $ 316,031.63 |
| 5 Year Total | | | | $ 1,317,664.13 | |

| | Solution 1 | Solution 2 | Solution 3 |
|---|---|---|---|
| Year 1 | $ 385,080.00 | $ 353,485.00 | $ 141,000.00 |
| Year 2 | $ 54,600.00 | $ 80,000.00 | $ 273,000.00 |
| Year 3 | $ 57,330.00 | $ 84,000.00 | $ 286,650.00 |
| Year 4 | $ 60,196.50 | $ 88,200.00 | $ 300,982.50 |
| Year 5 | $ 63,206.33 | $ 92,610.00 | $ 316,031.63 |
| Total | $ 620,412.83 | $ 698,295.00 | $ 1,317,664.13 |

Your Dynamics GP Road Map: Exploring Business Central

forvis mazars

# Dynamics GP to Business Central Migration
## ERP Assessment – ERP Assessment

**Executive Summary**

Cronus has reached a spot where their current software stack is creating a ceiling to their business. Due to internal concerns with their current software stack Forvis Mazars has been engaged to provide a systems assessment with the goal of identifying areas for improvement and ultimately recommending a new ERP. The recommended ERP should accomplish several things:

- Allow Cronus to become more efficient
- Allow Cronus to better serve their customers
- Allow Cronus to downsize their current staff and reassign those people to new roles in the organization
- Allow Cronus to focus on value added tasks to help the organization grow to unmatched levels

Taking into consideration the complexity of processes in place today Forvis Mazars has come up with a list of industry leading solutions that will help Cronus reach levels not previously considered. Forvis Mazars ranked the requirements identified against three separate ERP systems:

1. Microsoft Dynamics Business Central
2. NetSuite
3. Acumatica

In addition to the three identified solutions Forvis Mazars also evaluated a solution from Sage. Due to the very close scoring of the three identified and the gap to Sage, Forvis Mazars eliminated Sage as a possibility. In most cases there are two solutions that stand out from the rest but based on the identified requirements and phased approach Forvis Mazars recommends further evaluation of all three solutions: **Microsoft Dynamics Business Central, NetSuite** and **Acumatica**. We highly recommend that in addition to further evaluation Cronus should also consider the Total Cost of Ownership (TCO) of the solutions.

One major concern about this project is the anticipated resistance to change from the IT department at Cronus. The end users seem to be open to change and advancement but the feeling out of the IT department felt differently. With the shift to a Modern ERP platform the number of development resources needed is significantly different than it was in years past. Typically, most organizations move those development resources to tasks like BI development.

In evaluating three separate solutions Cronus will have the opportunity to gather a group of stakeholders and get buy in to an implementation project early in the process. That group of stakeholders should be afforded the opportunity to not only see the presented options but also be a part of the final selection process. Ultimately, the success of a new ERP implementation

**Assessment Procedure**

This assessment was conducted via a two-day onsite visit, a series of interviews and some job shadowing. We have reviewed the current processes and procedures to the best of our knowledge and abilities with the given circumstances. All these elements allowed us to provide the following conclusive software system suggestions.

**Document Inputs**

Multiple sources were used as inputs to this system evaluation document including but not limited to meetings and interviews held with key personnel to discuss the steps and requirements for deployment. Meetings included the appropriate team members from each of Cronus's functional areas. Such conversations with key decision makers during communications have allowed Forvis Mazars to gather information directly from personnel. Cronus also provided documentation outlining key business processes, reporting requirements, process flows, organizational charts, and other pertinent information.

**Purpose**

The purpose of this assessment was to aid in the recommendation of a modern ERP for Cronus. In the evaluation of systems available which meet the business requirements Forvis Mazars will make recommendations across multiple solution to be implemented in a multiple phased approach. The initial phase will focus on replacing QuickBooks with a modern ERP. Future phases will focus on standardizing and modernizing the in place external systems. This would include replacing any standalone or antiquated solutions. In selecting systems for Cronus, to evaluate, Forvis Mazars considered the following:

**Longevity:** The existing ERP has been in place at Cronus for multiple years. The investment into a new system should be one that can remain in place and aid Cronus for the next 15 – 20 years or even longer.

**Scalability:** In the future as Cronus evaluates expanding product offerings and meeting rises in customer demand; it is essential that an environment exists which does not require the organization to increase headcount to match the growth. The system should also not constrain the business from a functionality standpoint.

**Simplicity:** It is essential that any changes in new solutions are simple for the users. Also, to take full advantage of the systems in place, all users must use the system as it is originally intended and designed. Simplicity is the key to keeping users engaged, bought in, and using the system properly.

**Standardization:** As it is consistent in many companies, tribal knowledge is typically heavily relied upon. The introduction of a new systems will aid in both the formalization and standardization of various business process eliminating the reliance on company tribal knowledge. Any recommended solutions introduced must be the same available to all required users. This allows current resources to help transfer knowledge where needed without the

**forvis mazars**

# Dynamics GP to Business Central Migration
## ERP Assessment – ERP Assessment

### System

The finance system of record at Cronus is QuickBooks. Cronus has also utilized many custom or external systems and even keeps some processes outside of any system today. Below is a breakdown of the different software solutions in place at Cronus today:

| Product Name | Solution Vendor | Status | Future State projection |
|---|---|---|---|
| AirTable | Airtable | Drop Ship, Master Order, Truck Loads, Customer Credit | Replace with Modern ERP / CRM |
| Canva | Canva | Marketing and Designs | Keep |
| ClickUp | ClickUp | Project Management | Evaluate / Replace with CRM |
| ADP | Paycom | HR and Payroll | Keep |
| QuickBooks Online | Intuit Inc. | ERP of Record | Replace with Modern ERP |
| Survey Monkey | Survey Monkey | Customer Surveys | Evaluate / Replace with CRM |

### Finance

Finance includes all records of various financial transactions within Cronus. These financial activities are tracked to help record and analyze financial transactions to help manage an organization's income, expenses, and assets.

Cronus uses the standard GL account structure within QuickBooks. Everyone in Finance is familiar with the concept of a GL account as a description.

Payment methods currently include the below list.
- Checks
- Credit Card
- ACH

Currently the sales tax is internal and calculated in QuickBooks.

Some additional important information is that there are currently 7 bank accounts. Each bank account is utilized for one specific purpose (i.e. Payroll, Payables, Expenses, Owner's Personal Bank Account, etc.)

#### Pain Points
- Reporting capabilities of the existing system are limited.
- No fixed asset module in the current system.
- No dashboarding capabilities.
- Manual intervention on statement of cash flow, and allowance for doubtful accounts.

#### Wants / Needs
- A modern ERP platform that is fully integrated with automation for many of the processes in place today.

forvis mazars

# Dynamics GP to Business Central Migration
## ERP Assessment – ERP Assessment

## Project Risks

All projects are laden with risks. Outside factors can influence the scope but most organizations are able to identify those factors and put risk mitigation strategies in place. There are some standard risk categories that are common to any project: Go-Live Date, Historical Data, Learning Curve, and Personnel. While others present themselves based on requirements of the project, company specifications or leadership objectives. Some of these risks were identified at Cronus such as Limitation of Functionality in Solutions, Phased Implementation Approach and Product Lifecycle.

