

# The Scoop on Microsoft Dynamics ERP Roadmaps & Releases

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Discover the plans for Microsoft Dynamics release waves and updates



Evaluate how to align and prepare your organization



Uncover the latest enhancements and features to help you utilize your existing solutions



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# Armanino Overview



## PURPOSE

To be the **most innovative** and **entrepreneurial** firm that makes a **positive impact** on the lives of our **clients, people and communities**.



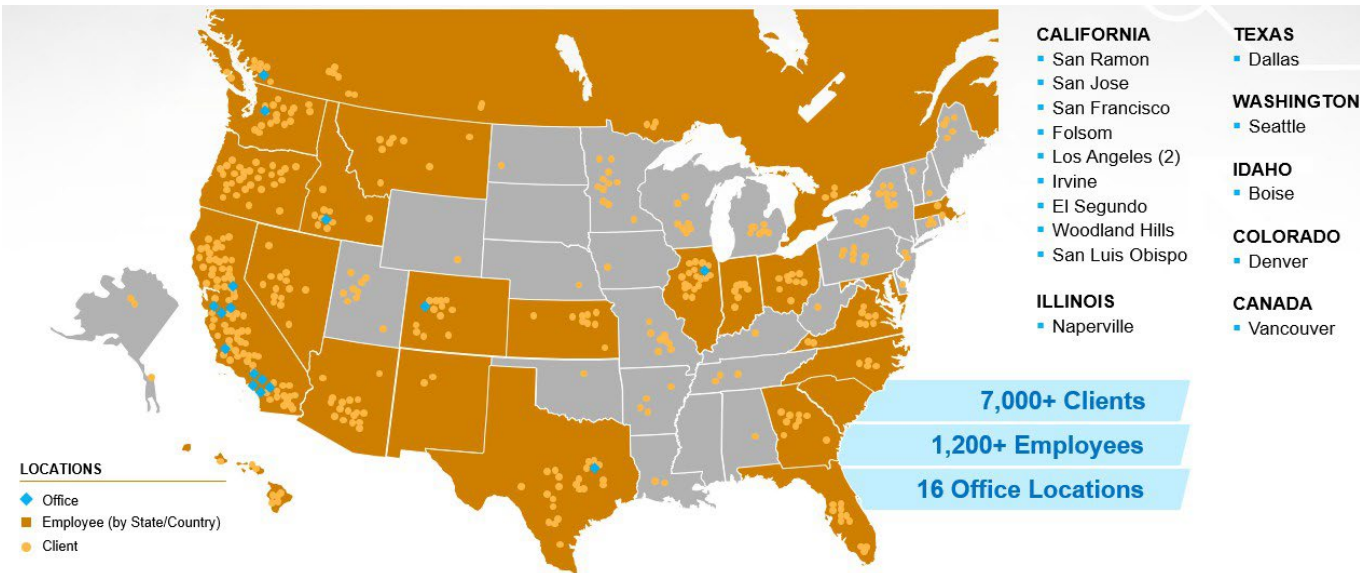
## SNAPSHOT

- 1500+ Employees
- Team Members in 22 States
- 20<sup>th</sup> Largest CPA & Consulting
- Largest Niche: Technology

### Affiliate Companies



## LOCATIONS



## RECOGNITION & AWARDS



8 Years Running



# Microsoft Dynamics ERP Overview

## Dynamics SL

Formerly Solomon

Minimal New Features Planned

Path to move to BC

## Dynamics GP

Formerly Great Plains

Life-Cycle Support Policy

Continued Enhancements

Path to move to BC

## Dynamics 365 BC

Formerly Dynamics NAV (AKA Navision)

For SMB market

Cloud & On-premise Option

## Dynamics 365 F&O

Formerly Dynamics AX (AKA Axapta)

