folio3

Rapid Discovery Session

Microsoft Dynamics 365

Microsoft Dynamics 365
Business Central

Disclaimer

INFORMATION IN THIS PRESENTATION IS PROVIDED IN CONNECTION WITH FOLIO3 SOFTWARE INC.'s PRODUCTS. NO LICENSE, EXPRESS OR IMPLIED BY ESTOPPEL OR OTHERWISE, TO ANY INTELLECTUAL PROPERTY RIGHTS IS GRANTED BY THIS DOCUMENT OR PRESENTATION EXCEPT AS PROVIDED IN FOLIO3'S TERMS AND CONDITIONS OF SALE FOR SUCH PRODUCTS. FOLIO3 ASSUMES NO LIABILITY WHATSOEVER, AND FOLIO3 DISCLAIMS ANY EXPRESS OR IMPLIED WARRANTY, RELATING TO SALE AND/OR USE OF FOLIO3'S PRODUCT. MICROSOFT DYNAMICS 365 FINANCE & SUPPLY CHAIN AND MICROSOFT DYNAMICS 365 BUSINESS CENTRAL IS A TRADEMARK AND REGISTERED PRODUCT OF MICROSOFT CORPORATION. F3 CONNECTOR AND AGRIERP IS A REGISTERED PRODUCT AND INTELLECTUAL PROPERTY OF FOLIO3 SOFTWARE INC.

ANY INFORMATION SHARED IN THIS PRESENTATION/DOCUMENT WILL BE FOR MERE PURPOSE OF DEMONSTRATION OF THE SAID SOLUTION TO THE PROSPECTIVE CLIENTS. FOLIO3 RESERVE THE RIGHT TO CLAIM ANY INFRINGEMENT OF ANY PATENT, COPYRIGHT OR OTHER INTELLECTUAL PROPERTY RIGHTS ASSOCIATED WITH-IN THE SAID PRESENTATION/DOCUMENT. FOLIO3 SOFTWARE INC. MAY MAKE CHANGES TO SPECIFICATIONS AND PRODUCT DESCRIPTIONS AT ANY TIME WITHOUT NOTICE.

ALL PRODUCTS, INFORMATION, DATES AND FIGURES SPECIFIED ARE PRELIMINARY BASED ON CURRENT EXPECTATIONS, AND ARE SUBJECT TO CHANGE WITHOUT NOTICE.

Agenda

- Introduction About Folio3
- Folio3's Microsoft Dynamics Expertise
- Customer Success Stories
- Rapid Discovery Session
- Microsoft Dynamics 365 Ecosystem
- Why Microsoft Dynamics 365 Business Central ?
- Methodology
- Q/A Session

folio3

At a Glance

We are Silicon Valley entrepreneurs, MIT techies, Fortune 500 alums, and user-obsessed designers.

We are big believers in technology's potential.

We are bigger believers in human potential.

18+

Years Experience

With large enterprises, SMEs and startups

500+

Clients

From 2-person startups to Fortune 500 companies that love us enough to be our best spokespersons

2000+

Solutions

AI, Cloud, Web, eCommerce, iOT, and Mobile

800+

Employees

Across USA, UK, Canada, Mexico, Pakistan, Bulgaria, UAE and Australia

Meet Us

Over 800 people
across 8 countries

Adnan Lawai
CEO
Silicon Graphics,
Clickmarks
BS & MS, MIT

Umair Khan
Executive Chairman
UC Berkeley,
Mentors Fund
BS & MS, MIT

Shahid Azeem
Managing Director
UK/EU

Gareth Potter
Sales Director
UK/EU

Charles Thevenet
US Sales

Estela Gil
Mexico Operations

Muhammad Abdullah
Canada Operations

Anwar Rizvi
UAE Operations

Every company is a digital company.

Every company exists to build and sell solutions, and to scale.

Folio3 helps you build and sell and scale – digitally.

Entrepreneurial

Your Tech Co-founder

Value Obsessed

Lean Startup Approach

User Centric

User-focused Design

“Must-have” Innovation

Holistic

Strategy, Design, and Implementation in ONE place

The 3 in folio3

1. Digital Innovation

We help innovators **BUILD** world class products and solutions:

- we help entrepreneurs take their idea to MVP and beyond
- we help companies digitally transform their businesses for customers and employees

Expertise

- Mobile and Web Apps Solutions
- AI & Machine Learning
- Data & Analytics
- Cloud Computing
- Dev Ops
- Internet of Things (IoT)

BUILD

2. Digital Sales & Marketing

We help companies **SELL** their offerings more effectively:

- we help your marketing team reach, excite and understand customers
- we help your sales team win clients

Expertise

- eCommerce Implementations
- CRM Platforms
- Sales & Marketing Analytics
- SEO/SEM
- Content & Email Marketing
- Social Media Marketing

SELL

3. Digital Infrastructure

We help companies **SCALE** their business with growth platforms:

- Implementation, integration, and customization of ERP, CRM, Ecommerce, and BI platforms
- Your one stop, cost-effective, highly experienced partner in cloud-based growth infrastructure

Expertise

- Oracle-Netsuite
- MS Dynamics
- PowerBI
- SuiteAnalytics
- Salesforce
- Magento
- BigCommerce
- Shopify
- WooCommerce
- Twilio

SCALE

Some of Our Clients

folio3

Microsoft Dynamics Expertise

Microsoft | Dynamics 365

What We Do

A global Microsoft Gold Partner with over 12 years of experience and a one-stop shop for all your Microsoft Dynamics needs.

Gold

Microsoft Partner

Gold Enterprise Resource Planning
Silver Data Analytics
Silver Application Development
Cloud Solutions Provider

Mobility

6 Apps | 20+ Custom Apps

Integration

31 Connectors | 22+ Custom Integrations

Implementation & Customization

Expertise on AX 2009, 2012 & 365 | Multiple Deployments
Business Central | F & O

Business Intelligence

6 Pre-built Dashboards | 20+ Custom Cubes Developed

Dynamics Practice Areas

Implementation	Customizations	Integration	eCommerce	Mobility
Proven method, technical expertise, business knowledge, project management	Within Dynamics, Scripts, Reporting Solutions	On-Platform, Salesforce, Marketplaces, 3PLs, Custom.	Shopify, Magento web stores.	Prebuilt or Custom IOS or Android to Dynamics App.

Digital & App Innovation

Modern Work

Business Applications

Data & AI

Infrastructure & Security

folio3 Solutions and Products Offerings
Microsoft Dynamics

ERP

Microsoft Dynamics 365

Finance & Supply Chain

Business Central

agrierp

DocuScan

Power Apps

Expense

Approvals

Timesheet

Warehouse

Purchasing

Microsoft Solutions

Azure

Power bi

Power Apps

Office 365

Connectors Burq.IO

Walmart

DHL

salesforce

BURQ.io

WOO

ebay

FedEx

Folio3's Microsoft Team

A global Microsoft Gold Partner with over 12 years of experience and a one-stop shop for all your Microsoft needs. Folio3 is a Global Cloud Solution Provider for Microsoft with resources across the world.

With a Team of More than **200+** Microsoft Certified Professionals.

