

Columbus® | Once you
know how...



Microsoft Dynamics 365 Business Central

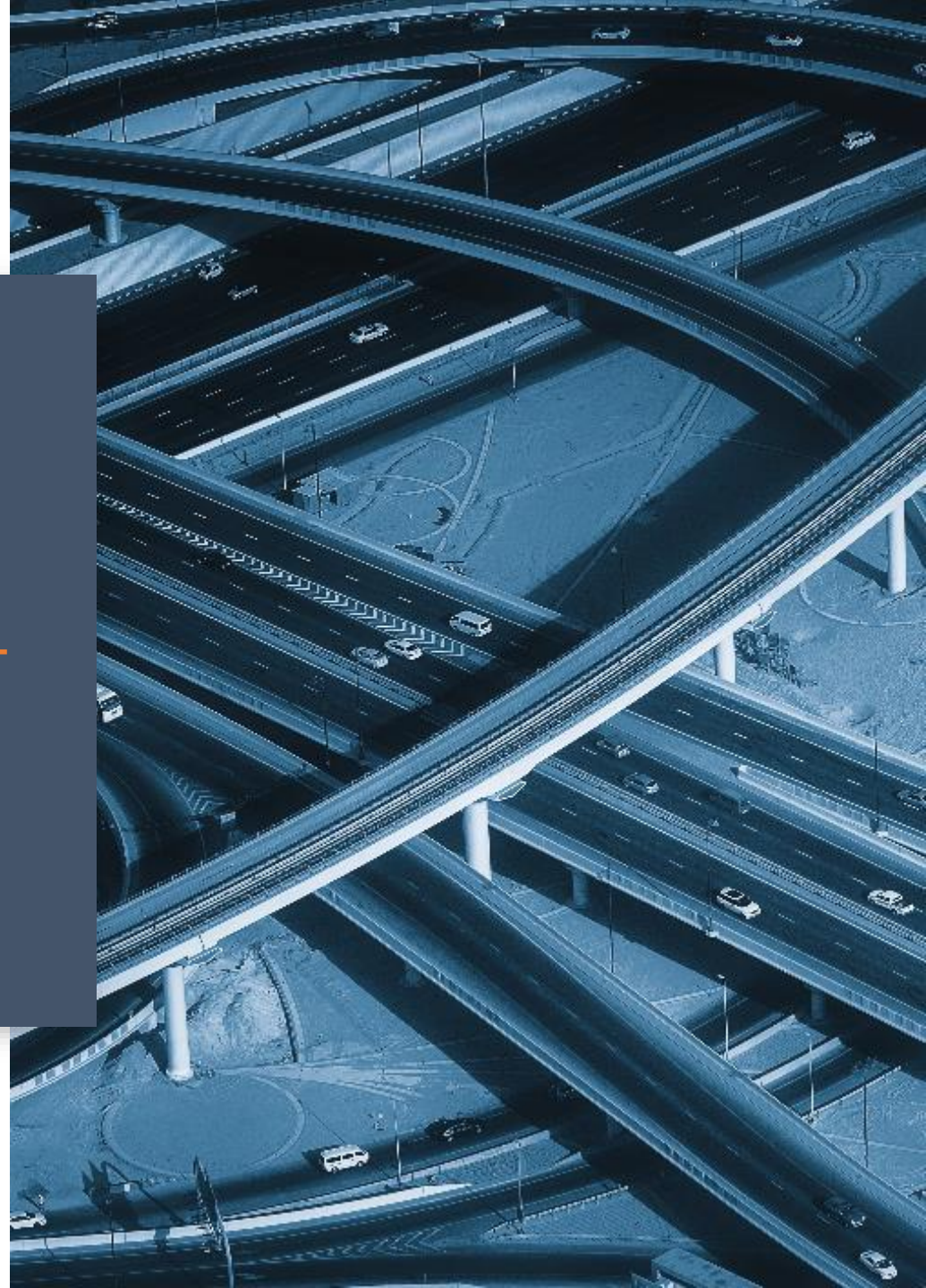
Mark Thompson

Agenda

- Introductions
- How D365 BC can help businesses
 - Pain Points
 - Solution Overview & Future Process
- Walkthrough
 - D365 BC
- Reporting
 - BC
 - Jet
 - Power BI
- Questions



About Columbus





Vision

To be the preferred service provider of digital business solutions globally

Mission

Help ambitious companies transform, maximize and futureproof their business digitally