**Adoption of Process Changes:** Switching ERPs always brings about operational process changes. Depending on the ERP selected those process changes can vary greatly. As Cronus goes through the implementation cycle, they will identify situations that require operational changes in lieu of customization. Cronus has been vocally against customizations which increases the likelihood of process change.

|  | S1 | S2 | S3 |
|---|---|---|---|
| Adoption of Process Change | Medium | Medium | High |

**Go-Live Date:** Cronus has currently not identified a specific Go-Live date. It is good to have a date in mind at the beginning of a project but having that date being too rigid is a dangerous notion. Any solution recommended can aim for the decided date, but it will require an immense amount of flexibility from Cronus to meet any Go-live date.

|  | S1 | S2 | S3 |
|---|---|---|---|
| Go-Live Date | Low | Low | Low |

**Historical Data:** It is important to be open and understanding about the capabilities of modern ERP systems compared to previous systems. It is essential for any business to have access to all their historical data 2hile knowing the how and where of it will be critical. The accuracy of this conversion may impact the effectiveness of how the new software's used.

|  | S1 | S2 | S3 |
|---|---|---|---|
| Historical Data | Low | Low | Medium |

### Risk Rating

|  | S1 | S2 | S3 |
|---|---|---|---|
| Adoption of Process Change | Medium | Medium | High |
| Go-Live Date | Low | Low | Low |
| Historical Data | Low | Low | Medium |
| Learning Curve | Medium | Medium | Medium |
| Limitation of Functionality | Medium | Medium | High |
| Personnel | Low | Low | Low |
| Phased Implementation Approach | Low | Low | Low |
| Product Lifecycle | Low | Medium | Low |

### Risk Scores

|  | S1 | S2 | S3 |
|---|---|---|---|
| Adoption of Process Change | 2 | 2 | 3 |
| Go-Live Date | 1 | 1 | 1 |
| Historical Data | 1 | 1 | 2 |
| Learning Curve | 2 | 2 | 2 |
| Limitation of Functionality | 2 | 2 | 3 |
| Personnel | 1 | 1 | 1 |
| Phased Implementation Approach | 1 | 1 | 1 |
| Product Lifecycle | 1 | 2 | 1 |
| TOTAL | 11 | 12 | 14 |

|  | S1 | S2 | S3 |
|---|---|---|---|
| Overall Risk | Low | Medium | Medium |

forvis mazars

# ERP Assessment – Example

Dynamics GP to Business Central Migration

## Microsoft Business Central

Microsoft Dynamics 365 Business Central is a cloud-based enterprise resource planning (ERP) software solution that integrates finance, sales, service, and operations functions into a single platform.

| Pros | Cons |
|---|---|
| Utilizes 3rd party products for enhanced functionality | Utilizes 3rd party products for enhanced functionality |
| Midmarket solution, more configuration, less customization | Limited out of the box reporting that does not need to be configured / setup / saved |
| Lower software cost than most competitors in the marketplace | Not a vertical specific ERP |

### Estimated Costs

| Software Annual | Low Cost | High Cost |
|---|---|---|
| Phase 1 | $10,800 | N / A |
| Phase 2 | $54,600 | N / A |

| Services | Low Cost | High Cost |
|---|---|---|
| Phase 1 | $120,000 | $180,000 |
| Phase 2 | $200,000 | $250,000 |
| All Phases | $320,000 | $430,000 |

# Dynamics GP to Business Central Migration
## ERP Assessment – Presentation of Findings Example



**Forvis Mazars: Business Technology Services**

ERP RFP Response

# Dynamics GP to Business Central Migration
## ERP Assessment – Presentation of Findings Example

**Forvis Mazars Microsoft Consulting**

- **Top 1% of Microsoft Partner**
- **Inner Circle partner managed by Microsoft (PDM)**
- **Consulting Experience**
  - 1000+ successful implementations
  - 150+ dedicated resources
  - 10+ years average consultant experience
- 30+ years Great Plains implementer
- **Dynamics Business Central Partner since release**
- 25+ years Microsoft Dynamics 365 Partner
- 15+ years Microsoft Customer Engagement Partner (CRM)
- **Leading Insight & Automation Practice utilizing Microsoft Azure and Powered Automate**
- **20+ years CFO Consulting services**
- 15+ years Corporate Performance Management services (Reporting)

**forvis mazars**

# Dynamics GP to Business Central Migration
## ERP Assessment – Presentation of Findings Example

**Forvis Mazars Microsoft Partnership**

# Dynamics GP to Business Central Migration
## ERP Assessment – Presentation of Findings Example

We think of the modern workplace as the intersection of people, process, & technology. It's about how people experience work through the prism of technology.
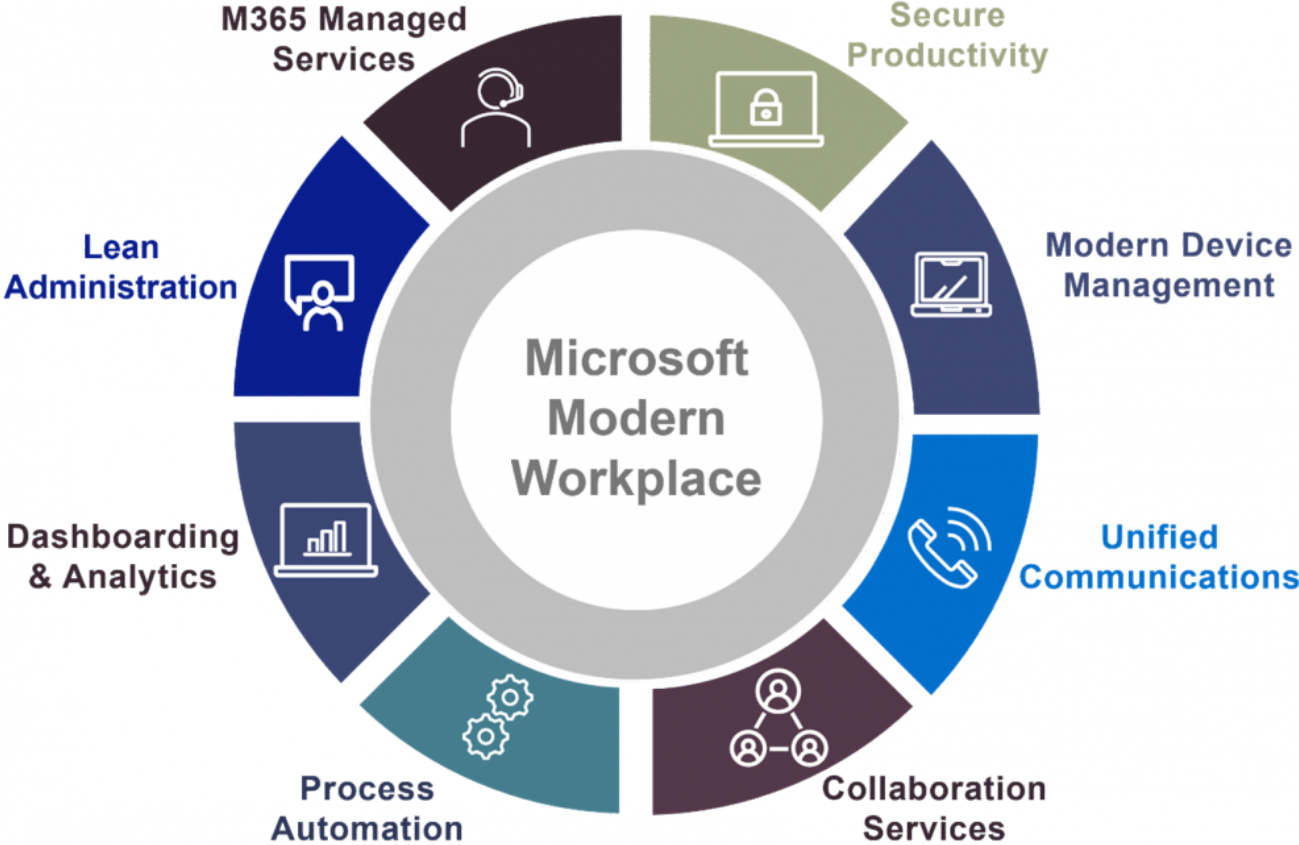
forvis mazars

