BUSINESS TECHNOLOGY SUMMIT 2024

End-to-End Efficiency: Migrating to Cloud ERP for Comprehensive Process Improvement

Housekeeping

- Please silence your phones. If you need to take a call, feel free to step outside and come back in.
- Sessions are being recorded and will be available after.
- Please use this QR code to take the session survey before heading to the next session.
- Survey responses get you more entries into the raffle at the end of the day. (prizes included surface headphones, Smart Ray Bans, RayBan Meta Smart Bluetooth Glasses, and lots more).
- Wifi Info: BusinessTechnologySummit

Pasword: journeyteam!

Presenter

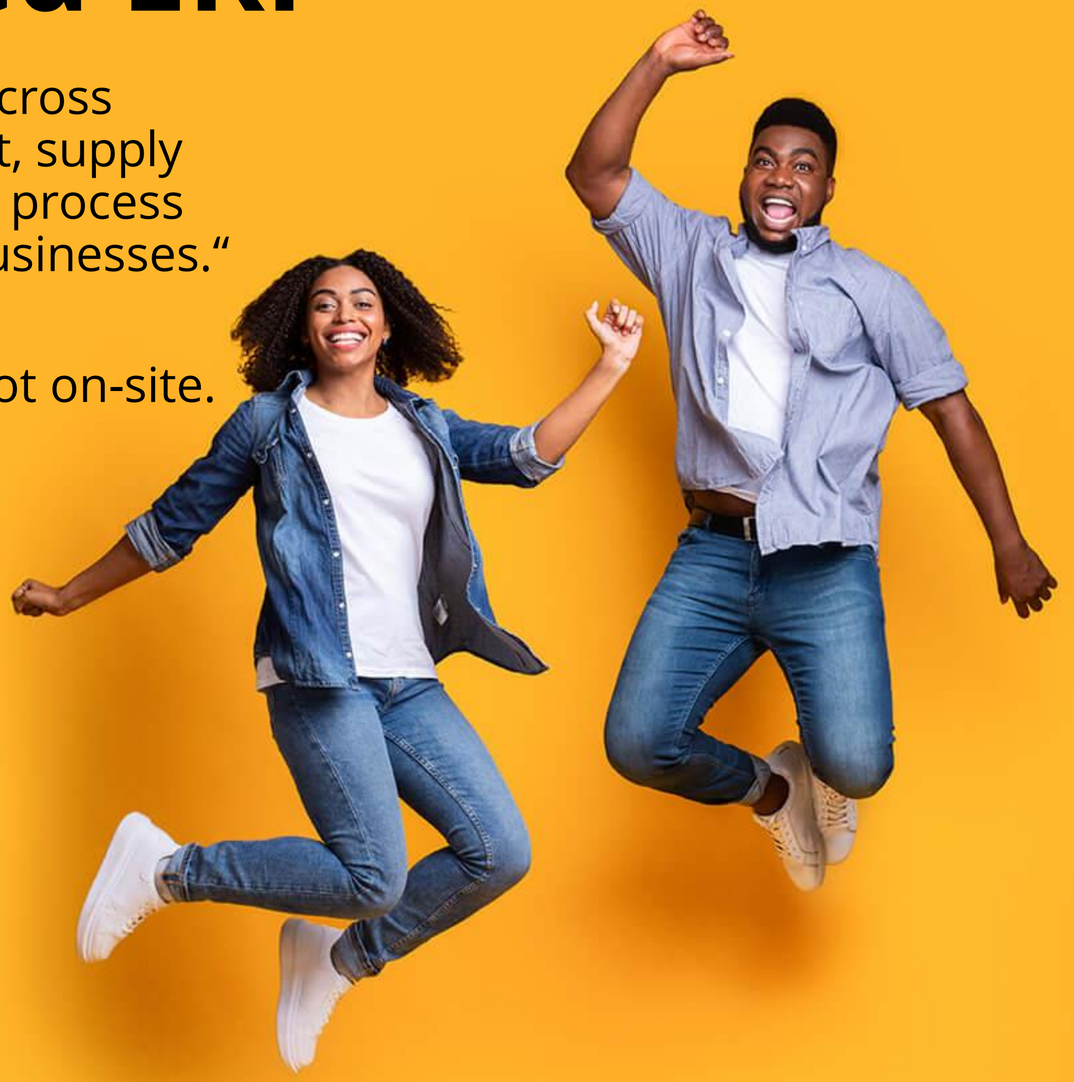
CECILEE NELSON
PRINCIPAL SOLUTION ARCHITECT I

