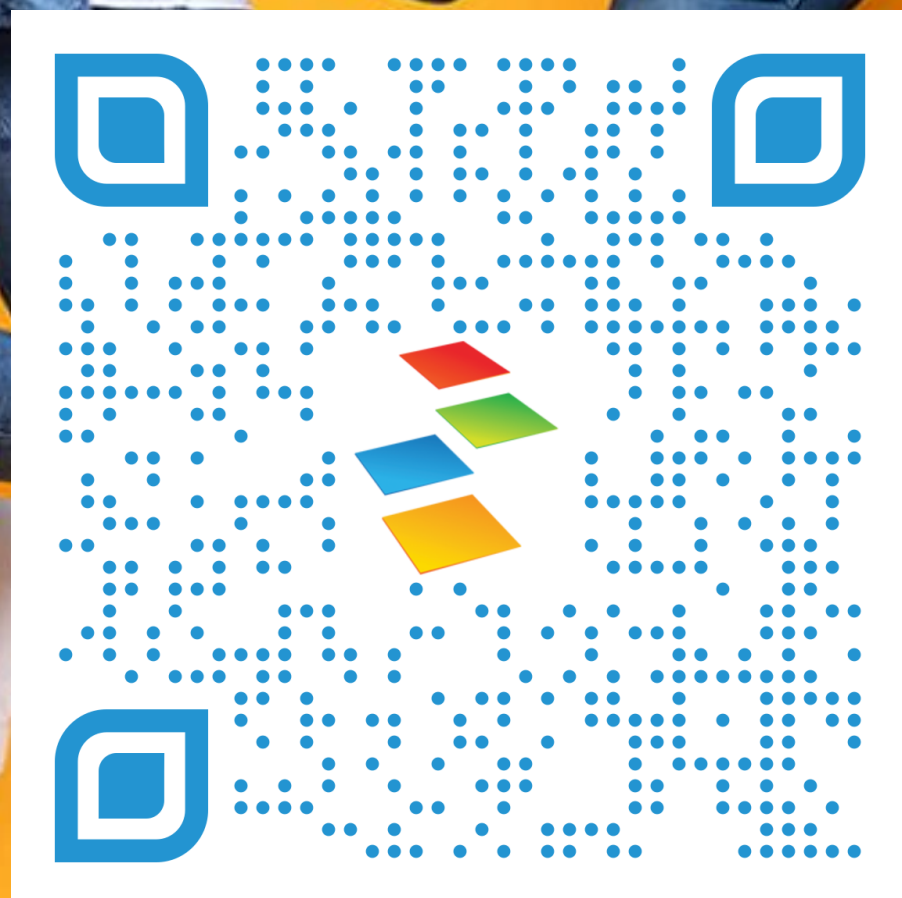




# End-to-End Efficiency: Migrating to Cloud ERP for Comprehensive Process Improvement







# 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  
Password: journeyteam!