# Dynamics GP to Business Central Migration
## ERP Assessment – Presentation of Findings Example

**Business Central: Implementation Estimate**

- Offers both cloud & on-premise deployments
- Software license costs:
    - $70 per full essential user, per month
    - $8 per team member user, per month
    - Estimate: 45 full users – $3,150 per month
        - Annual cost – $60,000 to $80,000
- **Expected Project Length: 8 to 12 months**

| **Estimate:** | | |
|---|---|---|
| Low: | Hrs: 1,276 | Fees: $350,900 |
| High: | Hrs: 1,455 | Fees: $400,125 |

*Total Estimated Timeline: 8–12 months*

**Investment Assumptions**

- Two deployments, on-premise for corporate entities & cloud-based for all other entities
- No integration between the two deployments outside manual uploads into corporate
- Hours will be billed on a time & materials (T&M) basis
- Projects are delivered with a blended team rate
- Support plans beyond initial month-end to be discussed during implementation for best economic fit

**forvis mazars**

# Dynamics GP to Business Central Migration
## Project Management & Planning

**Plan** — **Execute** — **Deliver**

**Initiation & Definition**
- Planning
- Requirements
- Provisioning

**Analysis & Design**
- Configuration
- Data Migration
- Development

**Testing & Training**
- Power User Training
- Acceptance Testing
- Cutover Planning

**Cutover & Go-Live**
- End User Training
- Cutover Activities
- Go-Live
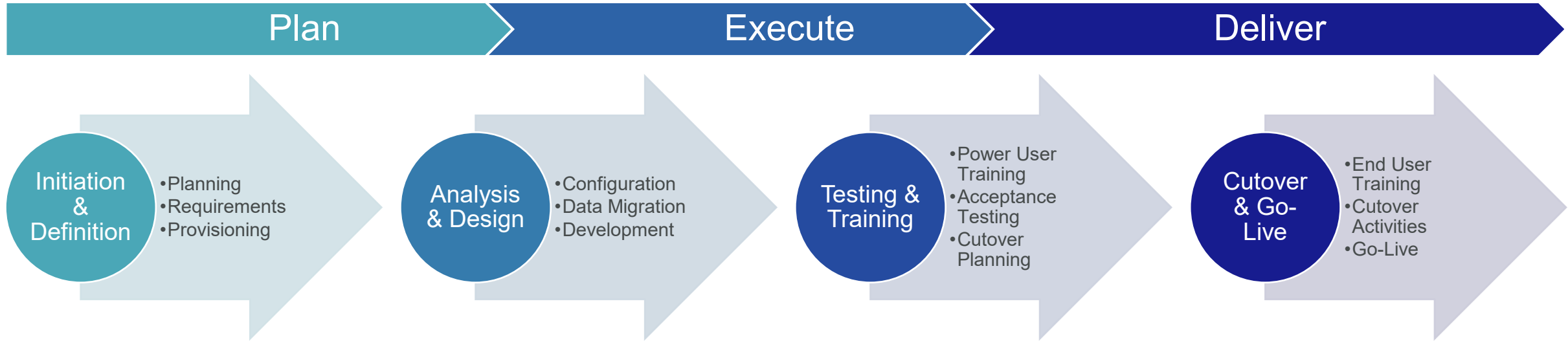
Our project management professionals will work with your internal resources to help:
- Monitor project health & communication, including risk mitigation
- Manage tasks & delivery timeline
- Track scope & costs
- Take care of standards & signoffs for key activities

Your Dynamics GP Road Map: Exploring Business Central

**forvis mazars**

# Dynamics GP to Business Central Migration
## Project Management & Planning



**Business Strategy**

**Agile / Iterative Concepts & Tools**

| Solution Envisioning | Analysis + Evaluation | Design | Build & Develop | Deployment | Operation | Cross-phase Processes |

Project Management and IT Excellence

Organizational Change Management

Business Process Management and Improvements

**forvis mazars**
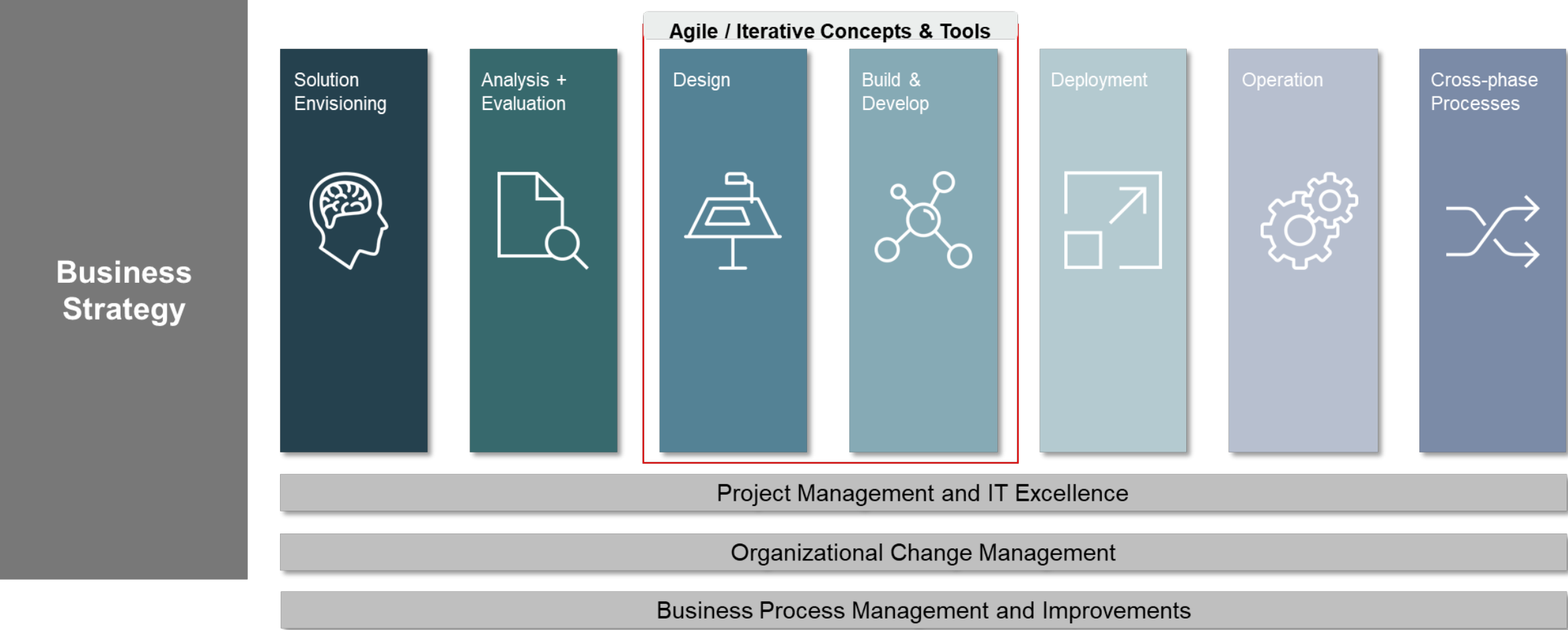
# Dynamics GP to Business Central Migration
## Project Management & Planning