- ✓ 20+ Solution Architects
- ✓ 20+ Technical Architects
- ✓ 30+ Project Managers
- ✓ 40+ Dynamics Technical and Functional Consultants
- ✓ 50+ Quality Assurance Engineers and DevOps
- ✓ 50+ Certified Microsoft Dynamics Developers

Gold Microsoft Partner

Microsoft

Cloud Solutions Provider (6)
Gold Enterprise Resource Planning
Silver Data Analytics
Silver Applications Development

Folio3's Microsoft Team

Microsoft Dynamics 365 and Postmodern ERP Implementations with Integrations & Mobility

Apps

Leveraging the supremacy of Microsoft PowerApps or Native Apps. Folio3's suite of mobility solution covers, workflow approvals, expense, timesheets and CRM. It supports AX/D365 Security framework and also support for offline data and role based authorization.

Integration

Folio3 has a proprietary integration middleware framework, which lets you connect Dynamics 365 with any platform outside system. It is an easy-to-setup, light-weight & smart EDI framework. Based on a highly scalable and reliable architecture.

Analytics

PowerBI and custom reporting features let you have a real-time monitoring advantage. With deep expertise in Data Warehousing and PowerBI. We have Pre-built, ready to be deployed Reports/ Dashboards suited for different roles.

Integration Solutions: F3 Connectors

E-Commerce Platforms

Magento An Adobe Company | shopify | WOOCOMMERCE | BIGCOMMERCE | salesforce commerce cloud | shopware

Marketplaces

amazon | Walmart | ebay | JOOR

Shipping Software

ShipStation | shippit

Other Supported Integrations

FedEx | ADS | C.H. ROBINSON | channeladvisor | TrueCommerce | SPS COMMERCE

Payment Integration

PayPal | stripe | VISA | mastercard | maestro | AMERICAN EXPRESS | Authorize.Net

folio3

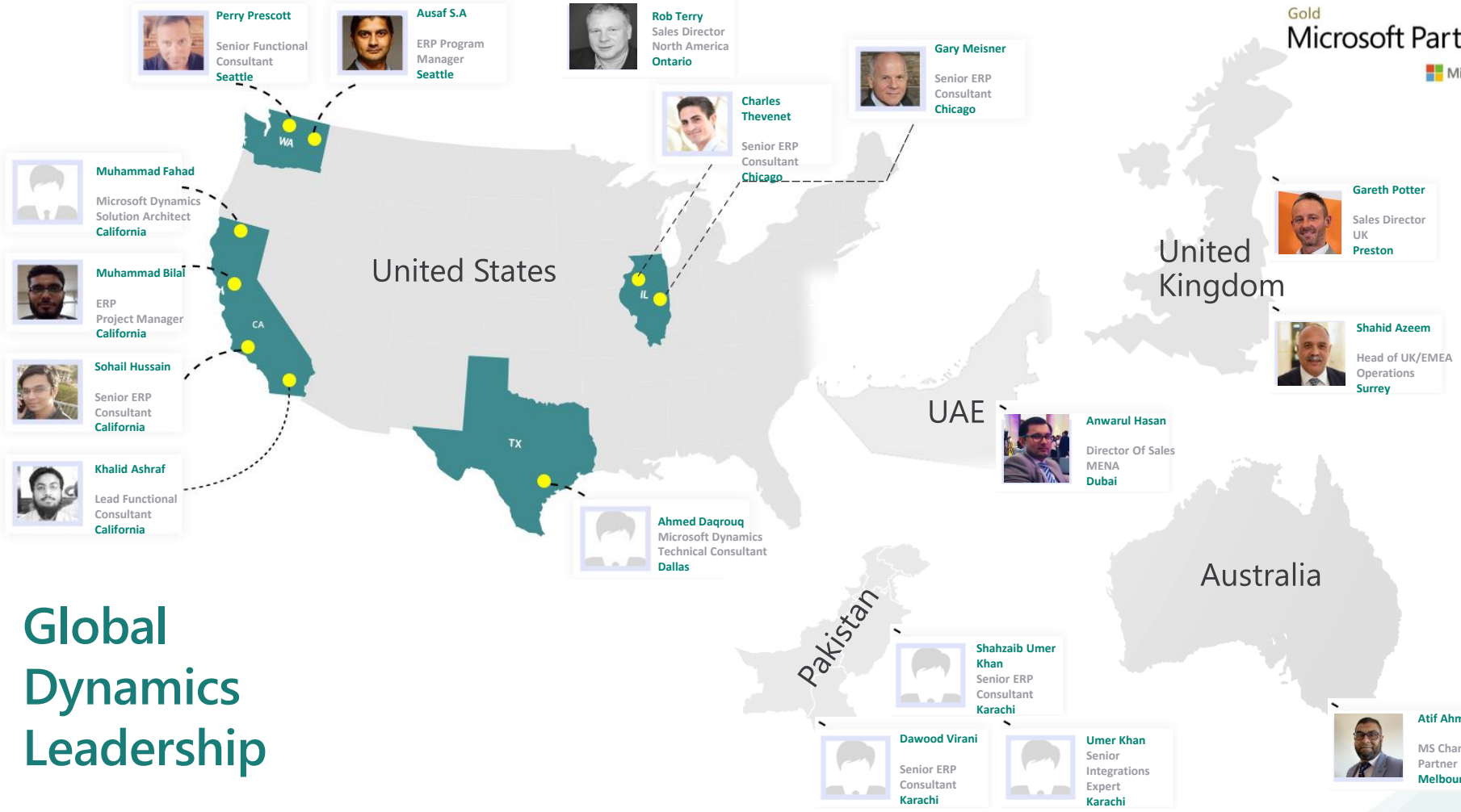
Folio3 Clients

Dynamics Clientele

Global Dynamics Leadership

Gold Microsoft Partner

Microsoft



Customer Success Stories

Microsoft | Dynamics 365

Digital transformation for a UK based pharmaceutical company for their end-to-end business operations

CBD Capital

NATURALIS LONDON

CBD Capital is a global CBD supplier distributing internationally-accredited, pharmaceutical-grade, wholesale phytocannabinoid products to leaders in the global cannabidiol industry.

Folio3 provided them with an end-to-end implementation of Microsoft Dynamics 365 Business Central along with Sales, Marketing and Customer Service. To streamline their business activities from a complete production to sales cycle.

Products and services

Microsoft Dynamics 365

- Business Central
- CRM
  - Sales
  - Marketing
  - Customer Service

Organization size

Small (50 - 100) employees)

Industry

Pharmaceutical

Location

Surrey, UK

Company Type

Privately Held

Folio3 provided CBD Capital and Naturalis London with the core implementation of Microsoft Dynamics 365 Business Central, Sales, Marketing and Customer Service as part of a complete Digital Transformation for their business operations which includes end-to-end CRM capabilities of Microsoft Dynamics 365 including Sales, Marketing and Customer Service. The whole Microsoft Stack will act as a seamless enterprise-wide application.

Enabled the app users to have a more streamlined and enjoyable experience

Savills (UK)

Savills is a global real estate services provider with a network of more than 35,000 people in over 600 offices across the Americas, Europe, Asia Pacific, Africa and the Middle East.