For Medium to Enterprise

Cloud & On-premise Option

## Polling Question #1



## The Choice Between On-Premise vs. Cloud

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- Company has an initiative to move to the cloud
- Access from remote locations and devices
- Workforce is scattered across multiple locations and/or working remote
- Less infrastructure to maintain
- Protecting your applications and your data from cyber attacks
- AI and BI capabilities



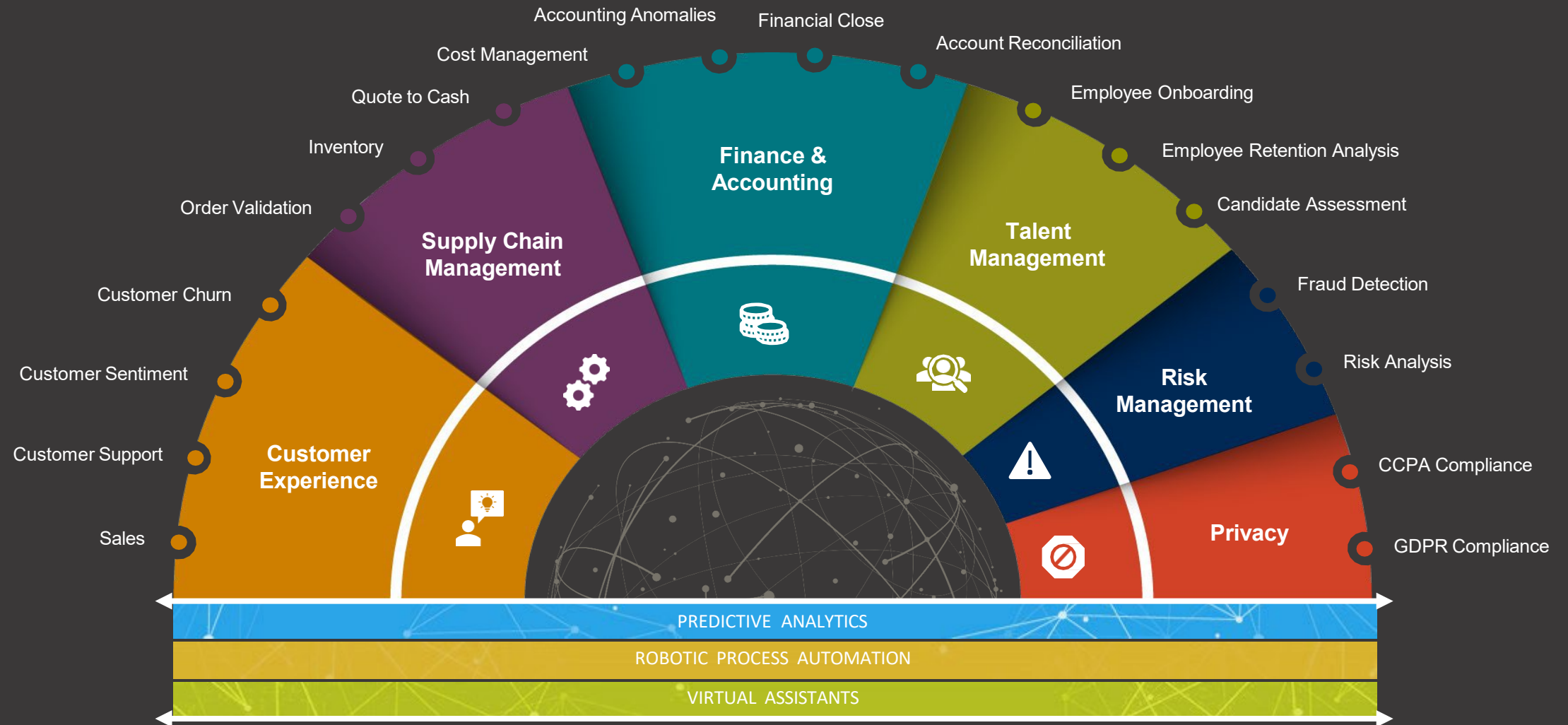
- Cybersecurity monitoring/training/system backups/insurance policies