**KEY ACTIVITIES** By Phase

| Analysis | Design | Build & Develop | Deployment | Operation | Cross-phase Processes |
|---|---|---|---|---|---|
| • Project Initiation<br><br>• Concept /System Overviews, Scope & Requirements<br><br>• Gap/Fit Analysis (Modifications & Integrations)<br><br>• Confirm ISV Solutions<br><br>• Future System Landscape & Solution Review<br><br>• Scope, Budget, Timeline<br><br>• Software Provisioning | • Design Workshops<br><br>• Configuration & Documentation<br><br>• Solution Planning (ERP, ISVs)<br><br>• Reporting Needs<br><br>• Development/Spec Designs | • Update, Finalize, Configuration<br><br>• User Training<br><br>• Data Migration<br><br>• Security<br><br>• Modification Design & Development<br><br>• Integrations | • User Acceptance Testing<br><br>• Go-Live readiness<br><br>• Cut Over Planning and go live checklist<br><br>• Create Production Environment<br><br>• End User Training | • Go Live Support<br><br>• Post Implementation Review<br><br>• Transition to Support Planning | • Environment Management<br><br>• Reporting/BI<br><br>• Data Migration<br><br>• Test Strategy, Planning and Execution<br><br>• Integrations<br><br>• Development<br><br>• Security |

forvis mazars

# Dynamics GP to Business Central Migration

## Project Management & Planning



- **Leverage Base Software**
- Configure effectively & personalize
- **Reduce Customizations**
- Adapt to ERP where possible
- Leverage proven ISV Solutions
- Utilize the Publisher Ecosystem
- **Target Realistic Scope**
- Client skills, workload, change tolerance
- Discipline & adherence
- **Enable Self-Sufficiency**

**forvis mazars**

# Dynamics GP to Business Central Migration
## Project Management & Planning

## Cronus

| | 10% |
| --- | --- |
| **Executive Sponsor & Steering Committee** | |

| | 50% |
| --- | --- |
| **Project Manager** | |

| 25% Business Analyst | 40% IT Team | 50% Subject Matter Expert |
| --- | --- | --- |

*Time varies per stage of project (% is spread across resources not each person)

## Forvis Mazars

**Engagement Professionals**

| Solutions Architect | Technical Architect |
| --- | --- |

**Project Manager**

| Finance Lead | Finance Analyst | Developer | Reporting & Data Analyst |
| --- | --- | --- | --- |
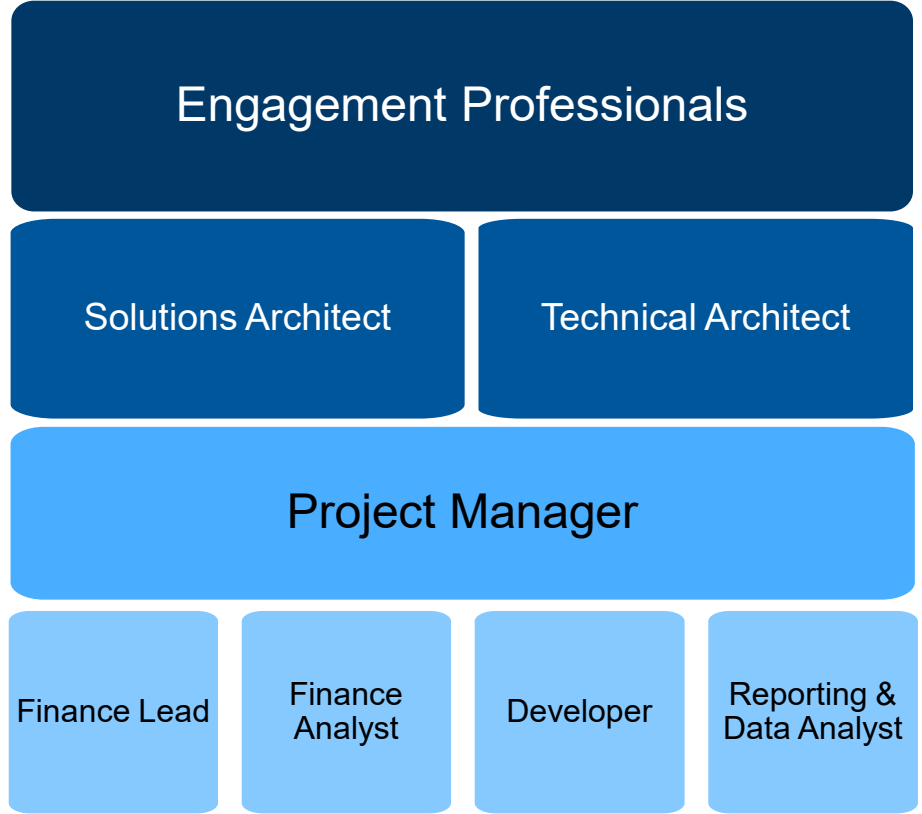
**\*Roles will vary slightly based on ERP solution chosen\***