# Presenter



**CECILEE NELSON**  
PRINCIPAL SOLUTION ARCHITECT I

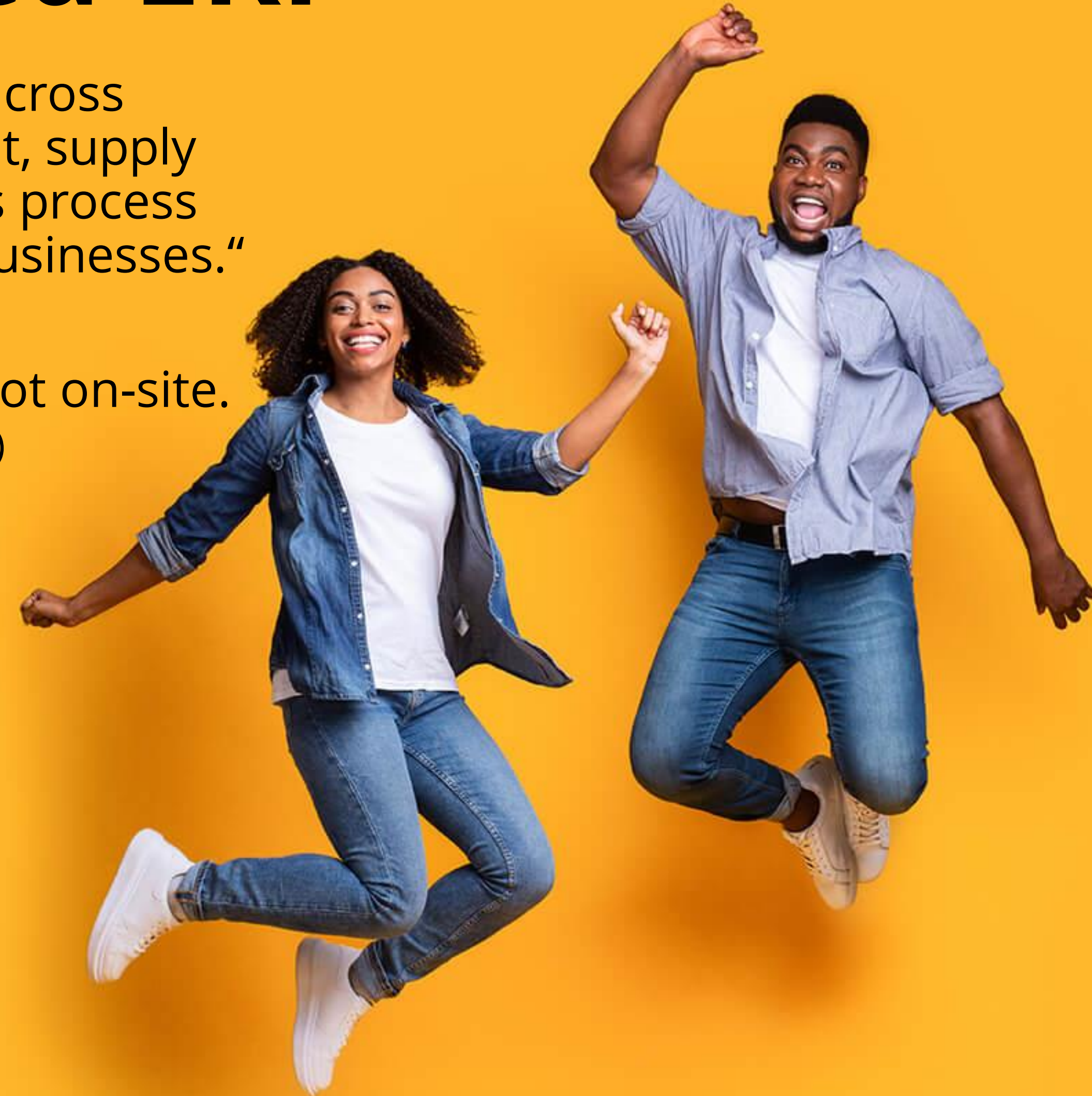


# What is Cloud Based ERP

"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)