- DATA ANALYTICS

Key: Visibility

- Visibility across systems (ERP, P2P, T&E, CRM, HR)
- Coordination between functions
- Continuous monitoring not only for fraud, but for new areas of risk and trends in the business
- Data driven, intuitive and integrated





# THE SPECTRUM OF AI BUSINESS SOLUTIONS

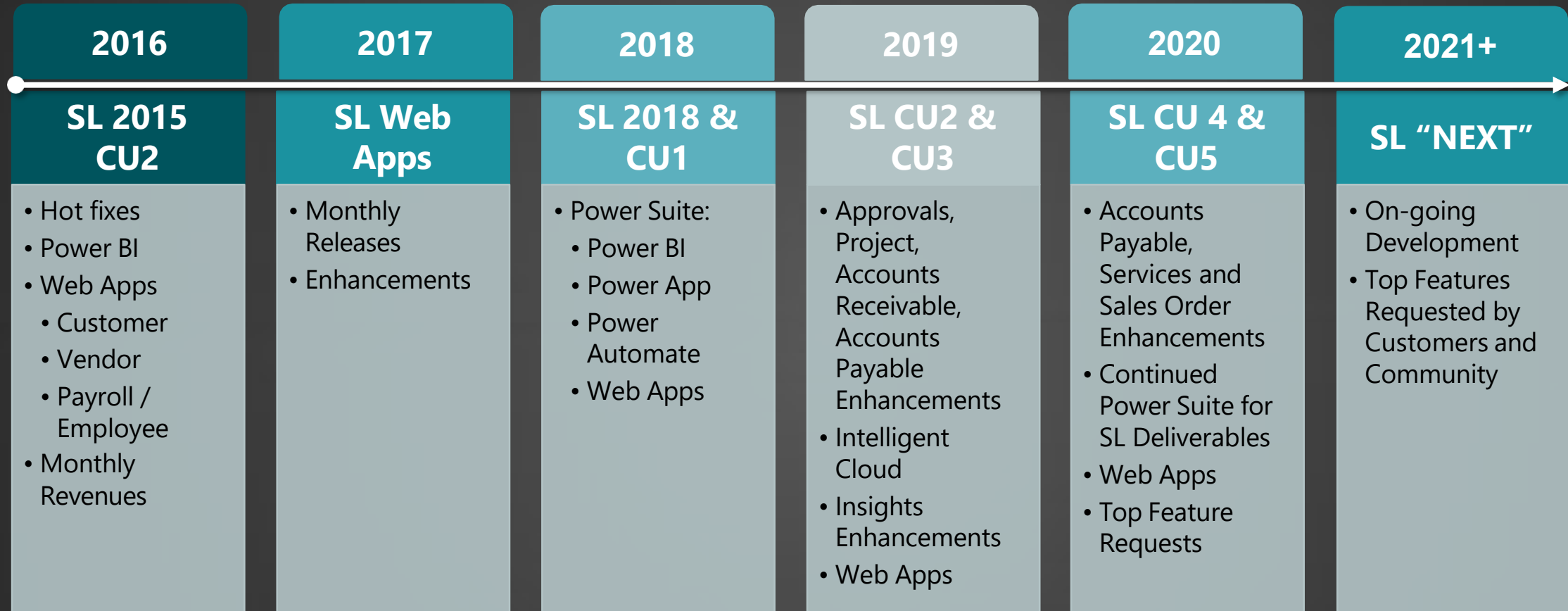
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## Polling Question #2

# Microsoft Dynamics SL

Roadmap & Support

# Microsoft Dynamics SL Roadmap



1

Start with your balances and transactional data in Dynamics 365 Business Central. The migration option is now available.

2

Upgrade to the latest Dynamics SL 2018 version to stay supported.