forvis mazars
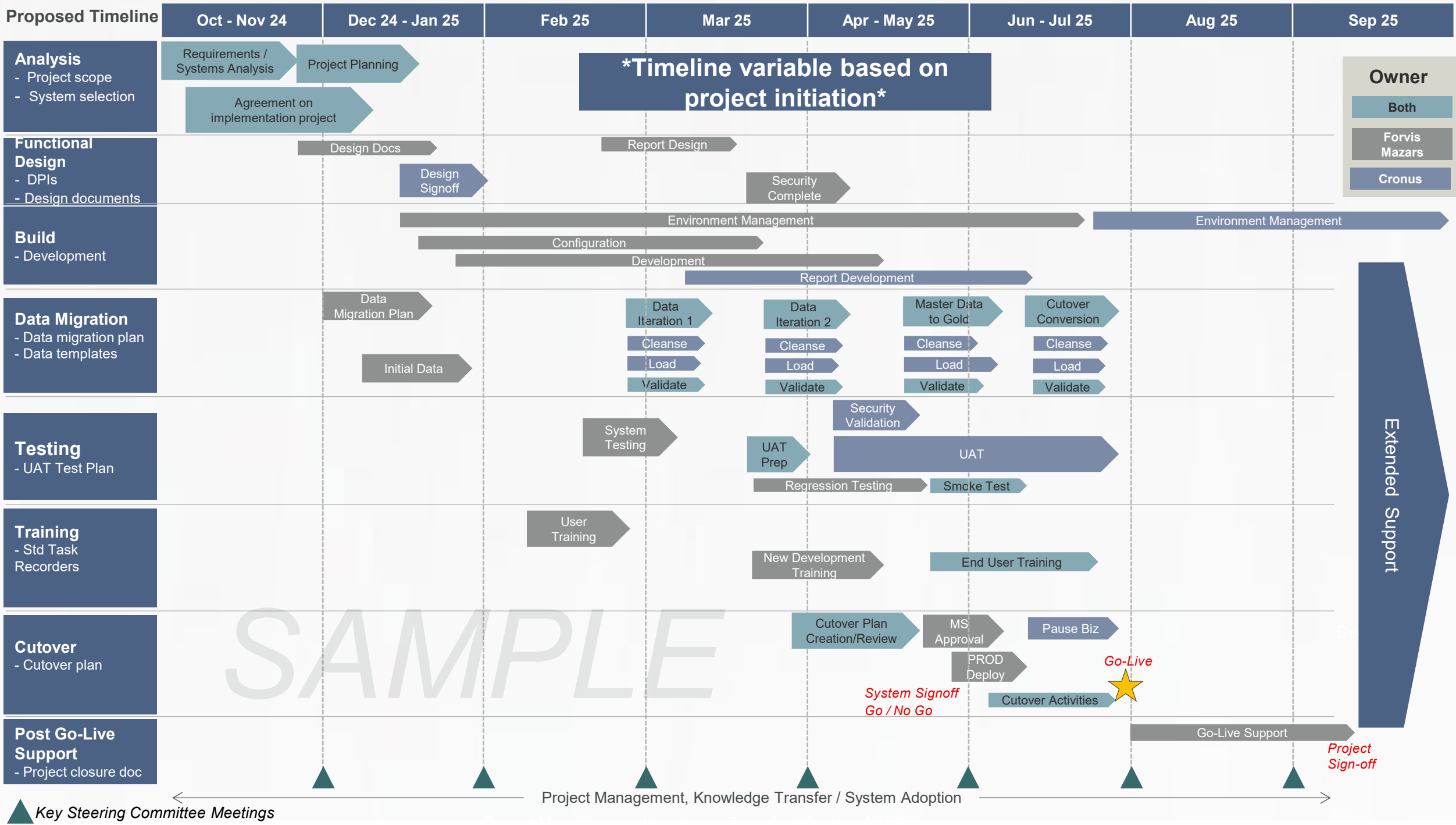
# Dynamics GP to Business Central Migration
## Implementing Business Central



### Master Data Prep

Master data is the foundation of any ERP. A strong foundation can deliver strong results. Some best practices in maintaining master data include:

- Data Standardization
- Deactivate Obsolete Records
- Define Master Record Nomenclature
- Removal of Duplicate Records
- Verify Master Record Setup



### Process

Implementing Business Central should be done methodically, not rushed. A general implementation plan consists of:

- Data Prep
- System Setup
- Data Import
- Data Validation
- End User Acceptance Testing
- Training



### Go-Live

Depending on the complexity of your project, most implementations take 9–18 months. Rapid implementations are possible for small organizations & can be completed in less than 6 months. Go-Live generally lasts at least a week & you should expect to have your implementation team on-site with you.

Your Dynamics GP Road Map: Exploring Business Central

**forvis mazars**

# Dynamics GP to Business Central Migration
## Implementing Business Central

### Master Data Best Practices

| Finance | Inventory | Manufacturing |
|---|---|---|
| • Allocation Accounts<br>• Chart of Accounts<br>• Fiscal Periods<br>• Fixed Assets<br>• Multi-Company<br>• Multi-Currency | • Item Classes<br>• Items<br>• Locations/Sites<br>• Reason Codes<br>• Units of Measure | • Bill of Materials (BOMs)<br>• Labor Codes<br>• Machines<br>• Resources<br>• Routings<br>• Work Centers |

| Purchasing | Sales | System |
|---|---|---|
| • Addresses<br>• Buyers<br>• Customer/Vendor Mapping<br>• Vendor Classes<br>• Vendors | • Addresses<br>• Customer Classes<br>• Customers<br>• National Accounts<br>• Salespeople | • Payment Methods<br>• Payment Terms<br>• Shipment Methods |

forvis mazars

# Dynamics GP to Business Central Migration
## Implementing Business Central





## System Setup

There are many tasks that happen during system setup. This includes, but is not limited to:

- Company Configuration
- Data Mapping
- ISV Installations
- User Setup

## Data Import

Data can be imported many ways, this includes:

- Configuration Packages
- Custom Integration
- Microsoft Data Migration Tool

The types of data imported are standard on every implementation & include:

- Historical Summary Balances
- Master Record Balances
- Master Records
- Open Transactions

**forvis mazars**

# Dynamics GP to Business Central Migration
## Implementing Business Central
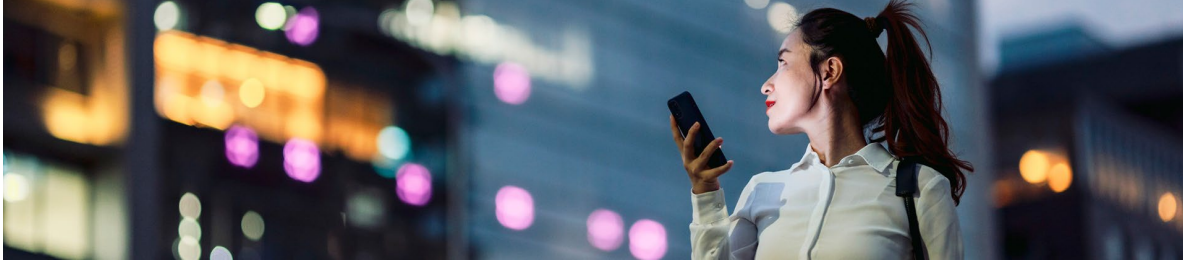




## Data Validation

Once Business Central has been set up, based on your business requirements, & the data has been imported you will be introduced to various parts of the system & asked to validate the data.

**What does this mean?** Simply making sure you have access to the data you need, & it looks as you would expect it to look. For example, if a customer has an open balance of $9,845.53 there should be a total of $9,845.53 worth of invoices.

GL Summary balances should match what your financials say. To dive deeper on financials, you should be able to generate a financial statement for **ANY** historical period & it should match what you can generate out of GP today.