Savills found itself facing various issues with their Timesheet App for iOS, as it had very limited functionality. While the software was lacking basic attributes that Timesheets need, Savills further needed additional features to handle their nature of work.

Products and services	Organization size	Industry	Country	Company Type
Folio3's Suite of Apps	Large (10,000+) employees	Real Estate	London, UK	Public Company

Savills Timesheet App Upgrade and Improvements by Folio3 Enables App Users to Have a More Streamlined and Enjoyable Experience, Considerably Boosting Productivity. With the increased streamlining and efficiency provided by Folio3, Savills has been able to improve their Timesheet app considerably. Enabled service lines associated with a particular instruction so that they can be downloaded from central Timesheets to the Timesheets app.

Sales and Marketing Cycle improved by a quality Mobile Solution by Folio3

SportsWear International Ltd. (U.K.)

One of the leading school uniform and sportswear suppliers in the UK. Their passion for innovation has totally transformed the quality, style and fit of schoolwear - and our customer service is second to none.

So SWI started a revolution based on innovation. From day one we've been on a mission to make school uniform and sportswear that's fit for purpose with innovative designs, innovative fabrics and customer service that's second to none.

Products and services	Organization size	Industry	Location	Company Type
Folio3 DynAX CRM App	Small (Less than 500) employees	Apparel & Fashion	Cheshire, UK	Public Limited

Folio3 delivered its proprietary AX CRM App named as DynAX that was compatible with AX 2012, this allowed SWI UK to manage their leads, customers, opportunities, sales and the whole marketing data for sales and marketing cycle which is tied back to their Dynamics AX 2012. This all is managed through Folio3's AX Mobile App – DynAX.

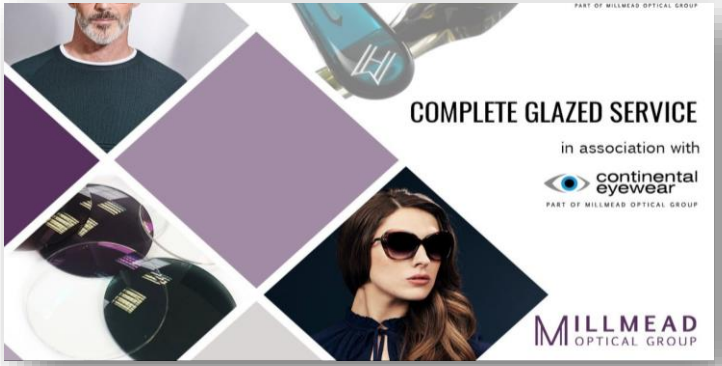
An integration solution to synchronize their web-store with their ERP

MILLMEAD OPTICAL GROUP

Millmead Optical Group

Millmead Optical Group (formerly Yakira Group) combines over 70 years of industry experience across eyewear, lenses and accessories. Today the company remains a family run business retaining its independent values. The company is proud to provide our customers with high quality, well designed products with a reputation for reliability and integrity.

With operations in London, Liverpool, Stuttgart and Hong Kong, Millmead operates throughout the global market.



Products and services	Organization size	Industry	Location	Company Type
Business Central Integration with Shopify	Medium (Approx. 500) employees	Apparel & Fashion	Maghull, UK	Private Limited

Folio3 delivered its proprietary NAVCom Integration solution through its proprietary framework to integrate Shopify Store with their Microsoft Dynamics 365 Business Central, synchronizing their sales order, customers, sales, product updates etc.

A streamlined solution to improve accessibility and efficient processes

Bottomline Technologies (NASDAQ: EPAY) helps make complex business payments simple, smart, and secure.

Corporations and banks rely on Bottomline for domestic and international payments, efficient cash management, automated workflows for payment processing and bill review, and state of the art fraud detection, behavioral analytics and regulatory compliance solutions.

Products and services	Organization size	Industry	Location	Company Type
Folio3 AX Workflow Approvals App	Large (1001- 5000) employees	Computer Software	Portsmouth, NH	Public Limited

Folio3 delivered a customized AX Workflow Approvals App that was compatible with AX 2012, this allowed Bottomline Technologies users to access and manage workflow approval requests from their mobile devices across the globe.

A comprehensive solution for improved accessibility and streamline processes

Honda R&D Europe (U.K.) Ltd.

One of the largest manufacturer's of automobiles, aircraft, motorcycles and power equipment with global yearly sales in access of $120 Billion.

Honda wanted a reliable and customized AX Workflow Approval mobile solution that provided approval / rejection capabilities for all workflow types including purchase orders, purchase requisitions and finance.

Products and services	Organization size	Industry	Location	Company Type
Folio3 AX Workflow Approvals App	Large (1001- 5000) employees	Automotive	Swindon, UK	Public Limited

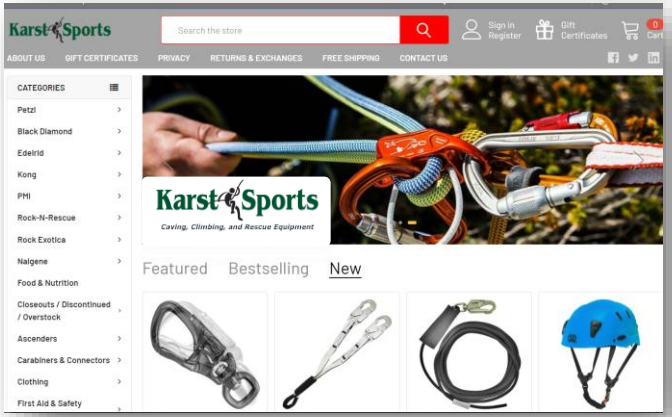
Folio3 delivered a customized AX Workflow Approvals App that was compatible with AX 2012, this allowed existing Honda users to access and manage workflow approval requests from their mobile devices.

Automating the Sales and Inventory of a Outdoor Equipment Retailer with an empowering ERP Solution

Karst Sports

Karst Sports is a merchandiser of caving, rescue, climbing and other outdoor equipment. They have been in this business since 1993 and has been selling by way of the Internet since early 1994.

Based out of Fairmont, West Virginia, Karst Sports is a four decade old company, which has been owned by the same family with three different generations being involved over the years. Folio3 successfully implemented Microsoft's Dynamics 365 Business Central ERP with Folio3's F3 Connector for Integrating their ecommerce platforms on Amazon and BigCommerce.



Products and services

Microsoft Dynamics 365
- Business Central (ERP)

Folio3 Connector
- Amazon
- BigCommerce

Organization size

Small (5 - 10) employees)

Industry

Retailer, Outdoor equipment shop

Location

Fairmon, WV USA

Company Type

Privately Held

Folio3 provided services to implement an ERP solution at Karst Sports namely Microsoft Dynamics 365 Business Central and also provided them with Integration solution with their ecommerce platforms of Amazon Marketplaces and BigCommerce powered website streamlining and synchronizing automation of their core operations and sales cycle.