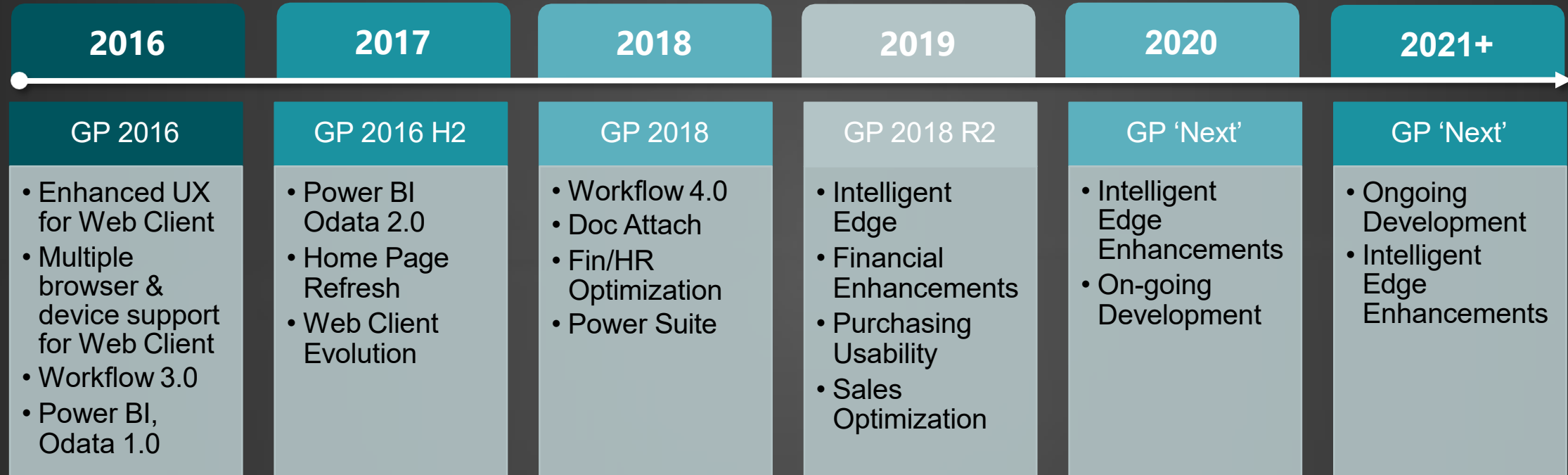
3

Already on Dynamics SL 2018? You can connect to Business Central with Intelligent Edge to use the cloud capabilities.

# Microsoft Dynamics GP

## Roadmap & Lifecycle Policy

# Microsoft Dynamics GP Roadmap



# Demystifying the Lifecycle Policy

Dynamics GP Older Version Before Oct 2019



On the existing Fixed Policy Lifecycle, here are the support end dates for those previous versions:

Dynamics GP 2015 –  
Mainstream support  
end date 4/14/2020

Dynamics GP 2016 –  
Mainstream support  
end date 7/13/2021

\*Dynamics GP 2018 –  
Version 18.00.0727  
and prior– Mainstream  
support end date  
1/10/2023

*\*Anything before October 2019 release.*

# Upgrade Schedule for Releases and Support

Year	New Features and Bug Fixes	Tax Updates & Bug Fixes	Year End Updates	Staying Current
2020	October	June	November/December	Must be on one of the 2020 releases.
2021	October	June	November/December	Must be on one of the 2021 releases.
2022	October	June	November/December	Must be on one of the 2022 releases.
2023	October	June	November/December	Must be on one of the 2023 releases.
2024	October	June	November/December	Must be on one of the 2024 releases.



## Dynamics GP Requirements & the Path to D365 BC



Annual subscription billing



A price point that is equal to the EP renewal quote



Dual use and downgrade rights to current on-premise Dynamics Price List product



Try D365 BC with your data before committing to the software



Secure your data in Microsoft's cloud and reduce or eliminate hardware costs



Enable a remote workforce with a true cloud-based Solution



Access the Common Data Service and Power Platform (Automate, BI, Apps)



Improve integrations to your other Office 365 apps

**Current on Maintenance:** CSP price list discount of 60% for customers who are ready to move to their primary deployment to the cloud. On your next renewal stop paying Enhancement Plan (aka BREP) and purchase the new CSP transition license.