## End User Training

After data validation, your implementation team will work with your end users on learning their new system. This will include the primary aspects of their current role plus any new tasks that come with your Business Central implementation:

- Daily Tasks
- Weekly Tasks
- Monthly Tasks
- Master Records Setup
- Reporting

**forvis mazars**

# Dynamics GP to Business Central Migration
## Implementing Business Central





## End User Acceptance Testing

After users have been thoroughly trained & your data has been validated you will enter a phase commonly known as End User Acceptance Testing. The most common way to navigate this phase is by entering new transactions into your new system & processing them from start to finish. This can be old transactions not included in your data load, or it can be brand new transactions entered simultaneously in GP & Business Central. At the end of this phase, we must ensure that there are no unexpected errors & that you can successfully process your transactions in Business Central.
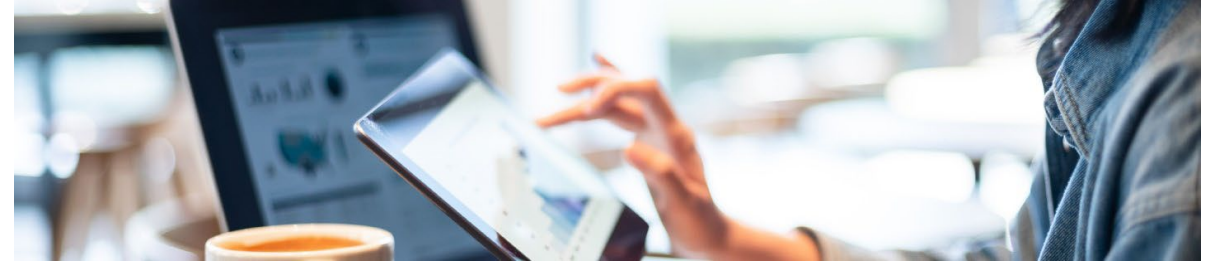
## Cutover Planning

The final phase of implementation starts with cutover planning. Traditionally this is a simple meeting centered on when cutover happens. In most cases this meeting can be completed in an hour or less. Attendees include:

### Client

- Executive Sponsor
- Project Manager
- Key Stakeholders

### Forvis Mazars

- Technology Partner
- Project Manager
- Architect(s)
- Project Leads

**forvis mazars**

# Dynamics GP to Business Central Migration
## Go-Live



## Cutover

Most typically cutover happens over a long weekend. The culmination is your Go-Live event. During cutover you can expect the following to occur:

- Adjustments to User Security
- Cutover Testing
- Final Data Import
- Reporting Finalization
- Schedule Any Automated Reporting
- Set Up Any Missing Users



## Go-Live

Early Monday morning the week of Go-Live is when we most commonly see the Go-Live event. This is simply when users quit entering transactions in GP & start entering transactions in Business Central. There is a lot of anticipation leading up to this event, but it passes quickly & if all goes as planned, it's business as usual.

**forvis mazars**

# Dynamics GP to Business Central Migration
## Post Go-Live



### The Forgotten Things

Regardless of the amount of preparation & planning put into an implementation, there is always a list of things that comes out of Go-Live that must be addressed. Some of these things happen same day & others can take some time to resolve. No matter the item, all things missed are fully documented & can be addressed.



### Support

Everyone is intimately familiar with the amount of support needed to successfully maintain a Dynamics GP environment. We are happy to report that the number of support incidents in Business Central is a fraction of that experienced in GP. There will be a time where you will quit engaging with your implementation team & go to Support if you have questions or issues that need to be addressed.



### Future System Improvements

After you have been live & running successfully, your account manager will reach out to discuss some of those future phase tasks that have been addressed yet. This will be your opportunity to queue up your business initiatives & address them in Business Central. This is the time where you push your business to that next level.

forvis mazars

# 03

## Your New World in Modern ERP

Gain a basic understanding of what
your new day-to-day looks like in
Business Central.

# Your New World in Modern ERP
## Transition Mindset

## Business Intelligence

In Dynamics GP, most organizations focus on producing financial reports. Business Intelligence goes above & beyond simple financials. You will be able to utilize advanced business intelligence to run your business & automate decision making with tools like:

- Advanced Financial Reporting
- Advanced Operational Reporting
- Budgeting
- Data Warehousing
- Reporting
- Dashboarding

## Dimensions

Dynamics GP relies on the antiquated segmented GL accounts. In modern ERP, the GL account is the natural segment. The other segments are handled via dimensions. This makes data entry & reporting more robust & allows for unparalleled growth.

Dimensions are not just limited to financial reporting though. You can use dimensions for all aspects of reporting, system wide.

## Workflow

In later versions of Dynamics GP, Microsoft put some effort into introducing workflow functionality. The workflow in GP met the most basic of requirements. Although each release of Dynamics GP introduced new workflow capabilities, there are many instances where the workflow in Dynamics GP didn't provide the functionality many organizations were looking for.

Business Central has a more robust & flexible workflow engine, enabling workflow scenarios to be handled within the system.

**forvis mazars**

# Your New World in Modern ERP
## Transition of Mindset

## Payroll

In Dynamics GP, you had the option of running your own payroll. Microsoft has taken Business Central in a different direction with no HR or Payroll functionality. You will have to rely on two different approaches to Payroll in Business Central:

1. ISV Solutions
2. Payroll Services

If you do decide on using payroll services, most major payroll providers already have established integrations with Business Central, saving you the task of creating GL entries for Payroll.

## Customizations

Microsoft technology changes eliminated .net customizations from Dynamics GP a few years ago. Dexterity customizations were an alternative approach but those required specialized development skills. In Business Central, customizations can be handled many ways. The main difference is that the customizations lay on top of the source/base code. This helps upgrades & system maintenance go significantly smoother than what most organizations are used to with Dynamics GP.

## ISV Solutions

In Dynamics GP, if you needed to use an ISV solution, you had to go through a sales cycle & contact the ISV directly, or through your technology partner. In Business Central, you can find ISV solutions in the Market Place. Once you or your technology partner identify a solution you're interested in, installation will be coordinated along with any implementation tasks. This cuts the implementation time significantly & gives the power to the end users in their own environment. You no longer need a consultant with years of development experience to find a solution for you, now your consultant can simply serve as an advisor who advocates for you.

**forvis mazars**

# 04

## Benefits of Business Central Over Other Modern ERP Platforms

How does Business Central stack up in comparison to other modern ERP platforms?

# Benefits of Business Central Over Other Modern ERP Platforms
## The Microsoft Stack

Dynamics 365 Business Central provides a **fully integrated stack**, on Microsoft's **trusted & inclusive cloud**.