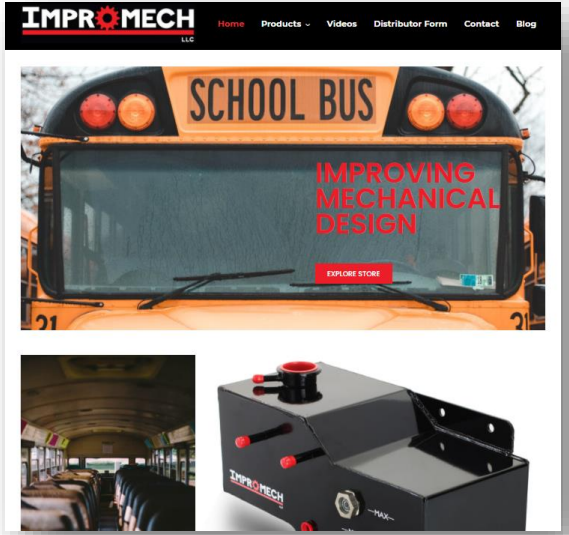
Improved Order Management and Financials for Automotive Services Company

IMPROMECH

Impromech LLC. serves the school bus maintenance and repair market through upgraded school bus parts. As they have developed products to help the fleets they work with, they want to share those solutions with other shops.

Based out of New Jersey and founded in 2014, Impromech LLC is determined to offer high quality and dependable bus parts for all interested school bus owners and operators.

Folio3 helped them with their ERP and Integration needs through Microsoft Dynamics 365 Business Central and Amazon Integration through Folio3's Integration Framework.



Products and services

Microsoft Dynamics 365
- Business Central (ERP)

Folio3 Connector
- Amazon

Organization size

Small (1 - 5) employees)

Industry

Automotive Services

Location

Georgia, NJ USA

Company Type

Privately Held

Folio3 provided services to implement an ERP solution at Impromech LLC with Microsoft's Dynamics 365 Business Central and also provided them with Integration solution with their ecommerce marketplace at Amazon streamlining and synchronizing automation of their core operations, fulfilment and sales cycle.

Improving the sales cycle of Tree growing company with migration and integration with Dynamics CRM

SuperTrees®

Based out of Canby, OR, SuperTrees Inc. grows over 200 varieties of plants and 50,000+ trees and is recognized as the go to source for quality. SuperTrees, has been growing plants since 2005. Co-Founders, Ben & Brant Walker, were among the first in the United States to adopt the method of growing trees in air-pruning containers.

Folio3 successfully migrated their existing ERP solution to Microsoft Dynamics 365 and also provided them with CRM solution mapping and integration with their Sales and Customer Service Dynamics 365 Apps.

Products and services

Microsoft Dynamics 365

- Business Central
- CRM
  - Sales
  - Customer Service

Organization size

Small (50 - 100) employees)

Industry

Health, Wellness & Fitness

Location

Canby, Oregon USA

Company Type

Privately Held

Folio3 provided services to migrate their existing ERP solution to Microsoft Dynamics 365 Business Central and also provided them with CRM solution mapping and integration with their Sales and Customer Service Dynamics 365 Apps streamlining their core operations and sales cycle.

Empowering Business Central with end-to-end integration solution for stores

ASSEMBLY LABEL

Assembly Label is an Australian apparel and accessories brand, born from a desire to create well-made products that embody the relaxed, Australian coastal lifestyle. Established in 2011 by cofounders Damien Horan and Daniel Oliver, Now stocked in over 200 stores worldwide, Assembly Label prides itself on being the epicenter for wardrobe essentials for both men and women.

Folio3 provided them with cutting-edge end-to-end Business Central integration solution on multiple ecommerce platforms and marketplaces.

Products and services	Organization size	Industry	Location	Company Type
Business Central Integration with Shopify and JOOR	Medium (Approx. 100) employees	Apparel & Fashion	Rosebery, NSW Australia	Sole Proprietorship

Folio3 provided end-to-end integration services to Assembly Label with integrating their Microsoft Dynamics 365 Business Central with Shopify and JOOR stores. Folio3 delivered its proprietary middleware framework based NAVCom Integration solution to integrate their Shopify Store with their Microsoft Dynamics 365 Business Central, synchronizing their sales order, customers, sales, product updates etc.

Rapid Discovery Session

Are you outgrowing your current system?

- Siloed systems
- Duplicate data
- Manual processes
- Insufficient reporting
- Security issues

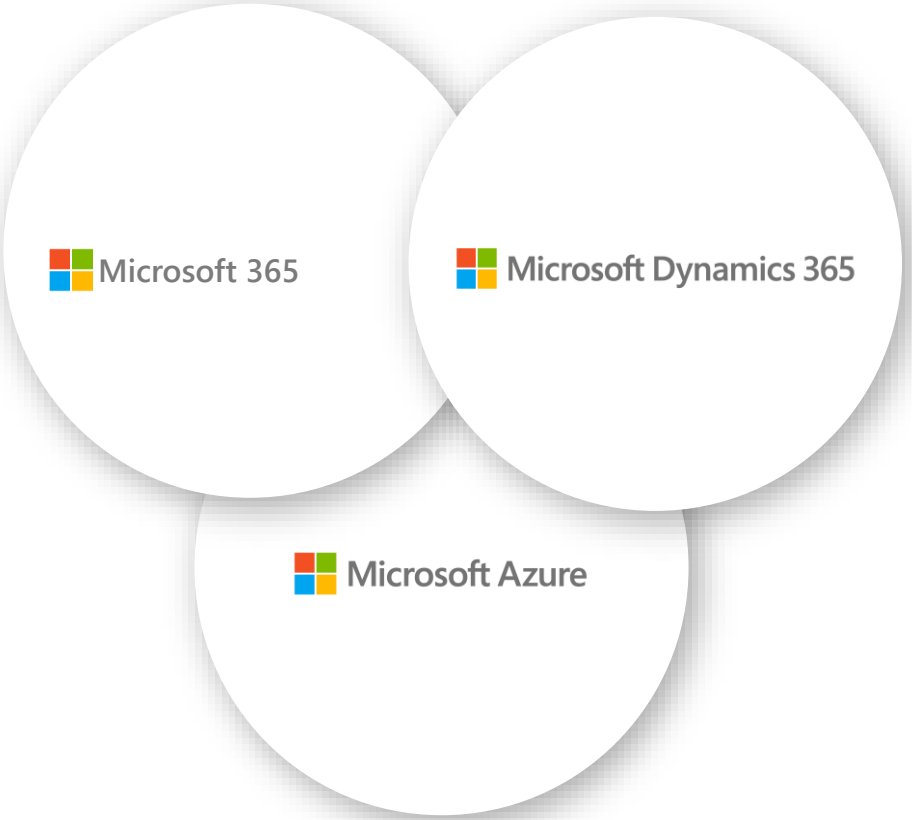
Microsoft Dynamics 365 Ecosystem

Microsoft cloud

Intelligent business applications

Productivity and collaboration

Open, flexible, enterprise-grade cloud computing platform



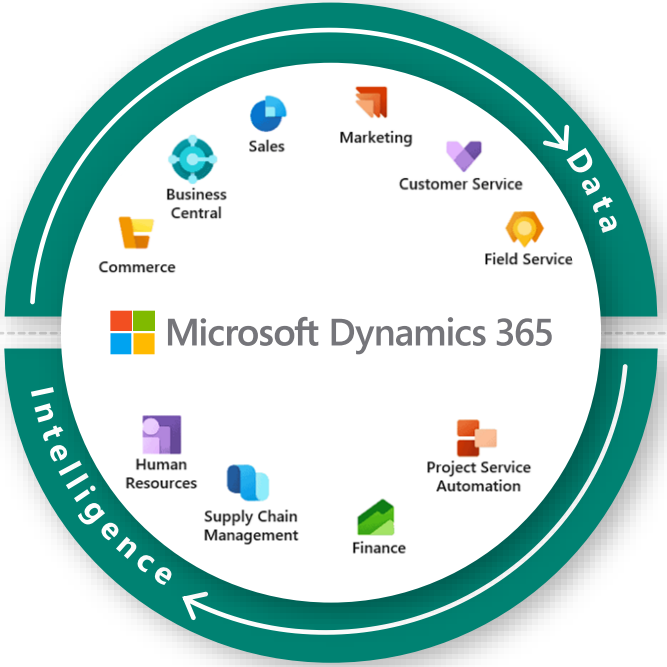
Harness the power of unified and intelligent data