Our service offerings

9 Doors to Digital Leadership



Columbus by the numbers



75,000

Customers cases
solved every year



24/7

Global support with
Columbus Care



45

countries with clients
running our business
applications & services



4,000+

Customers
worldwide



2,000

Employees across
the world



8,600

Business application
implementations



1,700,000

Hours of consultancy
every year



5x

Microsoft global
partner of the year



28 years

Of Business

Presence across 17 countries

- Denmark
- Sweden
- Norway
- United Kingdom
- USA
- Germany
- Switzerland
- Czech Republic
- The Netherlands
- Russia
- Spain
- Poland
- Lithuania
- Estonia
- Chile
- China
- India



Local business partner with global strength

Company History - Columbus UK

- UK HQ Nottingham; Cambridge; Warrington Office + Hyderabad
- £25M+ Turnover
- 220+ Employees
- Dynamics ERP, Dynamics CRM, Cloud, IoT, Data Analytics
- Implementing and Supporting Dynamics NAV since 1996
- Over 200+ UK customers
- 60+ Team delivering and supporting NAV and CRM solutions



A few of our customers

Columbus[®] | Once you know how...



Introduction to Microsoft D365 Business Central

Definition

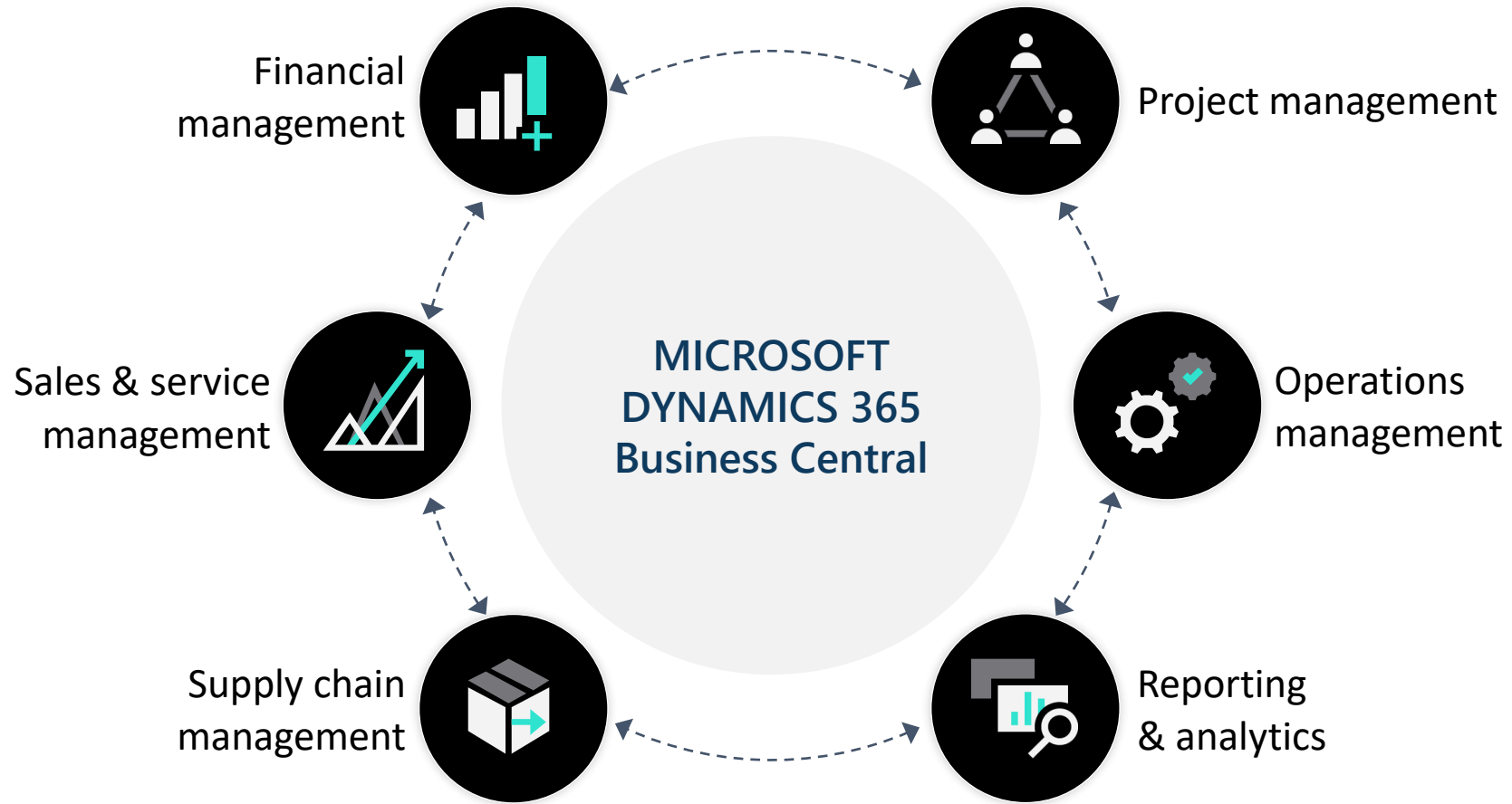
Microsoft Dynamics is a line **of enterprise resource planning (ERP) and customer relationship management (CRM)** software applications. Microsoft markets Dynamics applications through a network of **reselling partners who provide specialised services**. Microsoft Dynamics forms part of "Microsoft Business Solutions". Dynamics can be used with other Microsoft programs and services, such as SharePoint, Yammer, Office 365, Azure and Outlook. The Microsoft Dynamics focus-industries are retail, services, manufacturing, financial services, and the public sector. Microsoft Dynamics offers services for **small, medium, and large businesses**.