# 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

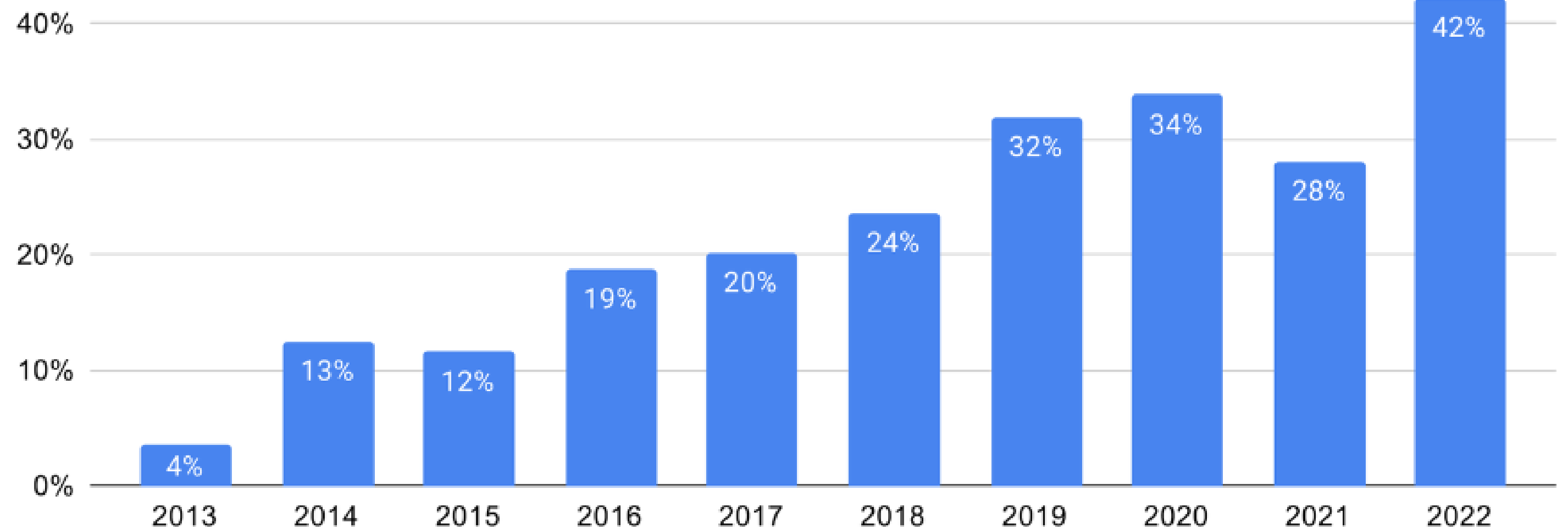




# Why Cloud ERP

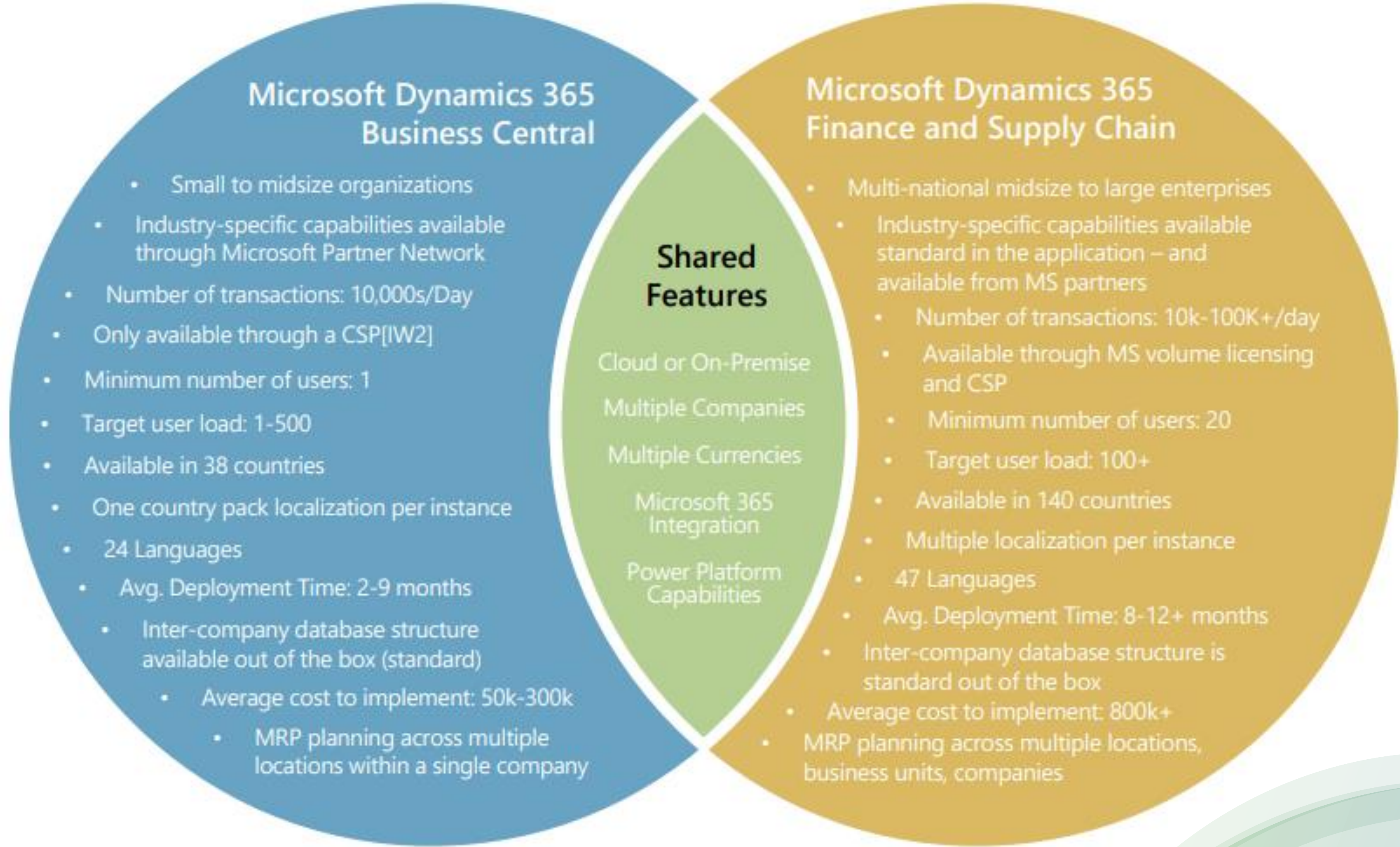
## Companies Requiring Cloud-Based ERP

vs. On-Premise ERP Software





# What





# Boost productivity

The screenshot displays the Dynamics 365 Business Central interface. The main window shows a table of 'Customer Ledger Entries' for 'Trey Research'. A 'Share to Microsoft Teams' dialog box is open, sharing a link to a specific invoice entry. The dialog includes a text area with a message and a 'Share' button.

Posting Date	Document Date	Document Type	Document No.
3/30/2021	3/30/2021	Invoice	PS-INV103195
2/27/2021	2/27/2021	Invoice	PS-INV103181

Customergro... Code	Original Amount	Amount	Remaining Amount
MEDIUM	1,012.20	1,012.20	1,012.20
MEDIUM	1,214.64	1,214.64	1,214.64

**Share to Microsoft Teams**

Share to: John Galt

Say something about this

We should reach out to Trey Research to find out why this invoices are still outstanding.