Dynamics 365 + Office 365 + LinkedIn + Partner Solutions

Leverage the power of the Microsoft Dynamics 365

Modern

Unified



Intelligent

Adaptable

Power platform

Power BI

Flow

PowerApps

ERP SOLUTIONS

DYNAMICS 365 FINANCE
Finance management for medium and large sized companies

DYNAMICS 365 SUPPLY CHAIN MANAGEMENT
Supply chain management for medium and large sized companies

DYNAMICS 365 PROJECT OPERATIONS
Project management

DYNAMICS 365 COMMERCE
Retail management

DYNAMICS 365 HUMAN RESOURCES
Human resource management

DYNAMICS 365 BUSINESS CENTRAL
Enterprise resource management for small and medium sized companies

DYNAMICS 365 INTELLIGENT ORDER MANAGEMENT
Order management solution

CRM SOLUTIONS

DYNAMICS 365 SALES
Sales management solution

DYNAMICS 365 CUSTOMER SERVICE
Customer service management

DYNAMICS 365 CUSTOMER SERVICE PROFESSIONAL
Customer service management for professionals

DYNAMICS 365 FIELD SERVICE
Field service and maintenance management

DYNAMICS 365 MARKETING
Marketing management

AI SOLUTIONS

DYNAMICS 365 CUSTOMER INSIGHTS
Power personalized engagement with customer insights

DYNAMICS 365 CONNECTED SPACES
Real-time observational data to improve in-store operations

DYNAMICS 365 SUPPLY CHAIN INSIGHTS
AI-driven insights in supply chains

DYNAMICS 365 CUSTOMER SERVICE INSIGHTS
AI-driven insights and virtual agents in customer service

SERVICES

DYNAMICS 365 PLANNING OPTIMIZATION
External micro service for planning

INVENTORY VISIBILITY ADD-IN
External micro service for inventory

GLOBAL INVENTORY ACCOUNTING
External micro service for inventory accounting

REGULATORY CONFIGURATION SERVICE
Designer and lifecycle management service for no-code/low-code globalization functionality

ELECTRONIC INVOICING
External micro service to process & configure invoice documents

TAX CALCULATION SERVICE
External micro service for taxes

FINANCIAL DIMENSION SERVICE
External micro service for financial dimensions

RESOURCE SCHEDULING OPTIMIZATION ADD-IN
Extended schedule optimization solution

INTELLIGENT FULFILLMENT OPTIMIZATION
External micro service for fulfillment

YEAR-END CLOSE MICRO-SERVICE
External micro service for year-end closing

POWER PLATFORM

POWER AUTOMATE
Robotic process automation

POWER BI
Business intelligence solution

AI BUILDER
Artificial intelligence solution

POWER APPS
Business solutions tool

POWER VIRTUAL AGENT
Intelligent virtual agents

POWER APPS PORTALS
Portal management

MICROSOFT DATAVERSE
Cloud-based, low-code data service and app platform

POWER APPS MOBILE
Mobile solution for Power Apps

POWER PAGES
Low-code software as a service (SaaS) platform

Business Application Solution Ecosystem

Microsoft's Business Applications are built on **Azure**, using a **Common Data Model** that unifies data in **Dataverse**. **Power Platform** is the low code development platform for Microsoft's **Office 365, Teams, Dynamics 365** business applications (CRM & ERP) and integrates with **400+ services.**

64K+ Partners

Analyst Recognition:
1) Analytics & BI
2) API Management (Full Lifecycle)
3) Cloud DBMS
4) Cloud Infrastructure
5) Content Services Platforms
6) CRM Customer Engagement
7) CRM Customer Service Solutions
8) CRM Lead Management
9) CRM Sales Force Automation
10) Data Integration Tools
11) Data Science & ML
12) ERP (Cloud)
13) Iot (Industrial)
14) Low-Code App Platforms
15) Meeting Solutions
16) Robotic Process Automation (RPA)
17) Security: Access Management
18) Security: CASB
19) Security: Endpoint Protection
20) Security: Ent. Info Archiving
21) Security: Unified Endpoint Mgmt

Industry Solutions

1 AI Platform & MS Research (25+ years)

- 18,000+ AI Patents
- 2020 R&D: $19.2B
- Human Parity Cognitive Services
- Decision, Language, Speech, Vision, +

2 LinkedIn

- 720M+ Professionals
- Sales Navigator

3 Microsoft 365 — 135M+ Users

- Identity
- Outlook
- Teams — 150M+ Daily Active Users
- Office
- Sharepoint
- OneDrive
- Excel

4 Dynamics 365

- Marketing
- Sales
- Customer Service
- Virtual Agents
- Field Service
- Product Visualize
- Remote Assist
- Commerce
- Connected Store
- Fraud Protection
- Supply Chain
- Guides
- HR
- Finance
- Project Operations
- Business Central

5 Power Platform

- Power BI — 7M Users
- Power Apps
- Power Automate
- Power Virtual Agents
- Power Portals

Customer Data Platform (CDP)

- Customer Insights
- Customer Voice

6 Dataverse

- Dataverse for Teams
- Common Data Model
- Cloud Services APIs
- 400+ Connectors

SAP salesforce

7 Azure (600+ Services)

- AI & ML
- Analytics
- Blockchain
- Compute
- Containers
- Databases
- Dev Tools
- DevOps
- IoT
- Media
- Networking
- Security
- Storage

200+ Microsoft Services → **Microsoft Security Response Center** ← 7 Trillion cyber events daily = Threat Intelligence