Microsoft Dynamics 365



D365 Business Central





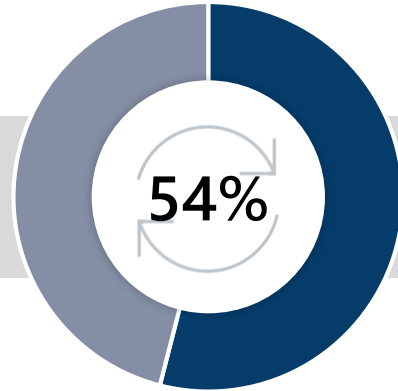
How can D365 Business Central address the business challenges of Growth and Performance?

Challenges (Nucleus Research)



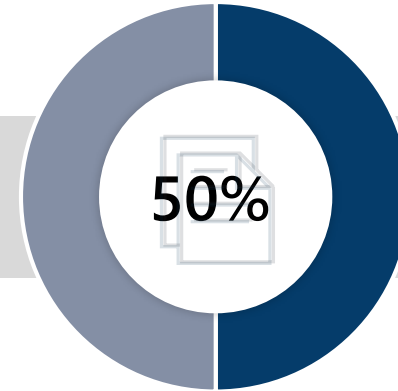
Strained Business Growth

Business is growing but systems can't keep up



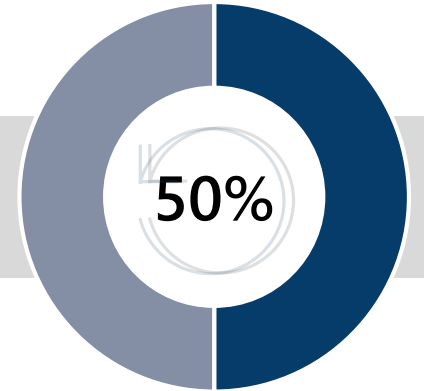
Disconnected Systems

54% of organizations struggle with process and system integration issues



Reporting Limitations

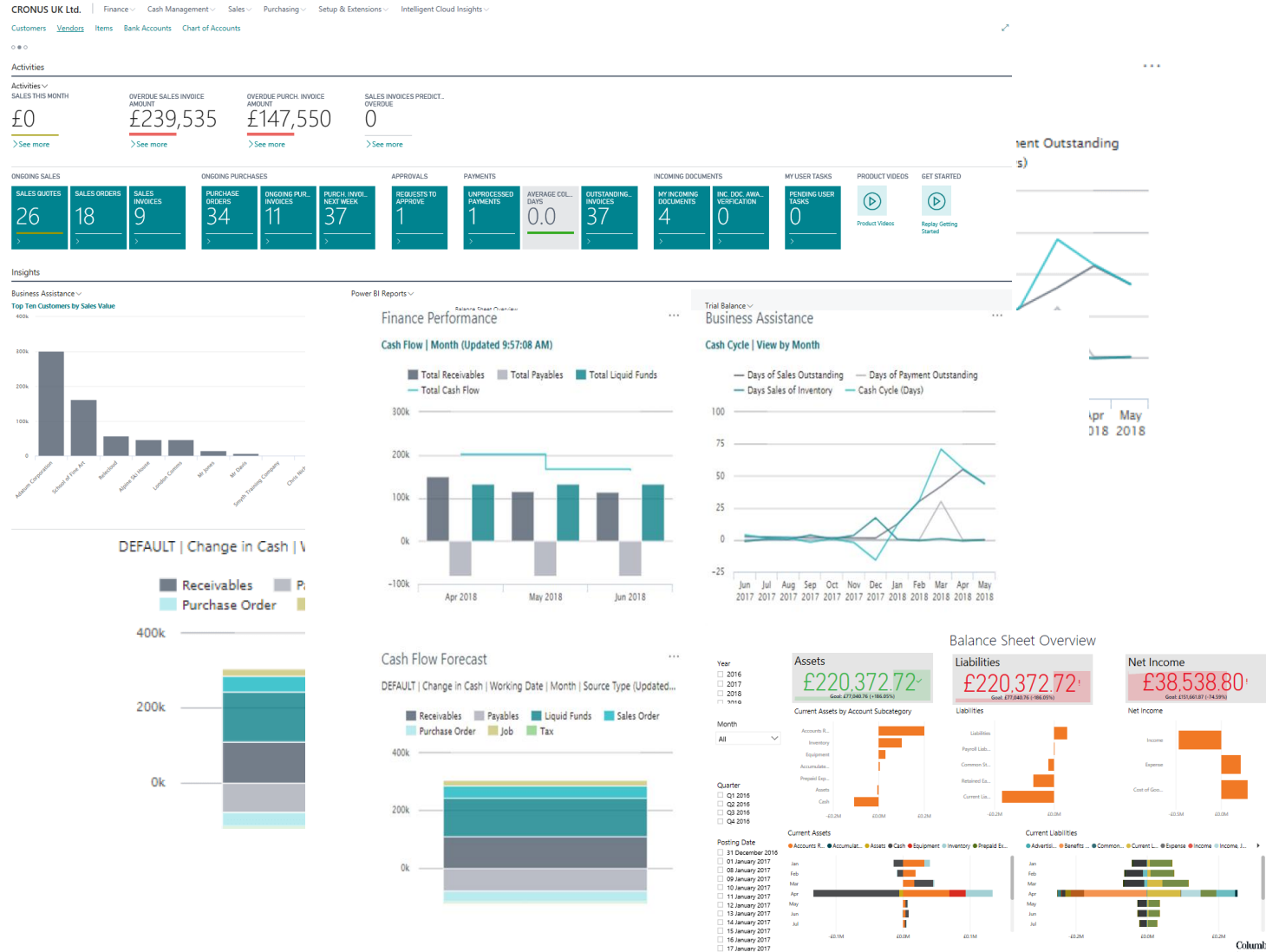
50% of organizations think creation and configuration of reports is too complicated