[https://businesscentral.dynamics.com/6229b3b9-0be0-42a0-ab89-34eb864a3589/SandSherpa/?company=January%2024%20Sherpa&bookmark=C\\_FQAAAACHiQg&page=25&filter=%27Cust.%20Ledger%20Entry%27.%27Customer%20No.%27%20IS%20%2720000%27%20AND%20%27Cust.%20Ledger%20Entry%27.Open%20IS%20%27Yes%27](https://businesscentral.dynamics.com/6229b3b9-0be0-42a0-ab89-34eb864a3589/SandSherpa/?company=January%2024%20Sherpa&bookmark=C_FQAAAACHiQg&page=25&filter=%27Cust.%20Ledger%20Entry%27.%27Customer%20No.%27%20IS%20%2720000%27%20AND%20%27Cust.%20Ledger%20Entry%27.Open%20IS%20%27Yes%27)

Business Central

**Customer Ledger Entries**

Description: Invoice S-INV102195  
Document No.: PS-INV103195  
Remaining Amt. (\$): 1,012.2

Share

Why



# Automate and improve processes

JOURNEYTEAM Dynamics 365 Business Central

Sales Order S-ORD101001 · Adatum Corporation

Home Prepare Print/Send **Request Approval** Order Report Actions Related Automate Fewer options