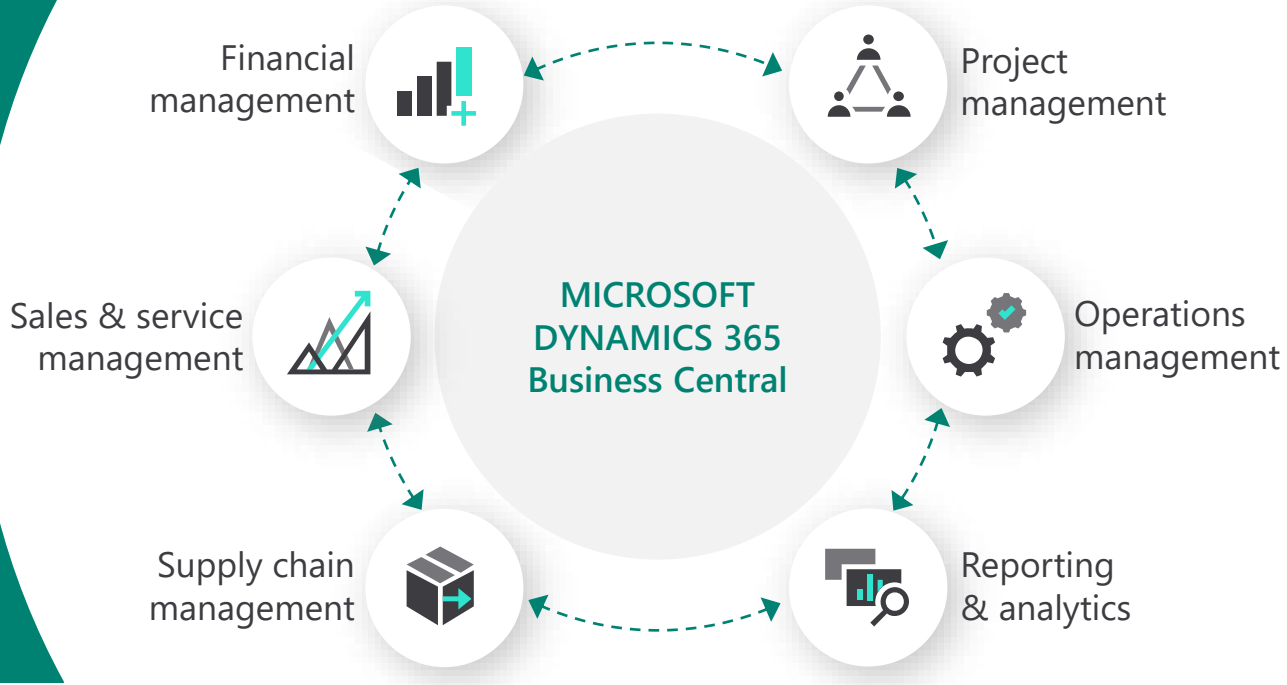
Security — Microsoft Trust Center — Compliance — Transparency

Why Business Central ?

A single, comprehensive solution to meet the needs of growing businesses

Automatically pull systems and processes together to manage financials, sales, service, and operations

Connect with 3rd party applications like payroll, banking, CRM, or industry-specific systems

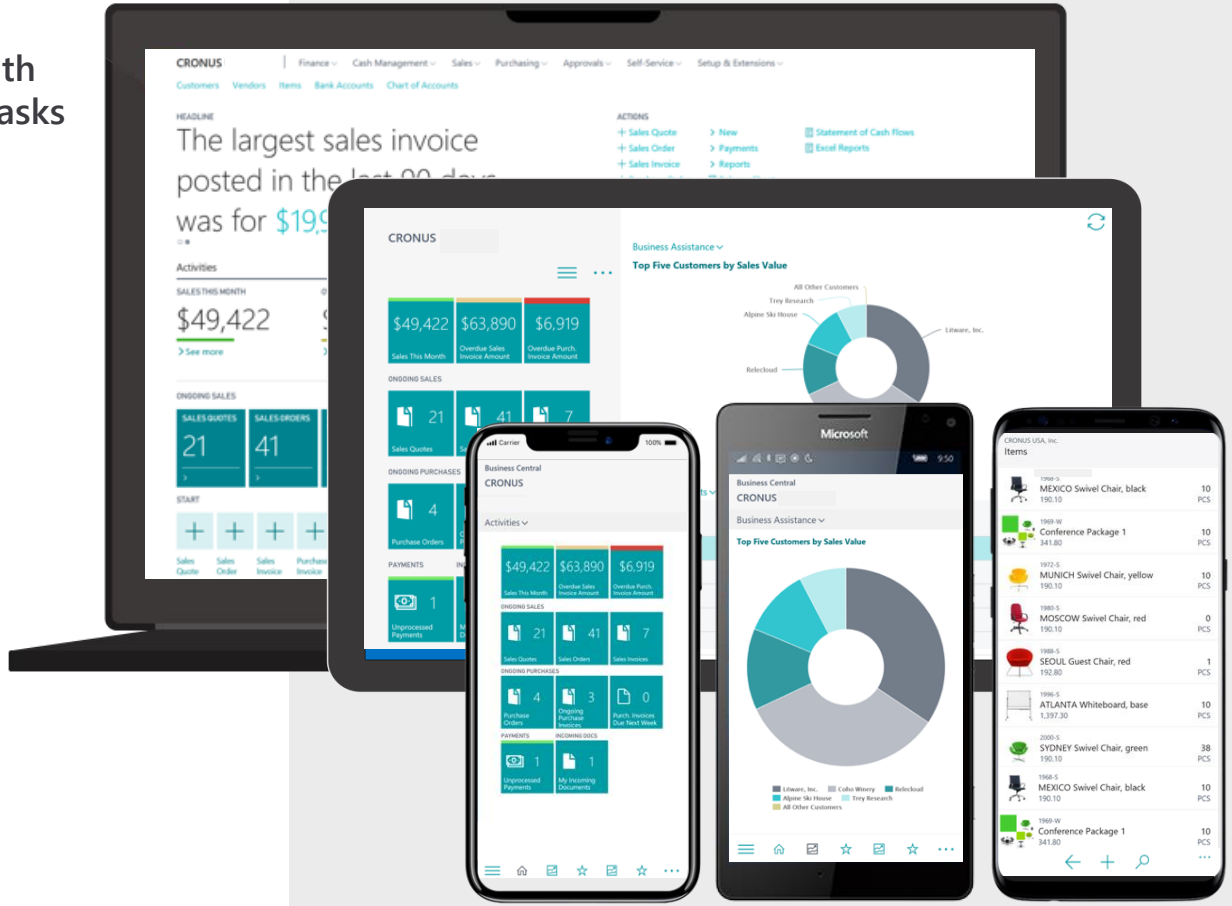


Adaptive Business Operations

Optimize your team's productivity with seamless, integrated processes and tasks

Run Your Business Anywhere

- Deploy in the Cloud or on-premises
- Flexible data residency, compliance and security
- Universal, mobile-enabled user experience across deployments and devices