Outdated and Legacy Systems

50% of organizations want to replace outdated hardware and software to improve business performance

Control Costs – Increased Financial Visibility



Make informed decisions with connected data across accounting, sales, purchasing, stock, and customer transactions.

Chart financial performance in real time with built-in Power BI dashboards. Identify patterns and trends and gain new insights with in-depth analysis and unlimited dimensions.

Accelerate financial close and reporting and maintain compliance with quick, accurate, and streamlined sales ledger and accounts payable.

Improve forecast accuracy with comprehensive data modelling and analysis. Customise and share reports with seamless Excel integration.

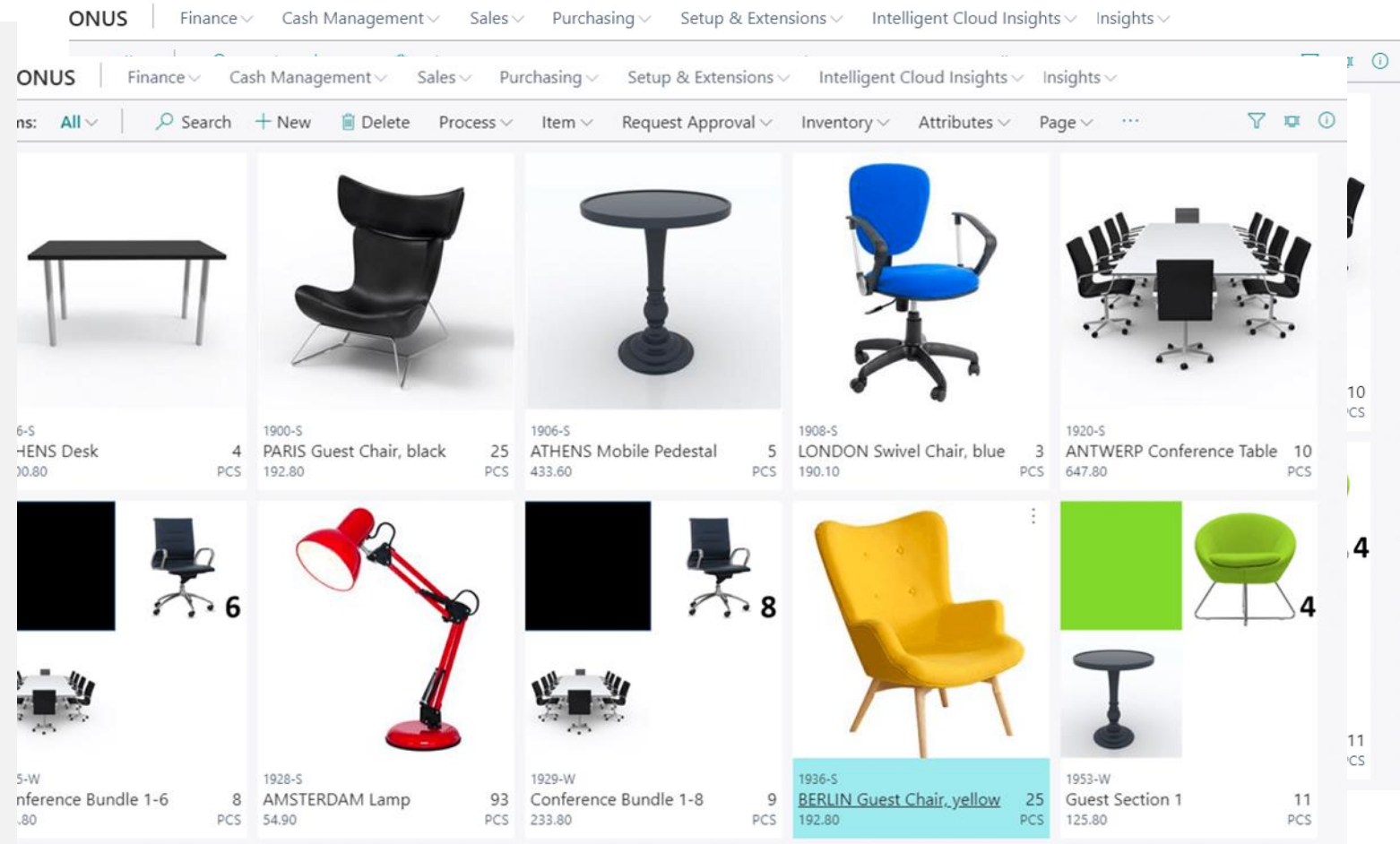
Managing Cashflow – Supply Chain Optimisation