What is Cloud Based ERP

"ERP systems streamline operations across finance, inventory, order management, supply chain, and more, resulting in business process enhancements for 95% of adopting businesses.“

Cloud-based ERP: Accessible online, not on-site.

- Hosting(Vendors host on-premises software)
- SaaS(multitenant)



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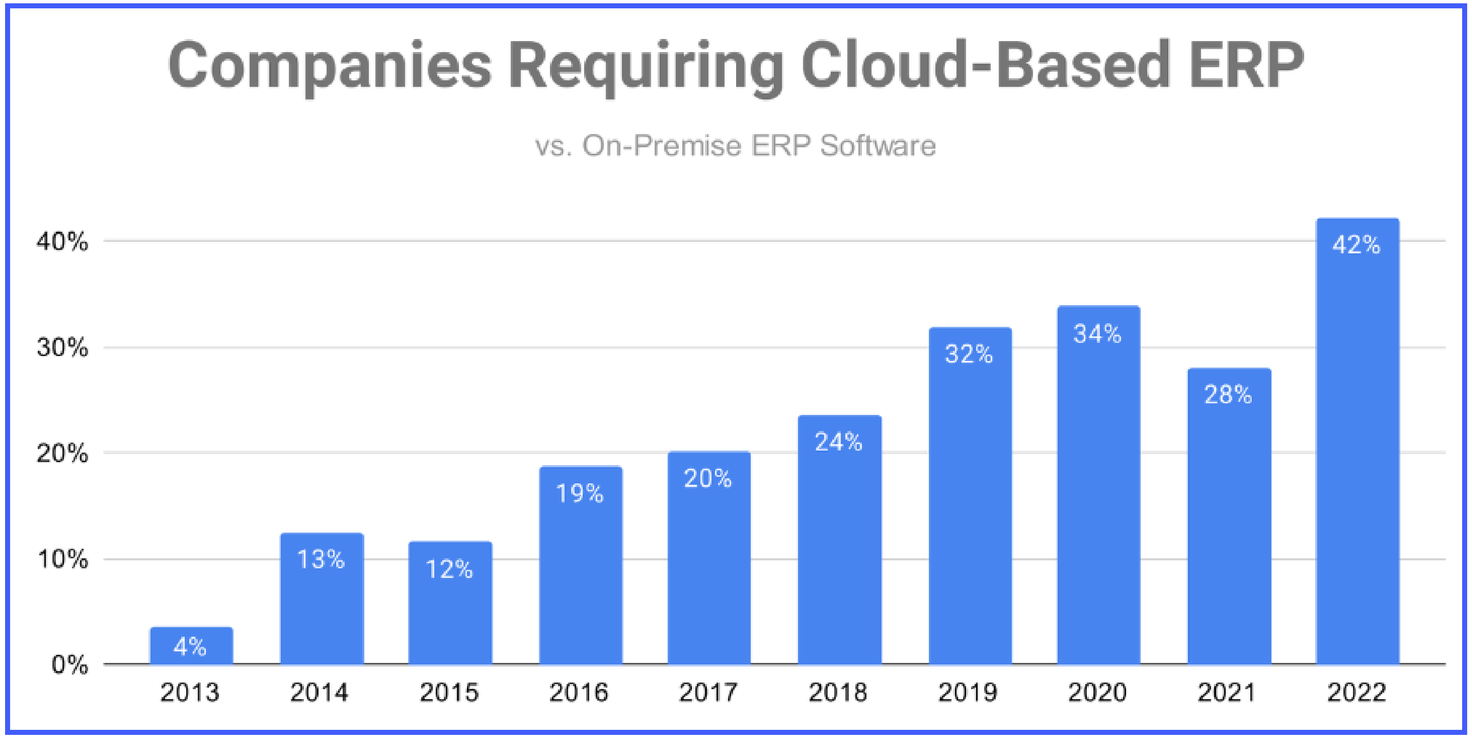
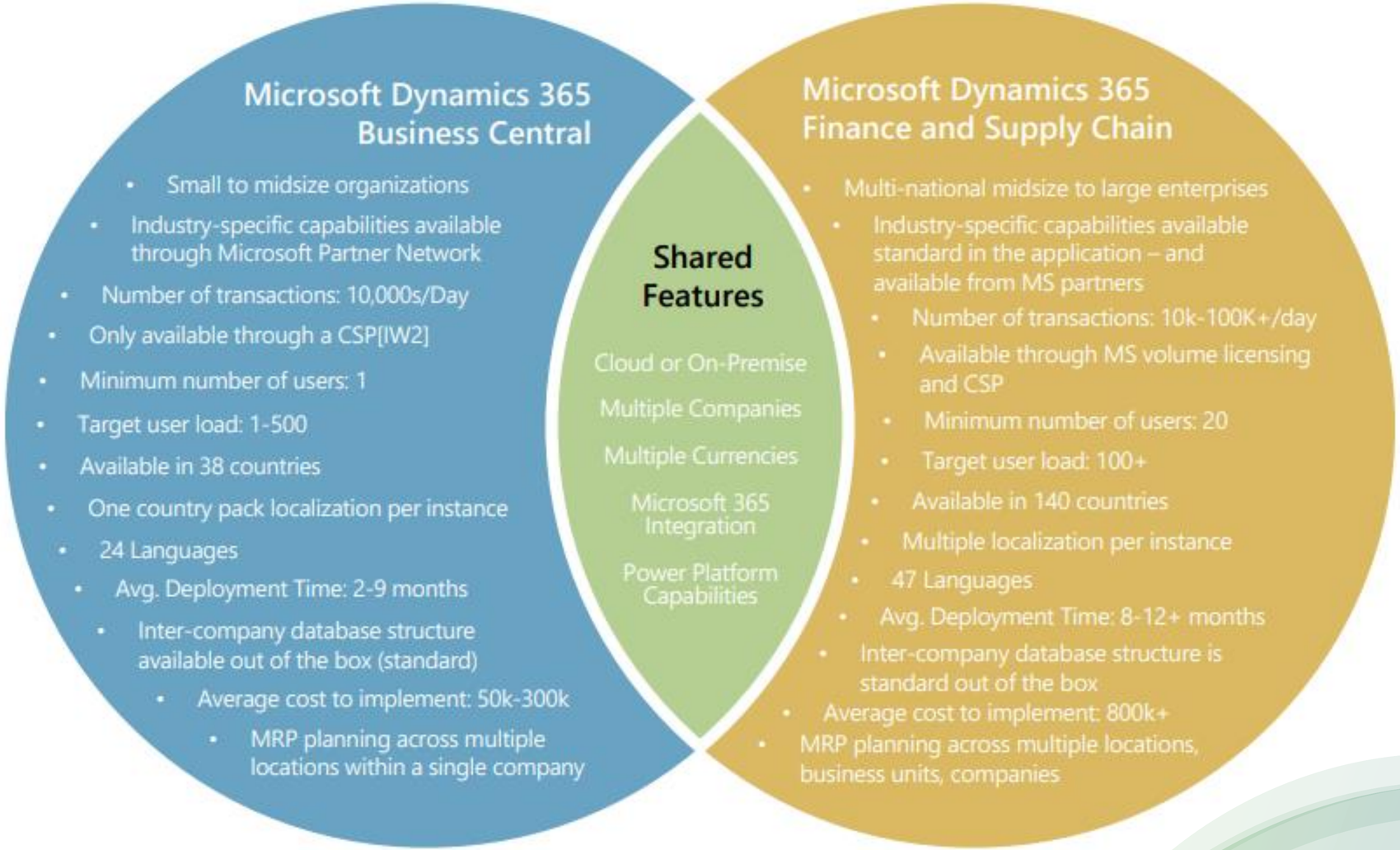
Benefits of a Cloud Based ERP System