## On- premise To Cloud

Current License	Business Central		Discount	Per user per month
Dynamics AX Dynamics GP Dynamics NAV Dynamics SL	Business Central Premium	\$100	60%	\$40
	Business Central Essentials	\$70	60%	\$28
	Business Central Team Members	\$8	60%	\$3.20
	Business Central Device	\$40	60%	\$16

**NOTE:** For existing customers, this is good through 6/2021.

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## Polling Question #3

## Dynamics 365 BC (D365 BC)



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31 years  
of heritage



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140,000  
customers



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3.3 million  
users



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Sold in 196  
countries



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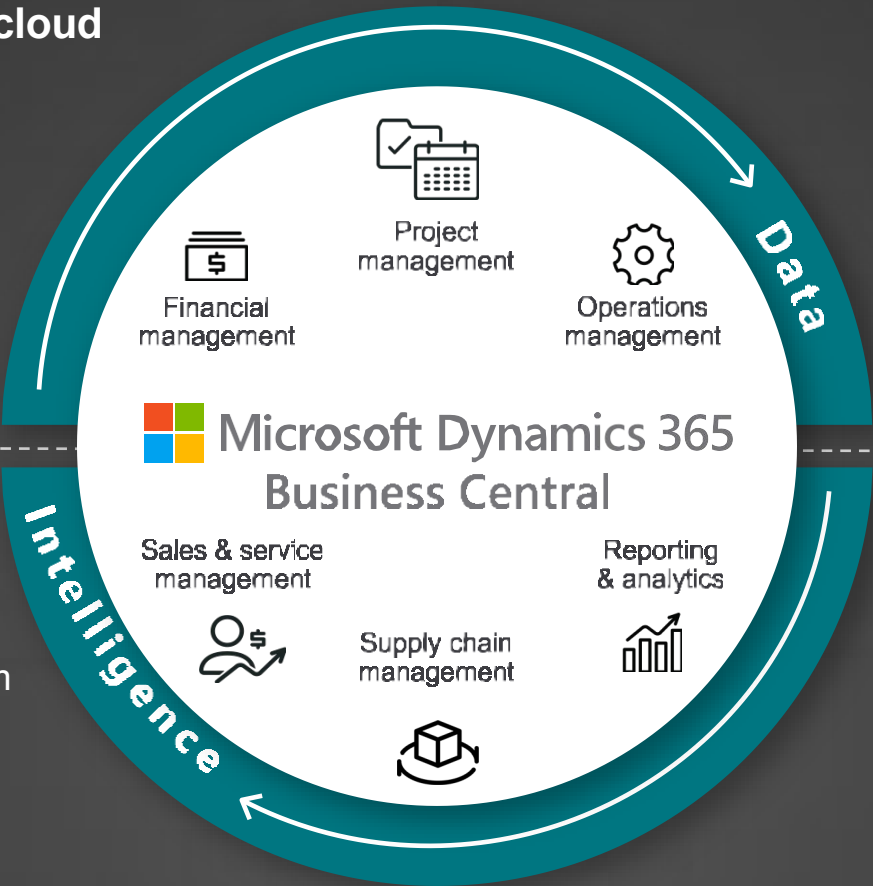
Served by  
4,500 partners

Modern

Transformed experiences across, mobile, social, mixed reality, and modular applications

Unified

Flexible, scalable  
Trusted Microsoft cloud and security  
Rich, global ecosystem of partners