Predict the optimal time to replenish stock with built-in intelligence. Use sales forecasts and expected stock-outs to automatically create purchase orders.

Get a holistic view of stock for timely order fulfilment. Track every item transaction and movement by setting up bins based on warehouse layout and storage unit dimensions.

Calculate and optimise manufacturing capacity and resources to improve production schedules and meet customer demands.

Maintain the right amount of stock by automatically calculating stock levels, lead times, and reorder points. When requested items are out of stock, automatically suggest replacements.



Customer Satisfaction– Increase Sales & Improve Service

JG

Tue 9/19/2017 2:29 PM

Jim Glynn <jim.glynn@cronuscorp.net>

JG

Tue 9/19/2017 2:29 PM

Jim Glynn <jim.glynn@cronuscorp.net>

Request for a quote on some furniture

To

Jared Philips

You replied to this message on 12/4/2017 4:02 PM.

Hello Jared,

We are planning an office renovation and need a quote for some new furniture. Can you provide me a quote for the items listed below?

Item	Quantity
London Swivel Chair	7
Antwerp Conference Table	2

We plan to have renovations completed by the end of June. Can we have the furniture delivered by the third week of June?

Best regards,
Jim

Jim Glynn
Coho Winery
jim.glynn@cronuscorp.net
(701) 555-0151

Coho Winery

C00010 · Jim Glynn

C00010 · Jim Glynn

Details

7,050.72

0.00

11,154.00

Balance (LCV)

Past Due

LTD Sales

11,154.00

YTD Sales

Aged Accounts Receivable ▾

Period Length: Week | 1 month overdue

10k

5k

0k

Not Overdue

2W

4W

Sell-to Customer Sales History

1	1	0	0
Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders	Ongoing Sales Invoices
0	5	5	0
Ongoing Sales Credit Memos	Posted Sales Shipments	Posted Sales Invoices	Posted Sales Credit Memos

Prioritise sales leads based on revenue potential. Keep track of all customer interactions and get guidance on best upsell, cross-sell, and renewal opportunities throughout your sales cycle.

Accelerate the sales process from quote to cash. Act quickly on sales-related enquiries, manage service requests, and process payments—all from within Outlook.

Gain a comprehensive overview of your service tasks, workloads, and employee skills to effectively assign resources and facilitate case resolution.

Efficiency– Automation

WORKFLOW | WORK DATE: 08/04/2019

✓ SAVED

MS-POAPW-01 · Purchase Order Approval Workflow

Import from File

Export to File

Workflow Step Instances

Archived Workfl... Step Instances

More options

Code

MS-POAPW-01

Description

Purchase Order Approval Workflow

Category

PURCHDOC

Enabled

☒

Workflow Steps

Manage

WHEN EVENT	ON CONDITION
Approval of a purchase document is requested.	Document Type: O
An approval request is approved.	Pending Approvals
An approval request is approved.	Pending Approvals
An approval request is rejected.	<Always>
An approval request for a purchase documen...	Document Type: O
An approval request is delegated.	<Always>