- Cost-Effective
  - Implementation
  - Maintenance
  - Upgrades(New Technology)
- Security
  - Simplified compliance
  - Data Recovery
- Accessibility
  - Real time data
  - Mobile access
  - No VPN
- Scalability

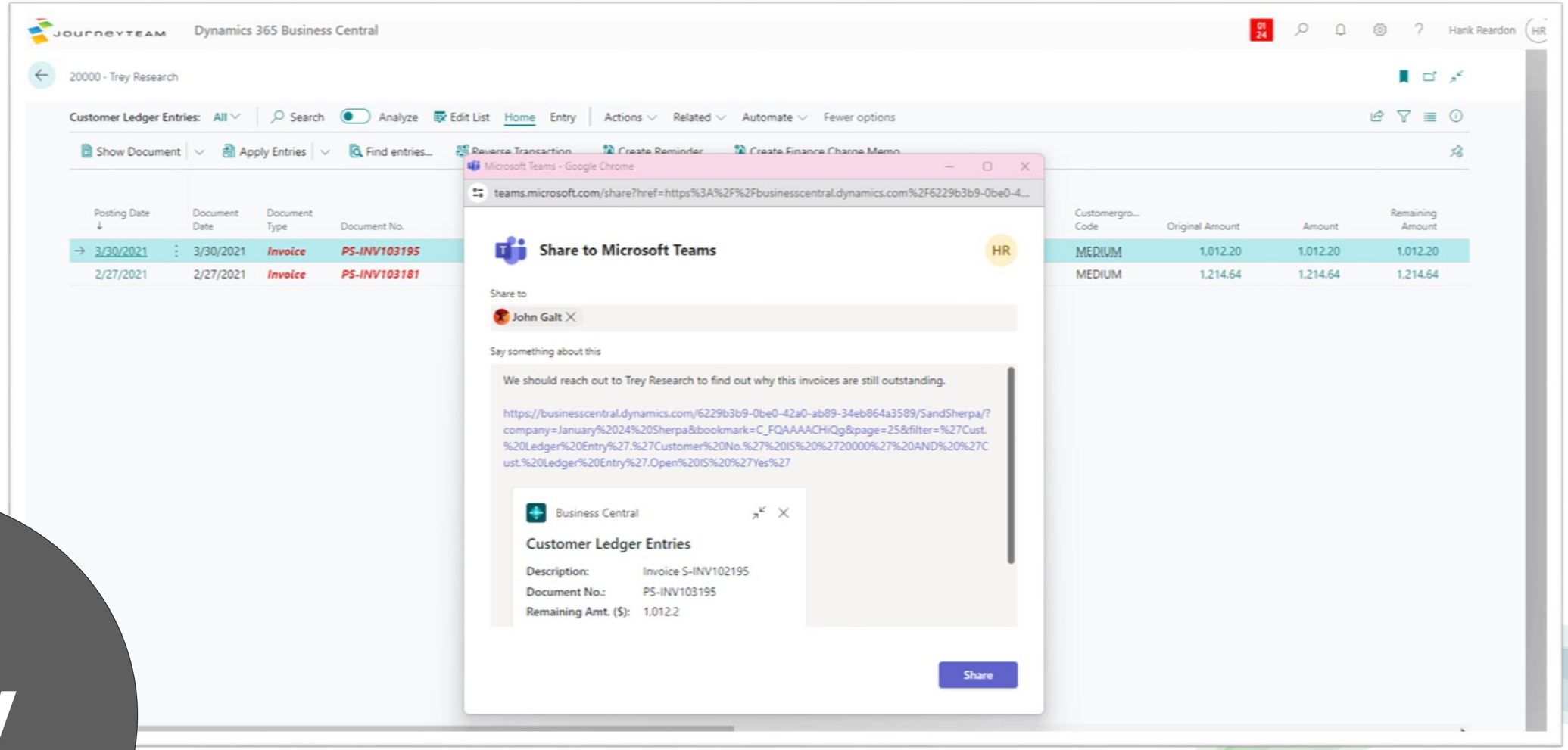
Why Cloud ERP



What

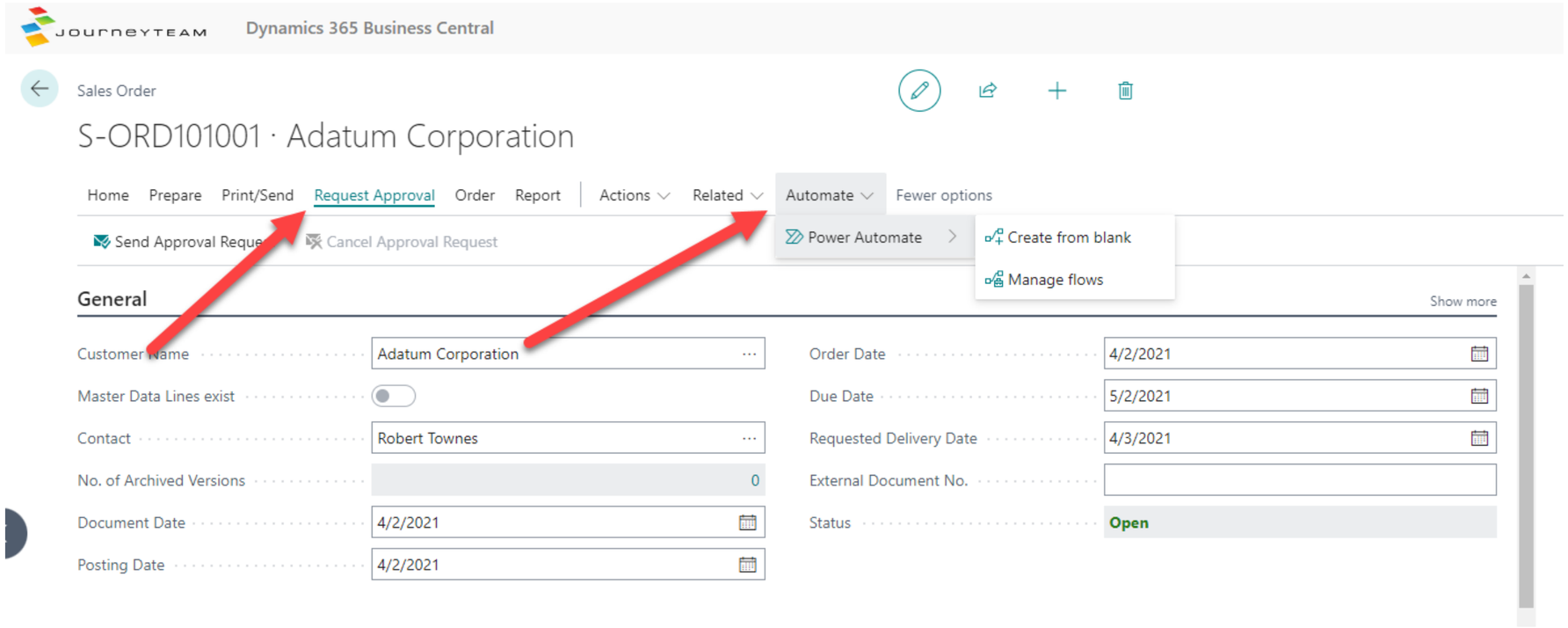

Microsoft Dynamics 365 Business Central
Small to midsize organizations
Industry-specific capabilities available through Microsoft Partner Network
Number of transactions: 10,000s/Day
Only available through a CSP[IW2]
Minimum number of users: 1
Target user load: 1-500
Available in 38 countries
One country pack localization per instance
24 Languages
Avg. Deployment Time: 2-9 months
Inter-company database structure available out of the box (standard)
Average cost to implement: 50k-300k
MRP planning across multiple locations within a single company
Shared Features
Cloud or On-Premise
Multiple Companies
Multiple Currencies
Microsoft 365 Integration
Power Platform Capabilities
Microsoft Dynamics 365 Finance and Supply Chain
Multi-national midsize to large enterprises
Industry-specific capabilities available standard in the application – and available from MS partners
Number of transactions: 10k-100K+/day
Available through MS volume licensing and CSP
Minimum number of users: 20
Target user load: 100+
Available in 140 countries
Multiple localization per instance
47 Languages
Avg. Deployment Time: 8-12+ months
Inter-company database structure is standard out of the box
Average cost to implement: 800k+
MRP planning across multiple locations, business units, companies