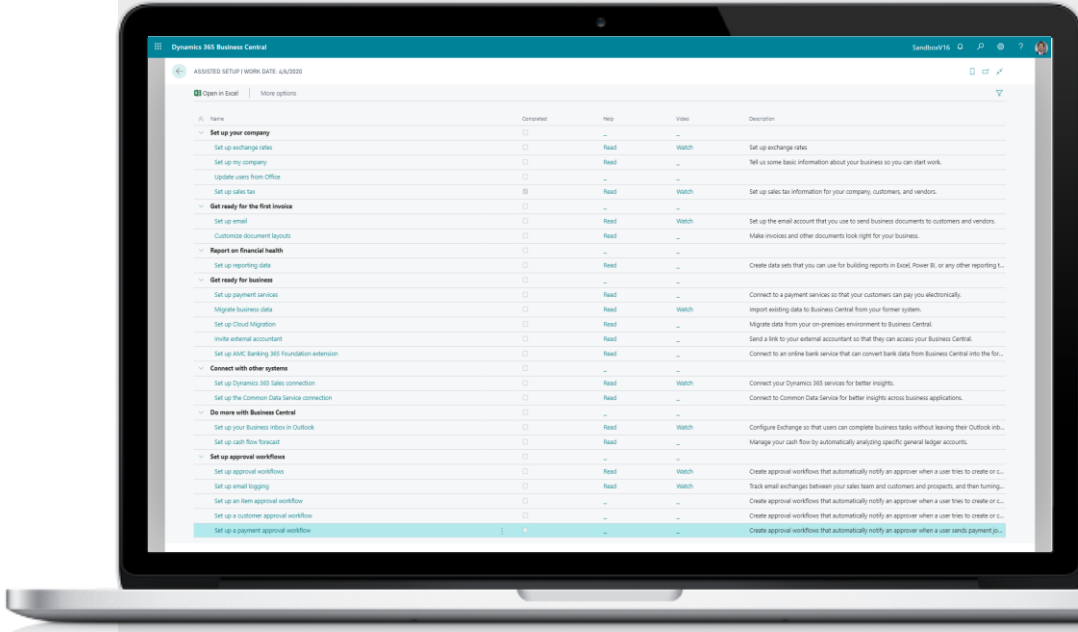


Adaptive Business Operations

Optimize your team's productivity with seamless, integrated processes and tasks

Guided Setup and Streamlined Search

- Intuitive Setup process guides users through initial setup with video learning assistance
- In Product Search, streamlines learning with quick access to the right windows while suggesting additional learning resources

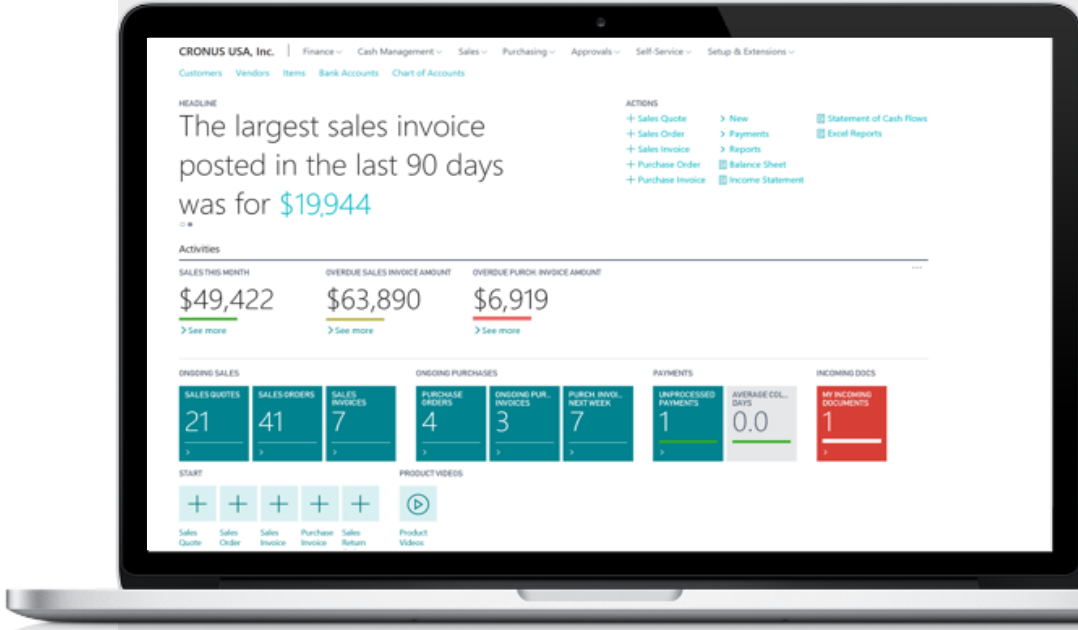


Adaptive Business Operations

Optimize your team's productivity with seamless, integrated processes and tasks

Role-based workspaces

- Enable fast user actions and decisions with role-based workspaces
- Gain global visibility into the financial health of your business
- Optimize workforce productivity

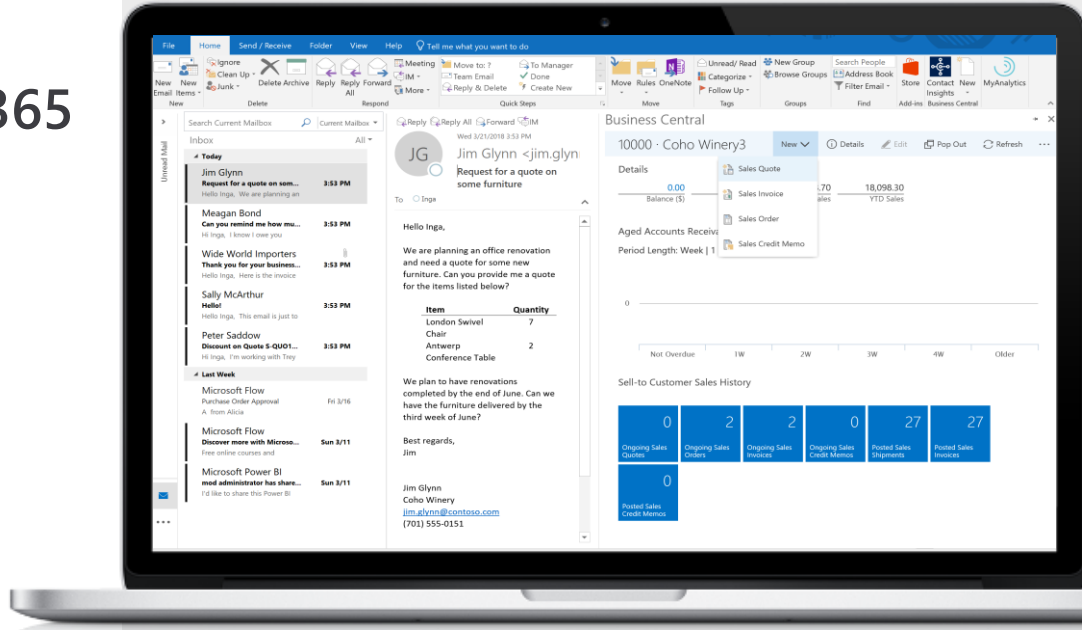


Adaptive Business Operations

Optimize your team's productivity with seamless, integrated processes and tasks

Embedded with Microsoft 365

- Quote to Cash all from within Outlook
- Process Orders and Submit Invoices without leaving Outlook
- Send your invoices as PDF attachments that include a PayPal link to expedite payments