Microsoft Dynamics 365 Business Central

Microsoft 365

Developer Tools

Power Platform

Microsoft Azure

Identity, security, management, & compliance

forvis mazars
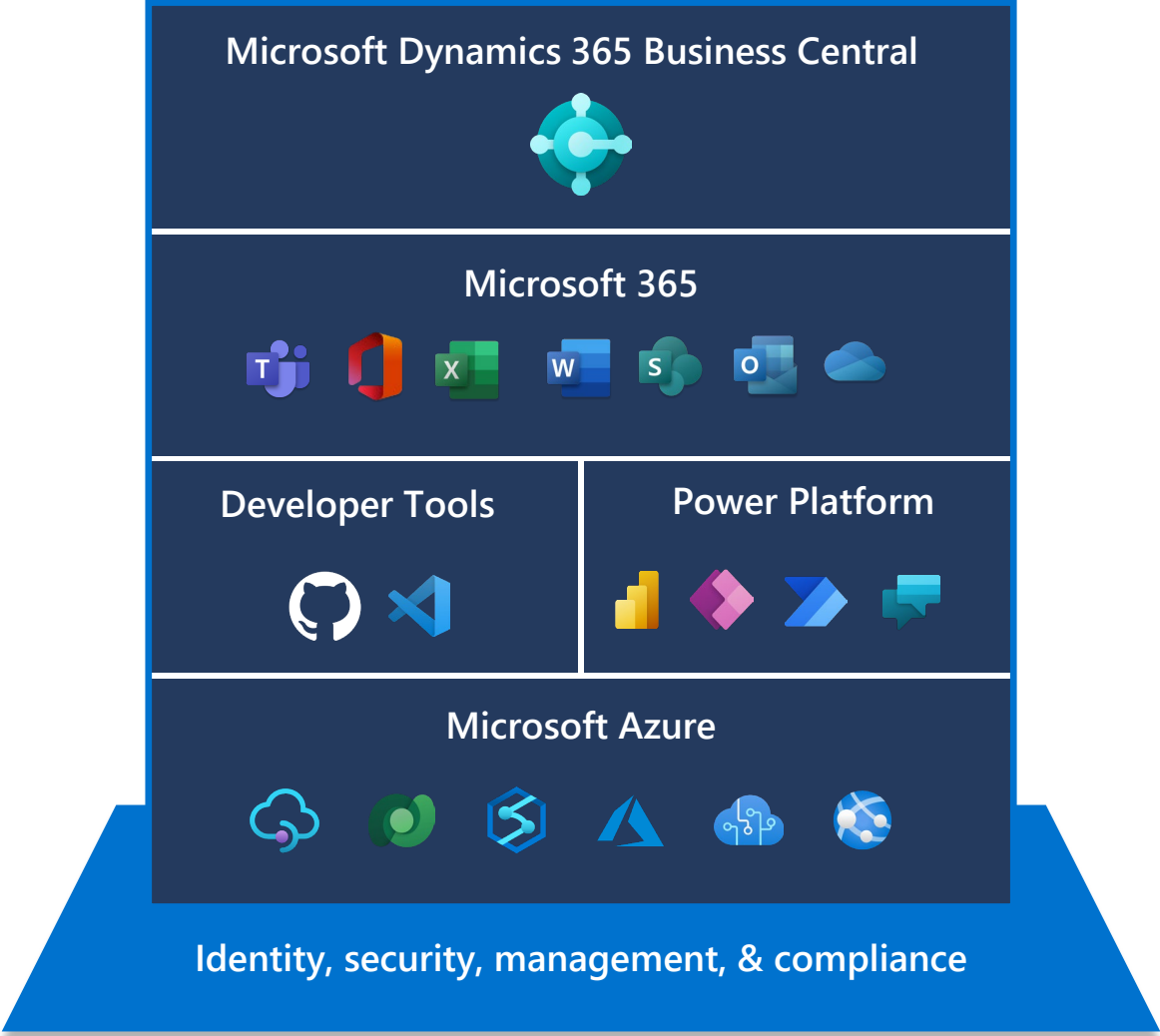
# Benefits of Business Central Over Other Modern ERP Platforms
## Fully Integrated Business Intelligence

Connect finance, sales, service, & operations teams with an inclusive business management solution trusted by over 30,000 small & midsize businesses.



Financial Management

Project Management

Sales Management

**Reporting & Business Insights**

Operations Management

Service Management

Supply Chain Management

**forvis mazars**

# Benefits of Business Central Over Other Modern ERP Platforms
## BC vs. Other Solutions

## Business Central

**Publisher**

**Microsoft**

**Cost**

$ $ $ $

**Functionality**

| | |
|---|---|
| BI & Reporting | Integrations |
| CRM | Manufacturing |
| Finance | Projects |
| HR & Payroll | Supply Chain |

**Implementations**

**30,000+**

**Deployment**

**Business Size**

S  M  L

## NetSuite

**Publisher**

**Oracle**

**Cost**

$ $ $ $

**Functionality**

| | |
|---|---|
| BI & Reporting | Integrations |
| CRM | Manufacturing |
| Finance | Projects |
| HR & Payroll | Supply Chain |

**Implementations**

**36,000+**

**Deployment**

**Business Size**

S  M  L

## Sage Intacct

**Publisher**

**Sage**

**Cost**

$ $ $ $

**Functionality**

| | |
|---|---|
| BI & Reporting | Integrations |
| CRM | Manufacturing |
| Finance | Projects |
| HR & Payroll | Supply Chain |

**Implementations**

**26,000+**

**Deployment**

**Business Size**

S  M  L

## Acumatica

**Publisher**

**Acumatica**

**Cost**

$ $ $ $

**Functionality**

| | |
|---|---|
| BI & Reporting | Integrations |
| CRM | Manufacturing |
| Finance | Projects |
| HR & Payroll | Supply Chain |

**Implementations**

**10,000+**

**Deployment**

**Business Size**

S  M  L

## Key

SaaS     On-Prem     SaaS or On-Prem

Your Dynamics GP Road Map: Exploring Business Central

forvis mazars

# Benefits of Business Central Over Other Modern ERP Platforms
## Why Choose Business Central?

Microsoft is a **trusted leader** in business applications & low-code solutions.

Microsoft Dynamics 365

Microsoft Power Platform

**97%** of Fortune 500 companies choose Dynamics 365 or Power Platform

**500K** organizations use Dynamics 365 & Power Platform every month

**40K+** customers use Copilot features in Dynamics 365 or Power Platform

**30** year history of enhancing & redefining CRM & ERP solutions

forvis mazars

# 05
## Next Steps

Once you've decided you're ready to take the next step in your migration from Dynamics GP to Business Central, what happens next?

# Next Steps
## Keys for a Successful Transition



### Communication

Making the decision to move away from Dynamics GP takes courage. Now that you've decided to take this big step, communicate this decision with your technology partner. Let them advocate for you & help you put a plan together that makes sense for your organization.



### Assessment

Use an assessment to achieve a few goals:

- Confirm your selection of Business Central
- Understand your business processes
- Get leadership & end user buy-in
- Understand the cost of an implementation



### Revolutionize Your Business

Once you are live in Business Central, let automation & analytics help drive your business. Shift your focus to long-term growth, employee empowerment, & customer satisfaction. Don't be the company that gets stuck in the routine of processing data while your competitors experience enhanced efficiency & growth.

**forvis mazars**

# Next Steps
## Microsoft Incentives for a Dynamics GP to Business Central Migration



### Assessment Cost Offset

Microsoft has committed to help offset the cost of ERP assessments for clients. Microsoft Partners will work with Microsoft to offset assessment costs. Business Technology Services at Forvis Mazars is providing free assessments for GP customers for a limited time. Contact us to learn more.