Boost productivity



Why

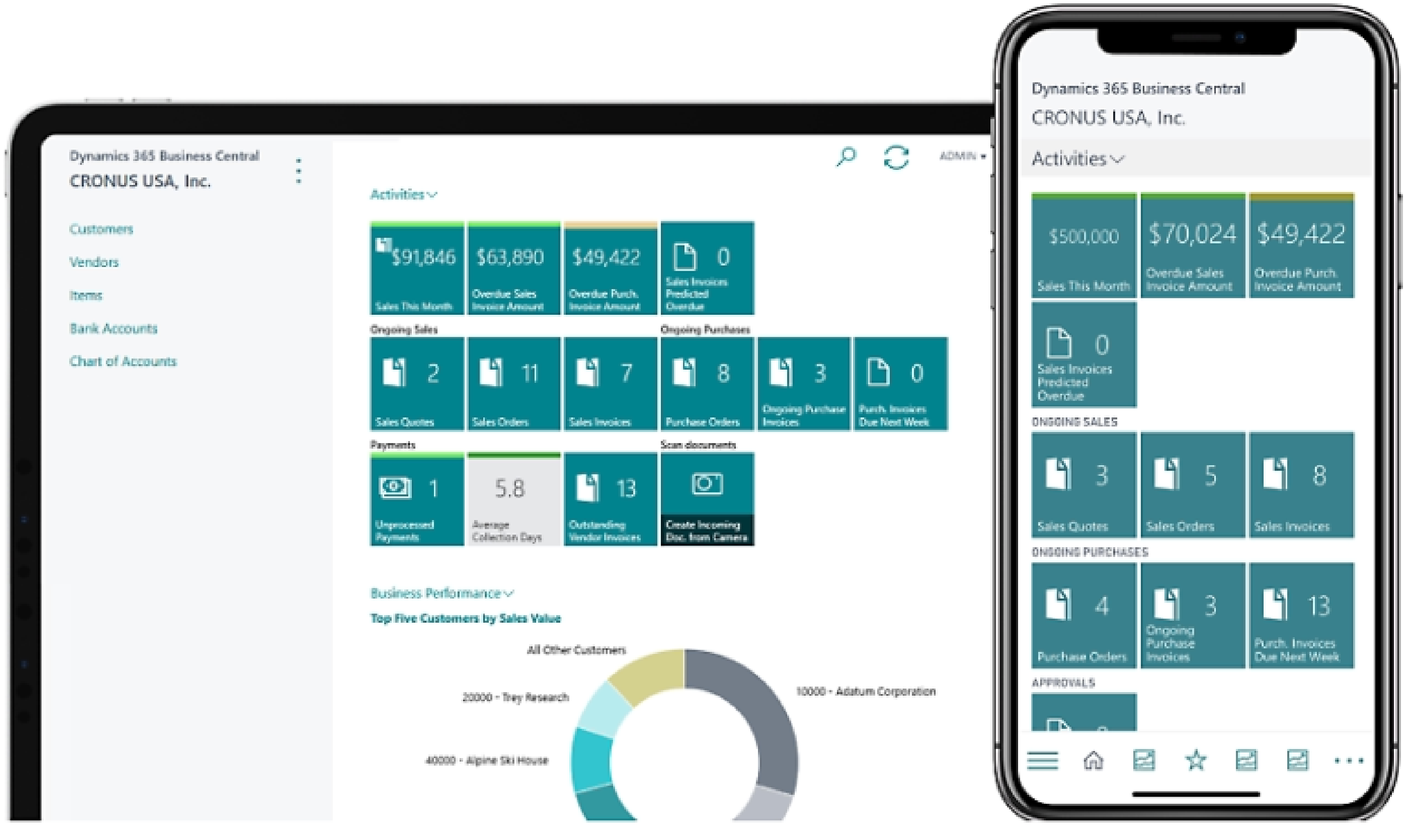
Automate and improve processes



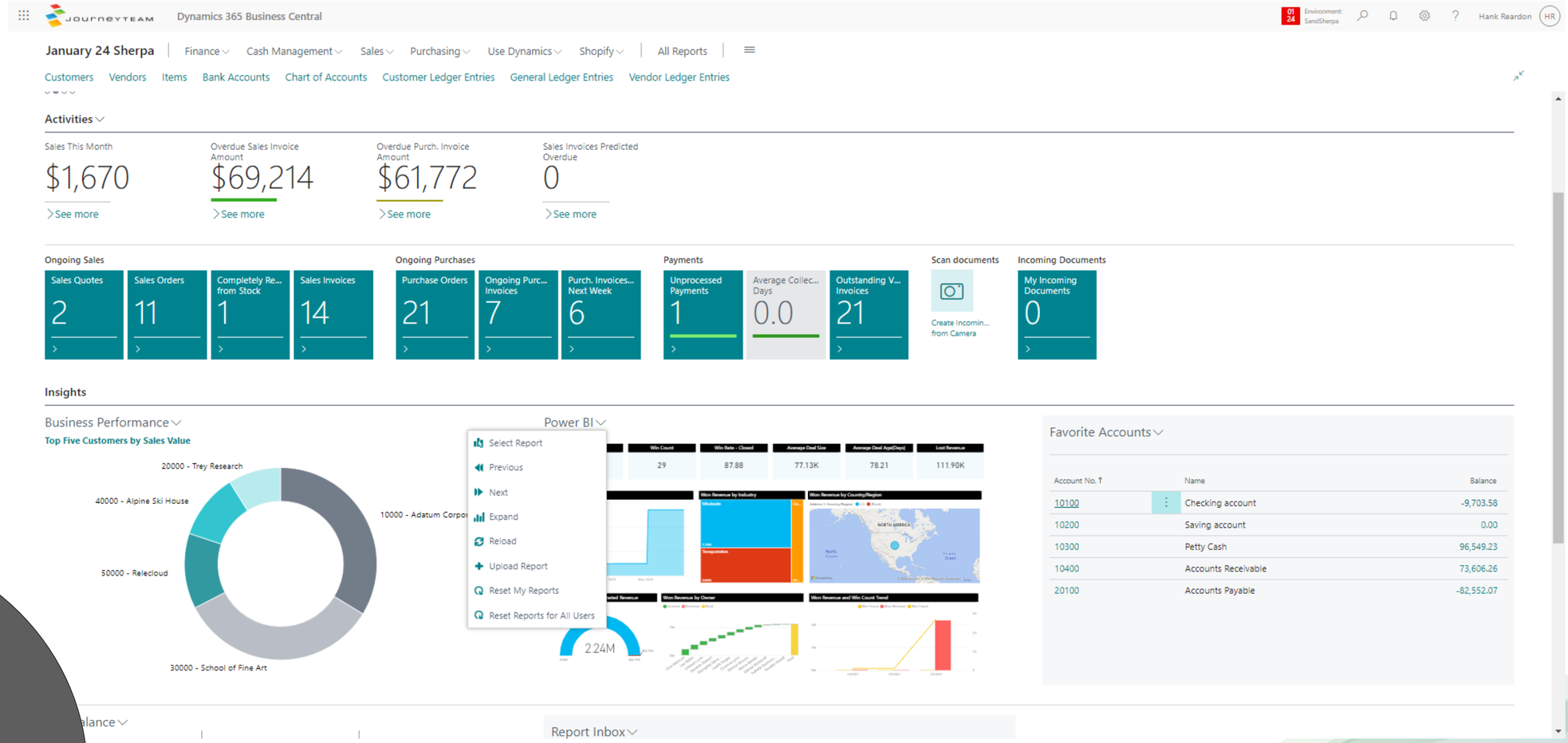
Why

Get World-class Security and Compliance

Why



Make data-driven decisions



Why

How

- White glove
- Sherpa
- Catalyst

White Glove Projects

Deep discovery to capture best processes

1:1 Workshops catered to your company needs

Optional Change Management

Personal Teams Site with workshop documentation, recorded session and collaboration data