EDIT - BATCH POST SALES ORDERS

Options

Ship ☐

Invoice ☒

Posting Date 20/09/2019

Replace Posting Date ☒

Replace Document Date ☐

Calc. Inv. Discount ☐

Sales Order

Limit totals to:

Where: Date Filter is: "20/09/19

Show results:

And: Shipped Not Invoiced is: Yes

And: Status is: Released

OK Cancel

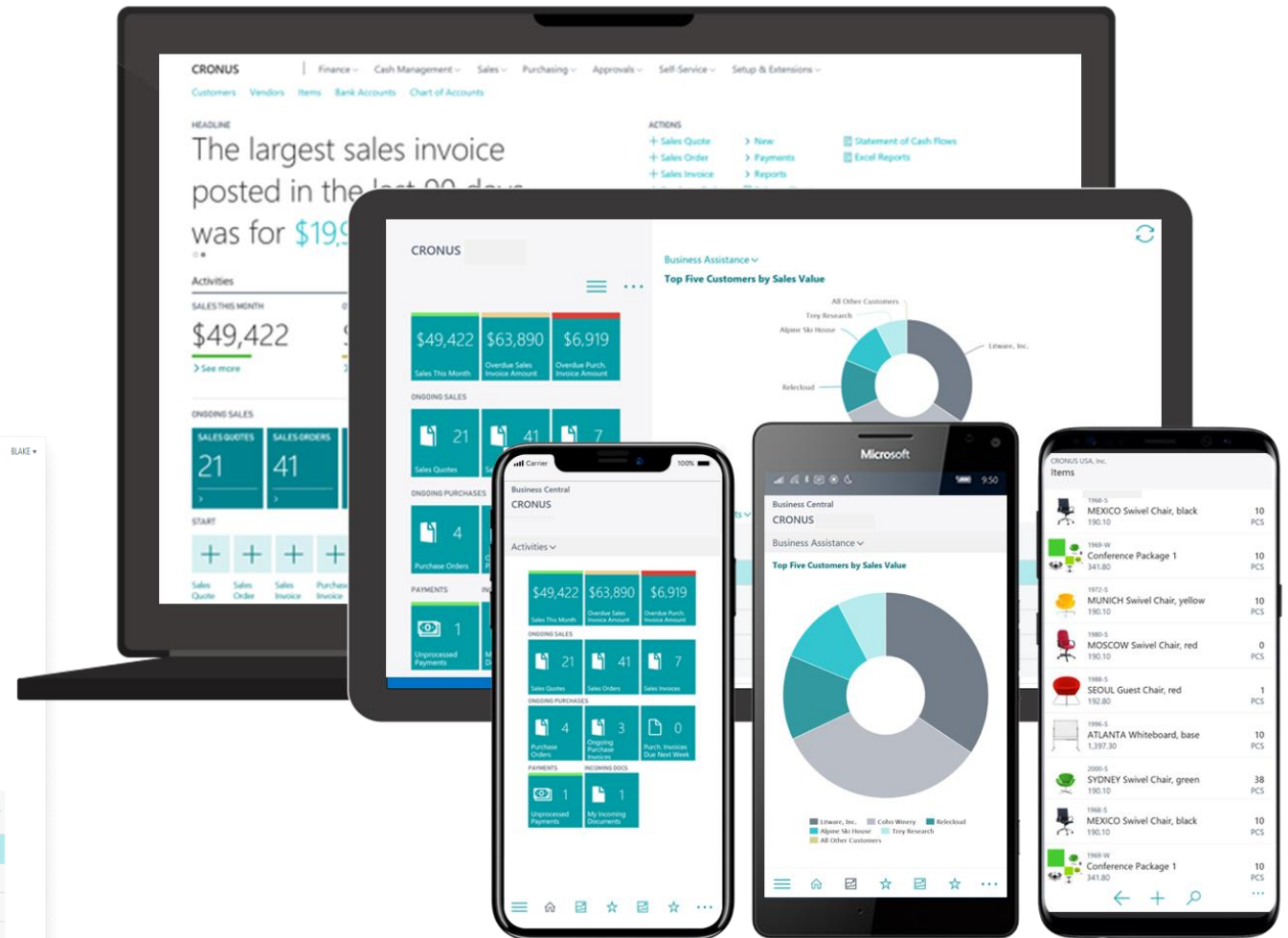
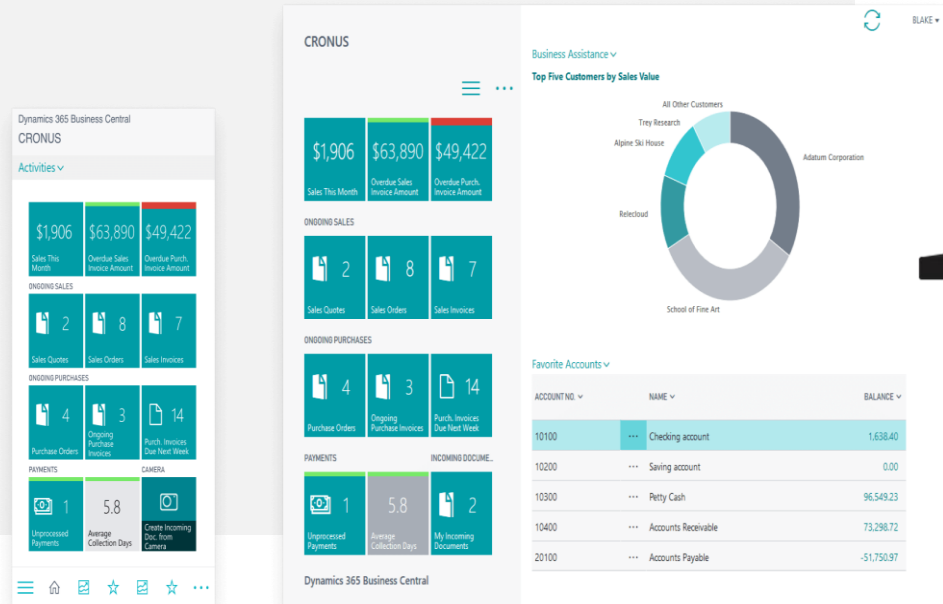
Create workflows to automate processes based on key events or actions to ensure activities are carried out without the need for manual intervention.