### 1-Year Licensing Discount

If you migrate from Dynamics GP to Business Central & commit to a 1-year Business Central license, Microsoft is offering a 10% discount on each user license.
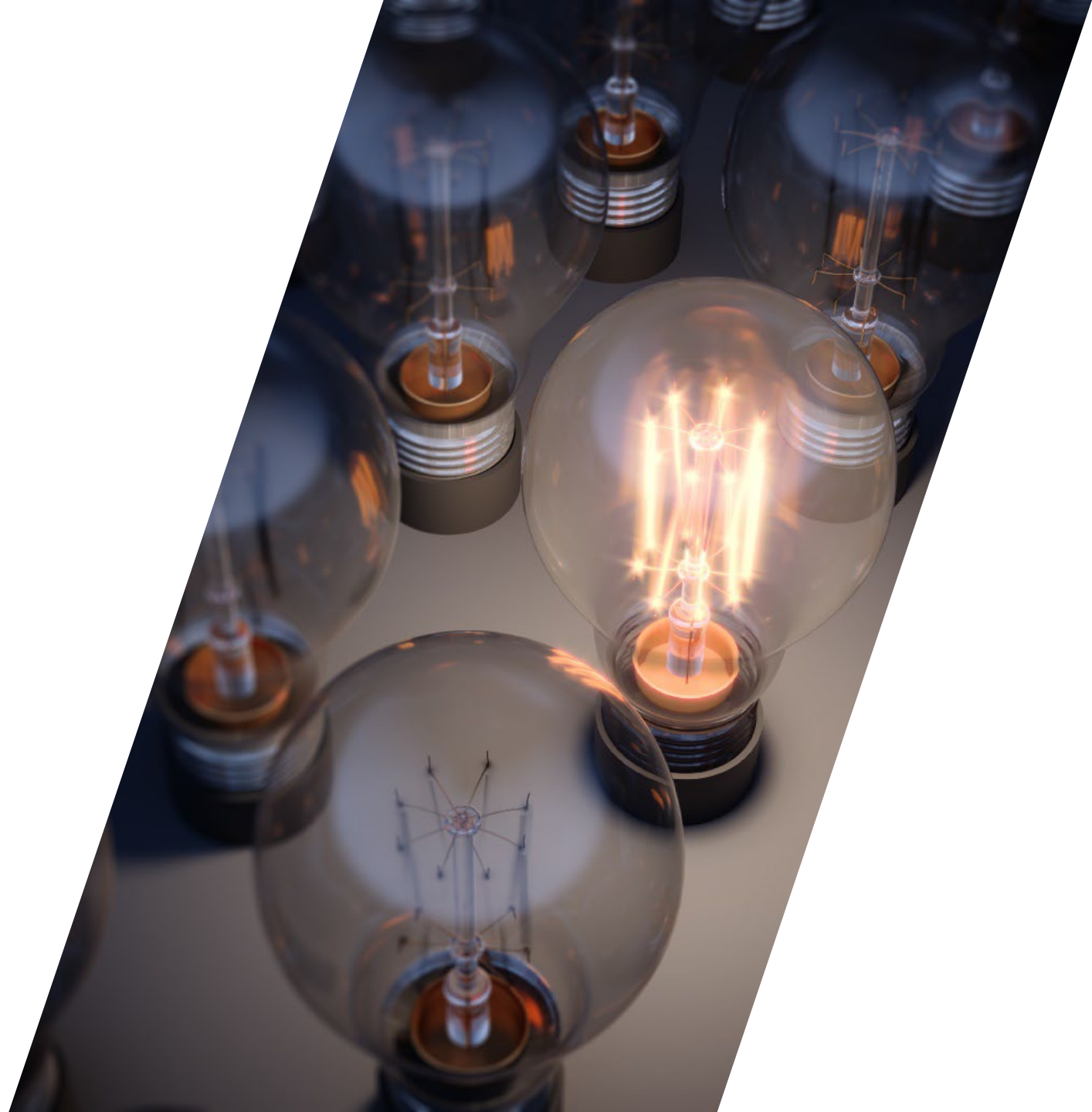


### 3-Year Licensing Discount

If you migrate from Dynamics GP to Business Central & commit to a 3-year Business Central license, Microsoft is offering a 40% discount on each user license.

**forvis mazars**

# 06
## Conclusion

Summarizing what we've covered.

# Conclusion
## Planning Your Business Central Migration





## Understand Your Current Situation

Microsoft has made it clear that the future of their small & midsize ERP solution is Dynamics 365 Business Central. There are so many GP clients that will have to make a move to a new ERP within the next few years. If GP clients are not selective on when they make the move, there may be more clients trying to transition than there are technology partners to complete the implementations. If you are current today & have plans to continue installing year-end releases, the longevity of your system is better than most. If you are on GP 2016 R2 or earlier, now is the time to start the transition process.

## Plan for Your Future

Let your migration to Business Central be one that moves your business to the next level.

- Address your wants & needs that GP doesn't deliver today
- Create new employee roles
- Embrace business intelligence & dashboards
- Introduce AI with Copilot
- Make automation a priority
- Take the opportunity to cross-train & reduce information silos

**forvis mazars**

# Conclusion
## Migrating to Business Central





## Don't Get Left Behind

The business technology ecosystem is flooded with clients using antiquated ERP technology. As the transition to Business Central becomes more popular, the volume of migrations will quickly over saturate the Microsoft Partner community. Get in early to get it right! The total number of clients running antiquated solutions or undersized solutions is approximately, per 2023 data:

- Microsoft Dynamics GP – 47,000 Companies
- Microsoft Dynamics NAV – 110,000 Companies
- Microsoft Dynamics SL – 13,500 Companies
- QuickBooks – 29,000,000 Companies
  - Small Companies: 17,980,000
  - Midsize Companies: 8,990,000
  - Large Companies: 2,030,000
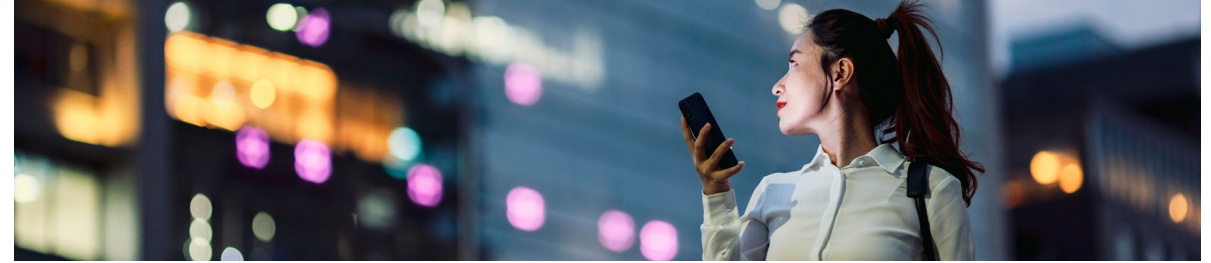
## Let Us Help!

Forvis Mazars has a robust assessment process. We are actively scheduling assessments & delivering results weekly. Forvis Mazars has an experienced Dynamics GP team with more than 100 years of combined experience. We can easily understand where you are now & where you need to go. The Dynamics GP team at Forvis Mazars is cross-trained in Business Central, helping you make the migration successfully.

If you are not confident in your technology partner's capabilities or do not have a clear vision for how you go from Dynamics GP to Business Central, let's start a conversation today. We are committed to your digital transformation journey. We listen to understand & consult with purpose—that's our **Unmatched Client Experience**®.

**forvis mazars**

# Q&A

**Business Technology Services**

## Questions?

Your Dynamics GP Road Map: Exploring Business Central

forvis mazars

# Contact

**Forvis Mazars**



**Jason Layne**

Manager

Business Development Executive

jason.layne@us.forvismazars.com



**Jeremy Adkins-Hill**

Manager

Consulting

jeremy.adkinshill@us.forvismazars.com

The information set forth in this presentation contains the analysis and conclusions of the author(s) based upon his/her/their research and analysis of industry information and legal authorities. Such analysis and conclusions should not be deemed opinions or conclusions by Forvis Mazars or the author(s) as to any individual situation as situations are fact-specific. The reader should perform their own analysis and form their own conclusions regarding any specific situation. Further, the author(s)' conclusions may be revised without notice with or without changes in industry information and legal authorities.

Microsoft
Partner

forvis
mazars