Project Team of Project Manager, Project Lead, Specialized Associate, and Developer as needed

Sherpa Services

16 Live Workshops
Delivered Over 8 Weeks

Group Open Office Hours

Discovery

Initial Setup and additional configuration or support
(4 hours)

Monitored Team Communications

Administration

Introduction to Business Central/Teams

Core Accounting

Accounting Setup

Posting Groups

G/L transactions

Banking and Cash transactions

Fixed Assets

Financial Reporting & Budgeting

Purchasing & AP

Purchase & Payables Setup

Purchase transactions

Payment Application (combined with Sales)

Sales & AR

Sales & Accounts Receivables Setup

Sales transactions

Payment application (combined with purchasing)

Core Inventory

Inventory – Item card setup

Inventory Transactions

Technical

Workflows and approvals/ Users & Security

Configuration Packs/Edit in Excel

Go-live Cutover Preparation

Catalyst Services

Option to attend: 16 Live Workshops

Delivered Over 8 Weeks

Group audience

Group Open Office Hours

1 hour discovery session with Sherpa Lead

Extensions Included:

Document Customizer(Abakion)

Master Data Information (Abakion)

Document handling (Abakion)

Page Extender (JourneyTEAM)

RePay AP Processing

Basic setup of Business Central including: *(Chart of Accounts, G/L categories, Posting Group Setups, Location setup, Warehouse setup,)*

Preconfigured documents for Sales, Purchasing, and warehouse.

Catalyst Level 1 Support Plan

Catalyst Package Options

Finance Package

Perfect for those prioritizing finance and reporting capabilities, this package supports the creation of sales quotes, invoices, and purchase orders while utilizing bank feeds, reporting, and Microsoft Outlook and Excel.

- Training resources, including videos and live consultants.
- Monthly system reviews.
- Financial and month-end reporting.
- Comprehensive general ledger, accounts receivable, and accounts payable management.

Finance + Warehouse package

Ideal for those who need more than reporting and finance, such as inventory capabilities and integration with Shopify or other commerce platforms. Includes everything in the Finance package plus:

- Price lists and discounts
- Inventory management with links to general ledger and goods received not invoiced reporting
- Commerce platform integration

Finance + Assembly package

This package is best suited for those who require enhance functionality including assemble or manufacturing needs. It includes everything in the Finance + Warehouse package, plus:

- Assembly kits
- Assembly orders

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Demo

Experience the Business Central difference

Be ready for growth

Support your business now and as it grows with the industry-leading reliability, scalability, and performance of the Microsoft Cloud.

Take your business on the go

Work anywhere with full capabilities on desktop, tablet, or mobile across Windows, macOS, Android, and iOS devices.

Rapidly deploy and onboard

Implement in weeks and get users started quickly with role-based dashboards, 200-plus training courses, content-aware help, and guided tours.

Available worldwide

Use Business Central in 47 languages and in over 160 countries and regions to expand your business globally.

See availability

Work smarter with Copilot

Copilot for Dynamics 365 uses natural language technology to create AI-powered experiences that help you speed up repetitive tasks and unlock creativity.

Learn more

Easily tailor with prebuilt apps

Extend Business Central with industry-specific apps and extensions to meet your unique vertical or business requirements.

Browse Microsoft AppSource

Collaborate in Microsoft Teams

Improve collaboration with read-only access to Business Central data with a Microsoft 365 license—no additional charge.

Streamline with custom workflows

Enhance productivity with built-in workflow templates—or build your own—using the embedded Microsoft Power Automate experience.

Connect with existing systems

Take advantage of open architecture to combine Business Central with systems you already use, such as payroll.

We love feedback!

Please complete the session survey for **an extra giveaway raffle ticket!**

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Thank You!

Let’s Connect:

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