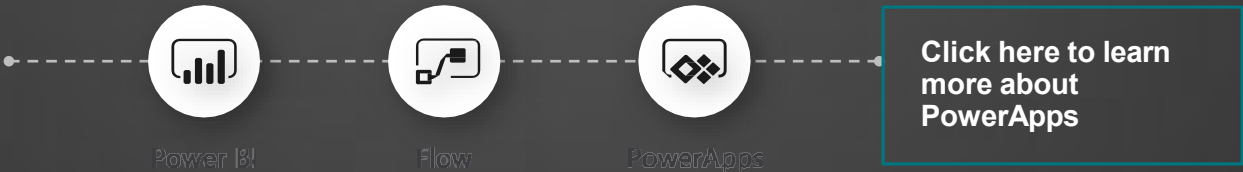
Intelligent







Unified and intelligent data and processes  
Rapid deployment, onboarding, and quicker time to value  
Recognized as an industry leader

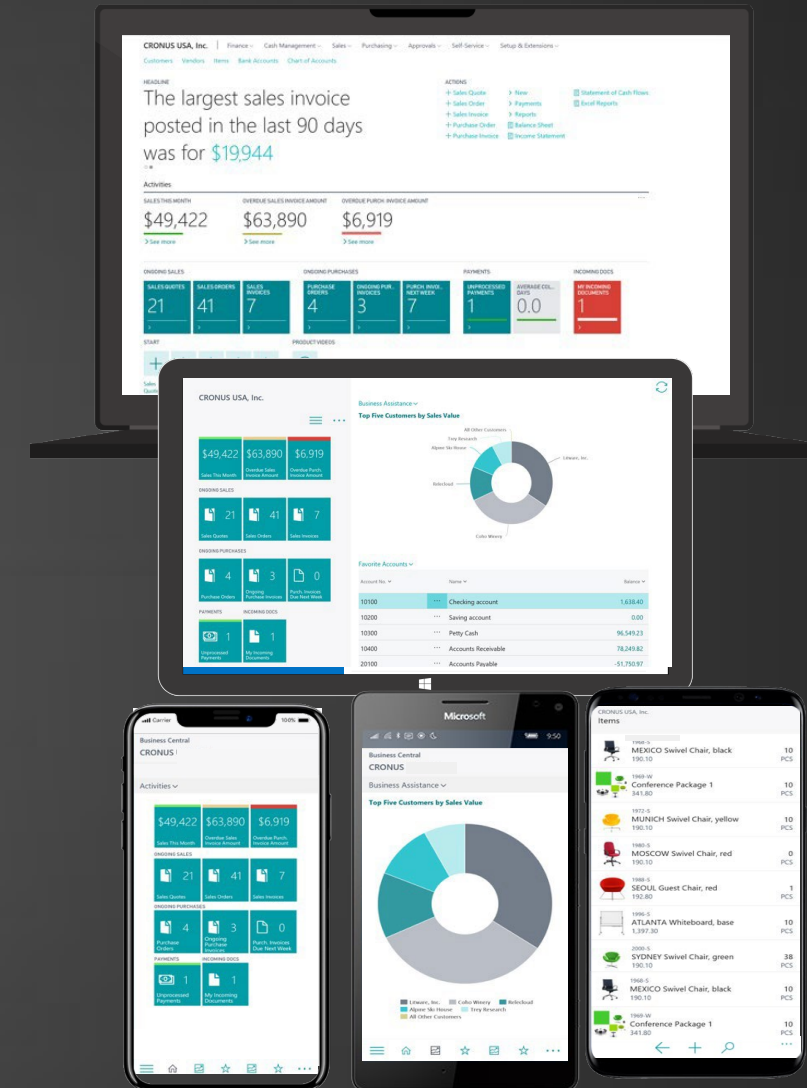
Adaptable

Full NAV functionality  
Continued feature investments

Power platform



	<b>Financial management</b>	Accounts receivables/payables	Bank reconciliation	Fixed asset management	Month/Year end closing
	<b>Sales &amp; service management</b>	Quote generation	Contact management	Sales invoicing	Payment processing
	<b>Project management</b>	Capacity planning	Budget and estimates	Job and process costing	Resource Management
	<b>Supply chain management</b>	Inventory and Purchasing control	Shipment and distribution	Returns and cancellations	Procurement and vendor management
	<b>Operations management</b>	Forecasting	Production planning	Manufacturing capacity	Warehouse management
	<b>Reporting &amp; analytics</b>	Customer insights	Self-sense reports	Interactive dashboards	Built-in intelligence