Set up routines to process batches which can be scheduled to run at a time that best meets the needs of your business.

Efficiency – Run Your Business Anywhere

Get the same user experience no matter how you deploy—in the cloud, on-premises, or a combination of both.

Take your business on the go with a consistent, intuitive experience across Windows, Android, or iOS devices for mobile access to Business Central.



Compliance— GDPR & MTD

Respect your customers’ right to privacy and set up your business to comply with the General Data Protection Regulation (GDPR). Grant and restrict access to personal data on multiple levels and implement audit trails to ensure security and accountability.

Handle, store, and transmit data securely across your systems while protecting it from unauthorized access with automatic Microsoft datacenter encryption.

MTD

- Retrieve VAT obligations from HMRC
- Get reminded about VAT obligations that are approaching or already past due
- Submit VAT returns to HMRC
- View the VAT return
- View VAT payments with HMRC
- View VAT liabilities with HMRC

Search Manage Process

FIELD NO	TABLE CAPTION
8005	G/L Entry
1	Customer
2	Customer
3	Customer
4	Customer
5	Customer
6	Customer
7	Customer
8	Customer
9	Customer
10	Customer

Set Up I
Set as S
Set as P
Set as N
Set as C
Show Fi

Data Classifications: All Search Manage Process View Page Actions Show fewer

TABLE NO	FIELD NO	TABLE CAPTION	CAPTION	FIELD TYPE	DATA SENSITIVITY	LAST MODIFIED BY	LAST MODIFIED
17	8005	G/L Entry	Modified DateTime	DateTime	Company Confide...		
18	1	Customer		Code	Normal		
18	2	Customer		Text	Personal		
18	3	Customer		Code	Personal		
18	4	Customer		Text	Personal		
18	5	Customer		Text	Personal		
18	6	Customer	Address 2	Text	Personal		
18	7	Customer	City	Text	Personal		
18	8	Customer	Contact	Text	Personal		
18	9	Customer	Phone No.	Text	Personal		
18	10	Customer	Telex No.	Text	Personal		
18	11	Customer	Document Sending Profile	Code	Normal		
18	14	Customer	Our Account No.	Text	Normal		
18	15	Customer	Territory Code	Code	Normal		
18	16	Customer	Global Dimension 1 Code	Code	Normal		
18	17	Customer	Global Dimension 2 Code	Code	Normal		
18	18	Customer	Chain Name	Code	Normal		
18	19	Customer	Budgeted Amount	Decimal	Normal		

VAT RETURN

Your VAT return is overdue since 07/08/17 (968 days)