Send Approval Request Cancel Approval Request

Power Automate Create from blank Manage flows

**General** Show more

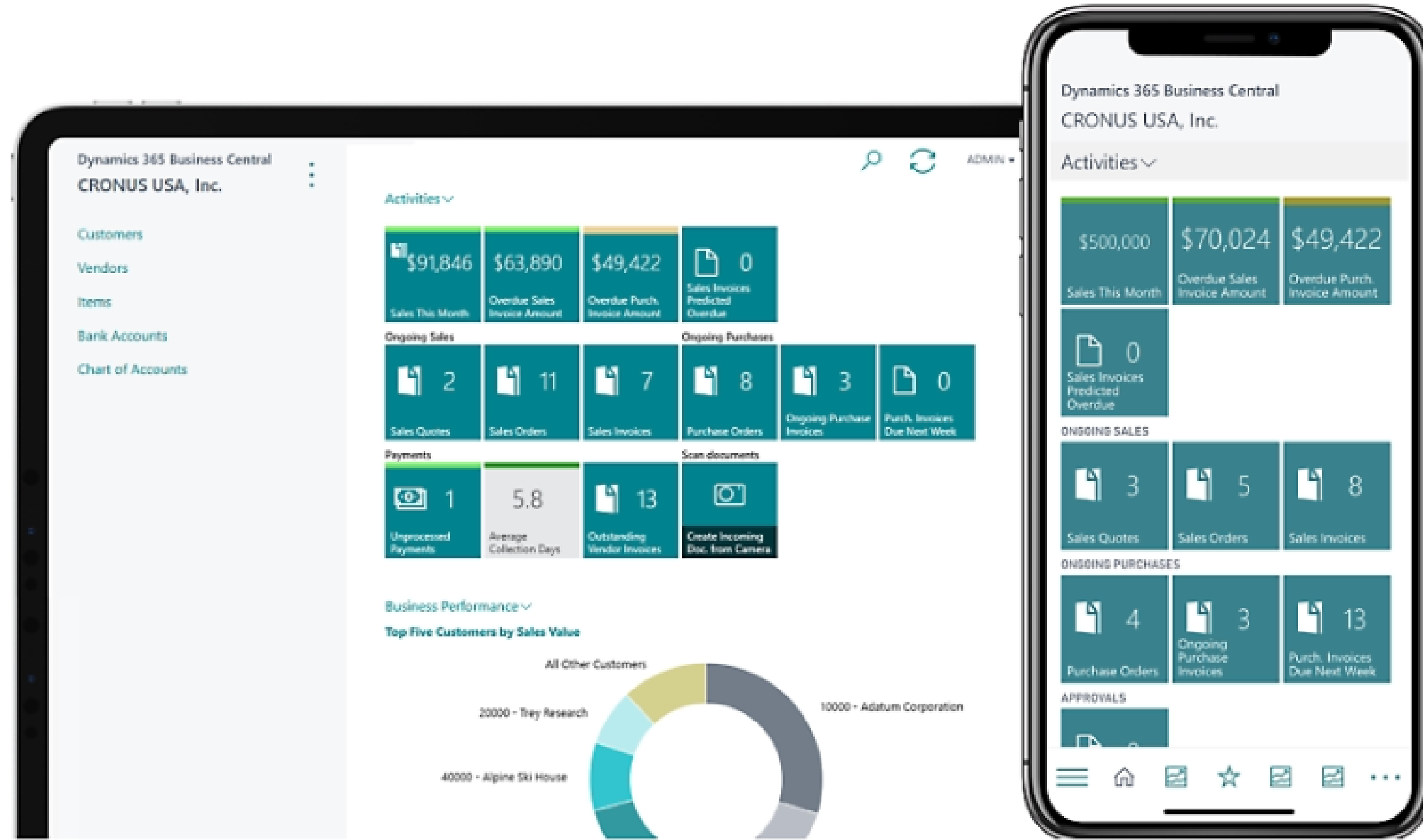
Customer Name	Adatum Corporation	Order Date	4/2/2021
Master Data Lines exist	<input type="checkbox"/>	Due Date	5/2/2021
Contact	Robert Townes	Requested Delivery Date	4/3/2021
No. of Archived Versions	0	External Document No.	
Document Date	4/2/2021	Status	Open
Posting Date	4/2/2021		