Spring 2018

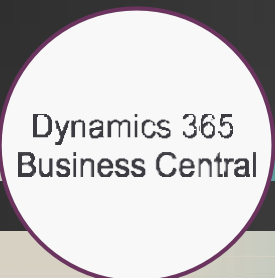
Fall 2018

2019

2020

2021

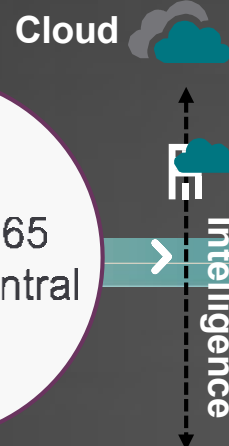
2022



Dynamics 365 Business Central (Cloud)



On-premise



Proficiency improvements

Modern Clients

CDS+ Data + Intelligence

VS Code + AL improvement

C/AL to AL conversion

VS Code + AL Only

CDS + Data + Intelligence platform for partners

## Areas of Investment:

### Connect your business

Bring people, processes, and data together to manage your business end to end

### Make smarter decisions

Easy to create dashboards and built in analytics give you a 360° view of your business so you can proactively inform and guide employees

### Start and grow easily

Quickly get up and running, then meet your unique business needs by easily integrating add on applications and industry specific solutions

### Always be ahead

Modern business management, powered by the Microsoft technology stack, deeply integrates with Office 365 and Power BI

# Business Central Roadmap

A close-up photograph of two hands assembling white puzzle pieces. The hands are positioned at the top and right, with one hand having red nail polish and a silver ring. The puzzle pieces are being brought together to form a larger shape. The background is blurred, showing a person in a white shirt. The bottom half of the image is overlaid with a semi-transparent orange gradient.

# Dynamics 365 Finance & Operations (F&O)

Release Waves



## April - September 2020

- Financials embedded Power BI is enhanced and renamed
- Notification of related prepayment invoices marked for settlement
- Trial balance report with transactional detail and unposted GL transactions
- Update the invoice quantities to match product receipt quantities in workflow
- Add date option for generating the accrued purchases excluding the sales tax report
- Cash flow forecast calculation – enhanced scheduling (via process automation)



## October 2020 – February 2021

- Customer payment predictions
- External data for cash flow forecasting
- Forecast bank balance
- Intelligent budget proposal
- Treasurer workspace

### Dynamics 365 Finance

- Focus on automating common tasks to reduce the number of manual processes and add insights and intelligence in Finance.
- Asset leasing enhances the core capabilities of Finance and the global coverage for Finance continues.

### Dynamics 365 Supply Chain Management

- Expanded planning optimization for Manufacturing to perform supply and production planning in near real time with in-memory services.
- Enhancements to Product Information Management include engineering change management and production versioning capabilities.
- Cost Management includes new features that will enable global companies to maintain multiple cost accounting ledgers by allowing dual currency and dual valuation.
- Enhancements to the job card device include a new user experience and a new feature to enable reporting serial numbers.

### Dynamics 365 Human Resources

- Focus on intelligent workflows by taking advantage of data and AI innovations.
- Work instructions can be configured to adjust on the fly based on operator inputs.
- Insights will make it easier to use time-tracking data and connect that data to your business.

### Dynamics 365 Project Operations

- Unify operational workflows to give visibility, collaboration and insights to drive success across teams from sales to finance.
- Project Operations connects your sales, resourcing, project management, and finance teams within a single application to win more deals, accelerate delivery, empower employees, and maximize profitability.

**Current on Maintenance:** CSP price list discount of 40% for customers who are ready to move to their primary deployment to the cloud. On your next renewal stop paying Enhancement Plan (aka BREP) and purchase the new CSP transition license.