Activities

Activities

SALES THIS MONTH

OVERDUE SALES INVOICE AMOUNT

OVERDUE PURCH. INVOICE AMOUNT

SALES INVOICES PREDICT... OVERDUE

£202,152

£10,858

£110,210

0

> See more

> See more

> See more

> See more

ACTIONS

+ Sales Quote

+ Sales Order

+ Sales Invoice

+ Purchase Quote

+ Purchase Order

+ Purchase Invoice

Additional D365 BC Features and Integration with the Microsoft Stack



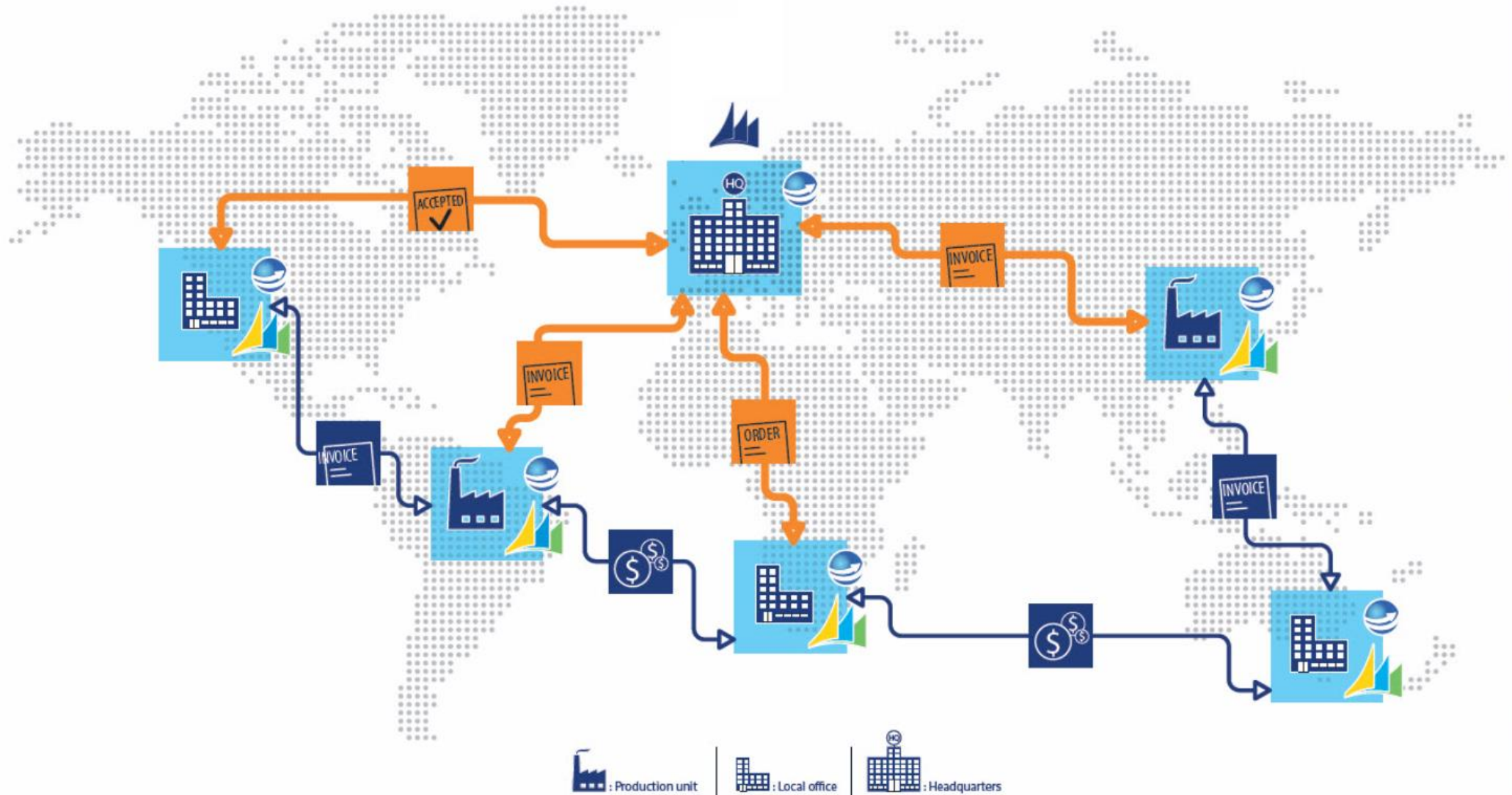
Extended Solution Overview



D365 BC – Core Solution

- **Office 365** – Integrate outlook with BC / CE to enable contact insights and create sales and purchase functions
- **Ecommerce** – integration into BC
- **D365 Sales** – Integration to BC – out of the box integration through CDS
- **Apps** – apps identified to help extend BC and CE functionality
- **Modifications** – Through Extensions, of required
- **Integrations** – e.g 3rd party logistics
- **Power BI &/or Jet Reports** - Business Intelligence dashboards created and viewed directly within BC or through Office 365

BC Multi Company / Multi Country Setups



Dynamics 365 Business Central



Sales



Finance



Marketing



Purchasing



Manufacturing



Warehouse



Jobs &
Resource
Planning



Service

Productivity



Office 365



Hololens

Connectivity



Common
Data Service



Flow



Azure IoT

Mobility



Power Apps

Insight



Cortana
Intelligence
Suite



Power BI

AppSource



ISV's

