

Microsoft Dynamics 365

Business Central Review FAQ

What are the benefits of performing a Microsoft Dynamics 365 Business Central (Business Central) Review?

1. Help you optimize your system.
 - a) By ensuring configurations, enhancements, add-ons, and security are optimized, you'll unlock the best possible performance from your ERP system. An optimized setup reduces bottlenecks, streamlines processes, and enhances data accuracy. This enhanced performance supports your team's productivity by reducing time spent on manual tasks and minimizing errors, allowing them to focus on higher-value activities.
2. Determine underutilized areas/features of the system.
 - b) Being a company that specializes in Business Central, we have seen many different configurations and have experience in many different industries. We will use our knowledge and experience to recommend areas or tools that have been very successful at similar companies to help you have a more efficient system that will grow with you.

Ultimately, a finely tuned ERP system empowers you to be more agile and responsive, delivering a strong return on investment and setting a solid foundation for future growth and scalability.

How do you perform a Business Central Review?

Application Review

For the Application Review, we will:

1. Discuss Your Current Business Processes as They Relate to Business Central
 - a) This phase focuses on understanding your unique business workflows and how they intersect with Business Central. We will discuss each of your key processes—such as finance, fixed assets, purchasing, supply chain, sales, and reporting— and how they interact with Business Central. This allows us to identify areas where Business Central could be further leveraged to better support your goals, improve efficiency, and reduce manual effort.
2. Learn How You Currently Utilize Business Central
 - a) In this phase, we will dive into your current Business Central usage, exploring how your team interacts with the platform daily. This includes understanding your team's experience and day-to-day use of Business Central's functionalities. By gaining

insight into your usage patterns, we can help you maximize the system's potential, uncover underutilized features, and ensure Business Central is providing the best value to your organization.

Enhancement/Customization Review

For the Enhancement/Customization Review, we will:

1. Discuss Your Current Business Central Enhancements
 - a) This involves discussing the specific enhancements/customizations you have implemented to tailor Business Central to your needs. By understanding the purpose of these enhancements/customizations, we can evaluate their effectiveness in supporting your operations, identify potential gaps, and determine if they align with your current business objectives.
2. Assess the Current Enhancements to Determine Opportunities for Increased Efficiency
 - a) We will assess whether they are fully optimized or if there are ways to improve efficiency and streamline workflows. This could mean refining existing customizations/enhancements, replacing outdated modifications with more robust solutions, or uncovering unused Business Central features that could simplify processes. Our goal is to ensure your enhancements are driving value, eliminating unnecessary complexity, and empowering your team to work more effectively.

What documentation will I receive from the Reviews?

Upon completing the Reviews, Callow & Associates will provide the following:

1. Documents Outlining our Findings and Recommendations and Allocate Time for Detailed Discussion
 - a) We will compile our findings, including any potential areas for improvement or optimization, along with tailored recommendations. We will schedule a follow-up meeting to walk you through these insights, answer questions, and discuss specific next steps in greater depth.
2. Software and Consulting Estimates for Additional Projects
 - a) If our review reveals opportunities for further enhancements or projects, we will include estimates for software and consulting services to address these needs, enabling you to plan and prioritize your next steps effectively.

Why should I work with Callow & Associates to complete a Business Central Review?

- 1) **This is what we do:** Every client with Callow & Associates has undergone a comprehensive review, ensuring each ERP implementation is fine-tuned for maximum efficiency. Our experience allows us to identify key optimization opportunities tailored to each organization's unique needs.
- 2) **We have a diverse range of experience:** Our team serves a wide range of industries such as oilfield services, non-profit, distribution, construction, and service management to name a few. This breadth of experience enables us to approach challenges with innovative solutions and out-of-the-box thinking.
- 3) **We are experts in this field:** With over 300 years of combined ERP implementation and support experience, Callow & Associates brings a deep well of knowledge to each project. Our seasoned experts leverage proven best practices and insights to help clients achieve long-term ERP success and adaptability.