Why



# Get World-class Security and Compliance

Why





# Make data-driven decisions

**January 24 Sherpa** | Finance | Cash Management | Sales | Purchasing | Use Dynamics | Shopify | All Reports

Customers | Vendors | Items | Bank Accounts | Chart of Accounts | Customer Ledger Entries | General Ledger Entries | Vendor Ledger Entries

**Activities**

- Sales This Month: **\$1,670** >See more
- Overdue Sales Invoice Amount: **\$69,214** >See more
- Overdue Purch. Invoice Amount: **\$61,772** >See more
- Sales Invoices Predicted Overdue: **0** >See more

**Ongoing Sales**

- Sales Quotes: **2**
- Sales Orders: **11**
- Completely Re... from Stock: **1**
- Sales Invoices: **14**

**Ongoing Purchases**

- Purchase Orders: **21**
- Ongoing Purch... Invoices: **7**
- Purch. Invoices... Next Week: **6**

**Payments**

- Unprocessed Payments: **1**
- Average Collec... Days: **0.0**
- Outstanding V... Invoices: **21**

Scan documents | Create Incomin... from Camera

**Incoming Documents**

- My Incoming Documents: **0**

**Insights**

**Business Performance**

**Top Five Customers by Sales Value**

Customer	Sales Value
20000 - Trey Research	~20,000
40000 - Alpine Ski House	~40,000
50000 - Relecloud	~50,000
30000 - School of Fine Art	~30,000
10000 - Adatum Corpor...	~10,000

**Power BI**

- Select Report
- Previous
- Next
- Expand
- Reload
- Upload Report
- Reset My Reports
- Reset Reports for All Users

**Favorite Accounts**

Account No. ↑	Name	Balance
10100	Checking account	-9,703.58
10200	Saving account	0.00
10300	Petty Cash	96,549.23
10400	Accounts Receivable	73,606.26
20100	Accounts Payable	-82,552.07

Why



# How

White glove

Sherpa

Catalyst



# White Glove Projects



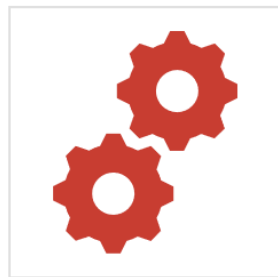
Deep discovery to capture best processes



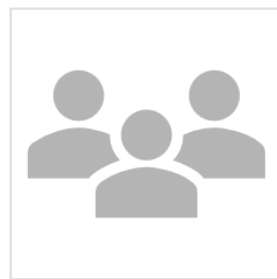
1:1 Workshops catered to your company needs



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



Core Accounting



Purchasing & AP



Sales & AR



Core Inventory



Technical

Introduction to Business Central/Teams

Accounting Setup

Posting Groups

G/L transactions

Banking and Cash  
transactions

Fixed Assets

Financial Reporting &  
Budgeting

Purchase & Payables Setup

Purchase transactions

Payment Application  
(combined with Sales)

Sales & Accounts Receivables  
Setup

Sales transactions

Payment application  
(combined with purchasing)

Inventory – Item card setup

Inventory Transactions

Workflows and approvals/  
Users & Security

Configuration Packs/Edit in  
Excel

Go-live Cutover Preparation



# Catalyst Services



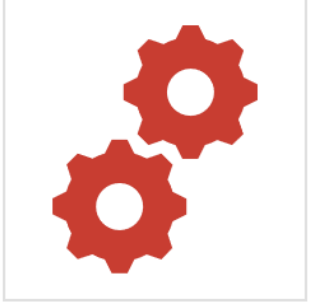
Option to attend: 16 Live Workshops  
Delivered Over 8 Weeks  
Group audience