## On-premises To Cloud

Current License	Finance & Supply Chain Management		Discount	Per user per month
Dynamics AX Dynamics GP Dynamics NAV Dynamics SL	D365 for Finance	\$180	40%	\$108
	D365 for Supply Chain	\$180	40%	\$108
	D365 for Human Resources	\$120	40%	\$72
	D365 Team Members	\$8	40%	\$4.80

**NOTE:** Dynamics 365 Transaction Licensing for existing customers do not have an expiration date.

Comparison	Dynamics GP	D365 BC	D365 F&O
License Cost	Perpetual License with annual EP, Hosting costs additional	\$70/user/Mo. Essential \$100/user/Mo. Premium – no min + cost of add-on solutions	\$180/user per month; 20 user minimum
Upgrades / Updates	Requires Upgrade to current version; then free service pack updates	SaaS - Automated updates so always on current version	SaaS - Automated updates so always on current version
General Ledger	Segmented COA	Dimensional COA	Dimensional COA
Multi-Entity	Yes, Separate Databases	Yes, Separate Databases	Full M/E in Single Database
Financial Reporting	Management Reporter and Jet Reports	Leverages account schedules and analysis views. Can use Solver, other ISVs or Power BI	Native financial report writer; also embedded PowerBI
Budgeting	Excel-based, complex requires ISV such as Solver or Adaptive	Excel-based, complex requires ISV such as Solver or Adaptive	Yes; 3 <sup>rd</sup> party for complex scenarios
BI Capabilities	Some PowerBI integration; can leverage analysis cubes to work with OLAP tools; custom integration with Tableau	Strong integrations with PowerBI and Power Platform	Strong integrations with PowerBI and Power Platform
Inventory	Ability to track perpetual inventory and safety stock levels	Ability to track perpetual inventory and safety stock levels	Ability to track perpetual inventory and safety stock levels

## High-level Comparison of Dynamics GP, BC and F&O

Comparison	Dynamics GP	D365 BC	D365 F&O
<b>AR / Customer Records</b>	Yes	Yes	Yes
Sales Commission	Basic commission calc; complex requires ISV	Requires ISV	Includes basic commission calc.
Collections Management	Requires ISV	Requires ISV	Embedded AI to predict customer payments
<b>Revenue Recognition</b>	Use allocation accounts; may become impractical	Can allocate across departments & locations; Advanced Rev Rec requires add-on solution	Native Functionality
<b>Projects</b>	Project Accounting out of the box.	Fairly strong capabilities for tracking projects / jobs	Very strong capabilities for tracking projects / jobs
<b>Purchase Orders</b>	Requisitions available with approval workflow out of the box. Punch-out would require ISV	Requisitions and punch-out would require ISV	Complete procurement solution, including requisitions and punch-out
<b>AP Automation</b>	Native workflow; recommend ISV for full AP Automation	Native workflow; recommend ISV for full AP Automation	Native capabilities; recommend Add-On Solution for OCR
<b>MICR Check Printing</b>	Requires ISV	Yes	Yes
<b>Expense Management</b>	Integration with Concur and other solutions	Integration with Concur and other solutions	Native functionality; can also integrate with Concur
<b>Cash Management / eBanking</b>	Native; requires integration with Bank; Recommend 3 <sup>rd</sup> party for complex scenarios	Native; requires integration with Bank; Recommend 3 <sup>rd</sup> party for complex scenarios	Native; requires integration with Bank; Recommend 3 <sup>rd</sup> party for complex scenarios
<b>Integrations</b>	Integration Manager or eConnect other ISV solutions for integrations	Web Services (SOAP or OData); Or leverage other ISV integration tools	Multiple options that are native to platform

## High-level Comparison of Dynamics GP, BC and F&O



Schedule a complimentary 60-minute system review with your client manager & ERP consultant



Define which path works best for you

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## Polling Question #4

## Q&A

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# Armanino Operates in an Alternative Practice Structure:

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