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





# 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.

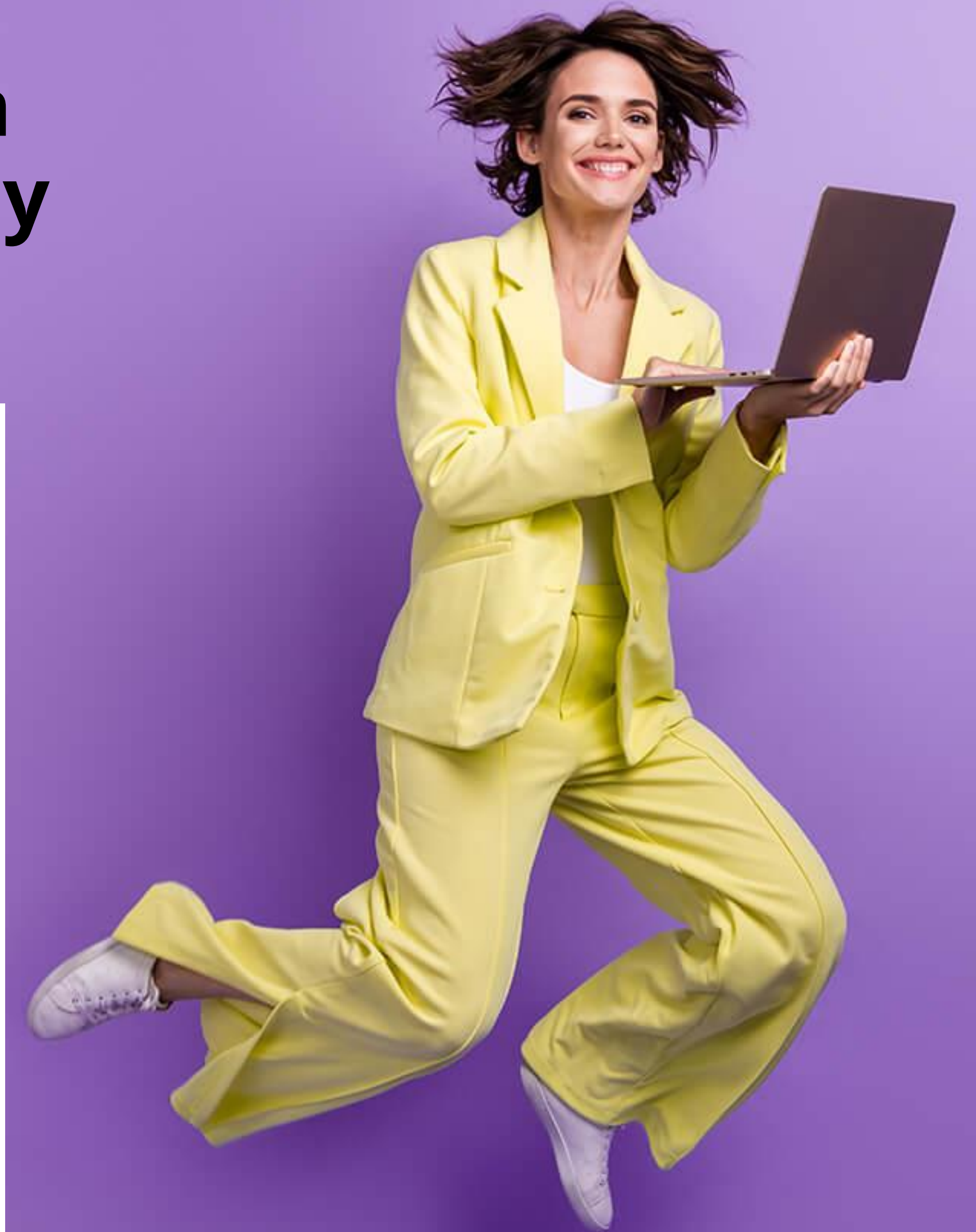


### Connect with existing systems

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!**







**Thank You!**  
**Let's Connect:**

**Cecilee Nelson**  
*Cecilee.nelson@journeyteam.com*

**Lisa Downing**  
*Lisa.downing@journeyteam.com*