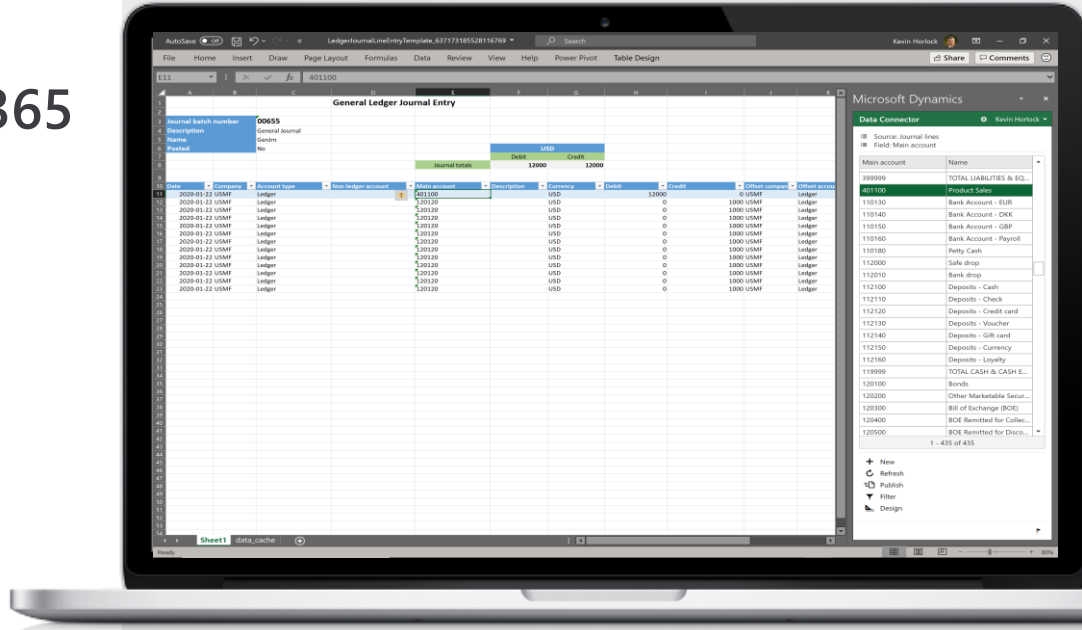


Adaptive Business Operations

Optimize your team's productivity with seamless, integrated processes and tasks

Embedded with Microsoft 365

- Easily export and update data in Microsoft Excel
- Mass change non-audit trail data like a salesperson code from Excel
- Want to create Journal Entries in Excel? No Problem

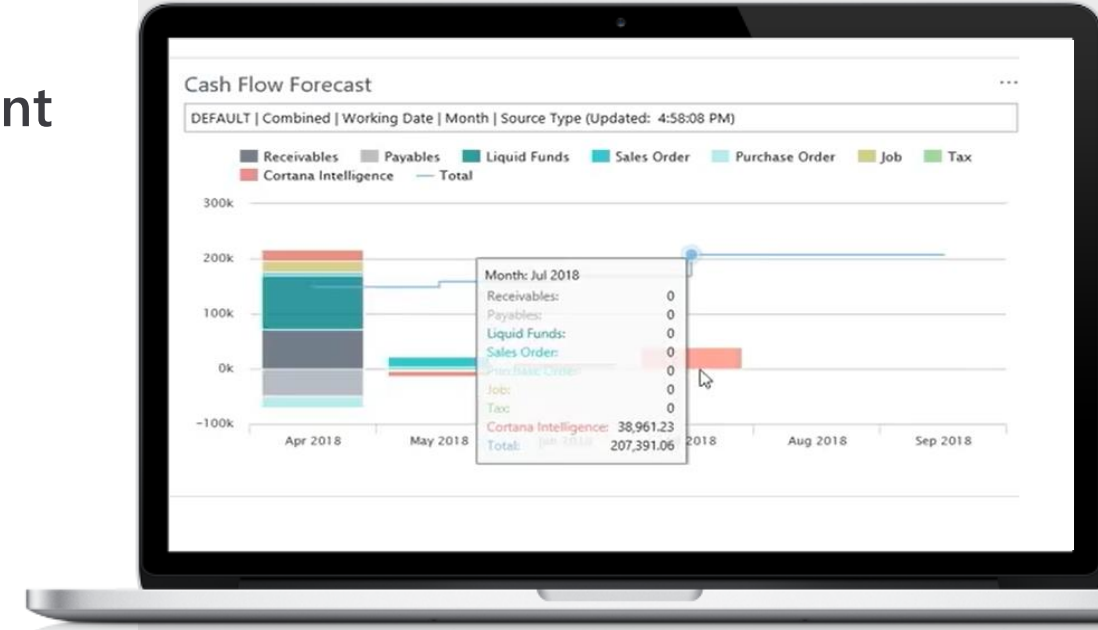


Adaptive Business Operations

Predictions

Cash Flow and Late Payment

- Create your own predictive web service Cash Flow Forecasting
- Late Payment Prediction can help you reduce outstanding receivables and fine-tune your collections strategy by predicting whether sales invoices will be paid on time

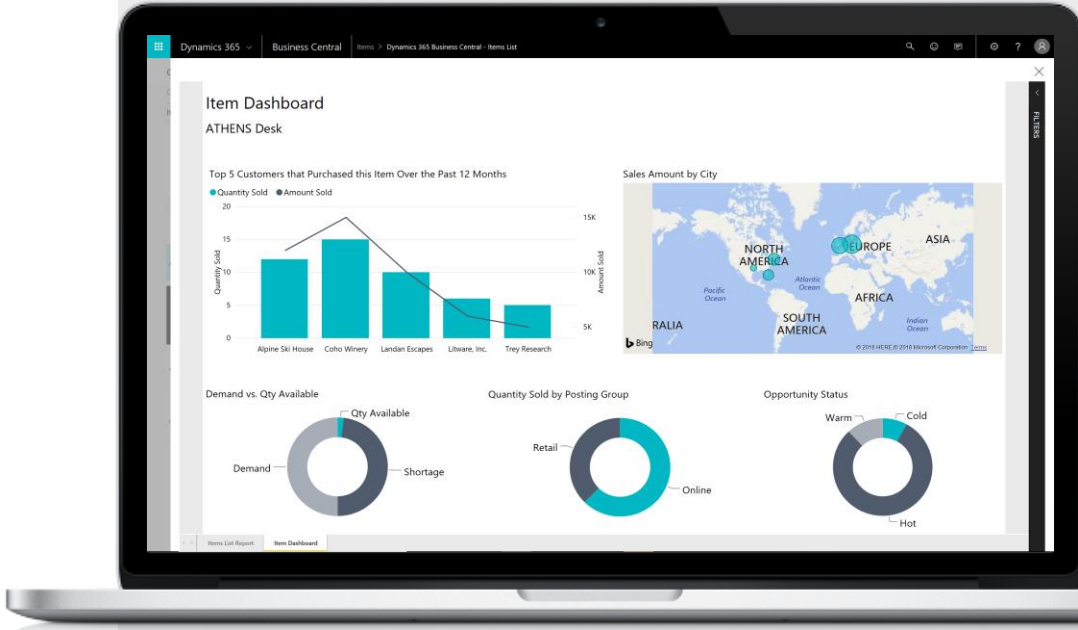


Adaptive Business Operations

Interactive Dashboards

Business Intelligence with Microsoft Power BI

- Derive insights from transactional and observational data and then get those insights into the hands of every employee to support decision making
- Create a data culture where every employee can make decisions based on facts, not opinions
- Create composites of reports from various other Power BI content together with actuals and budget balances from general ledger

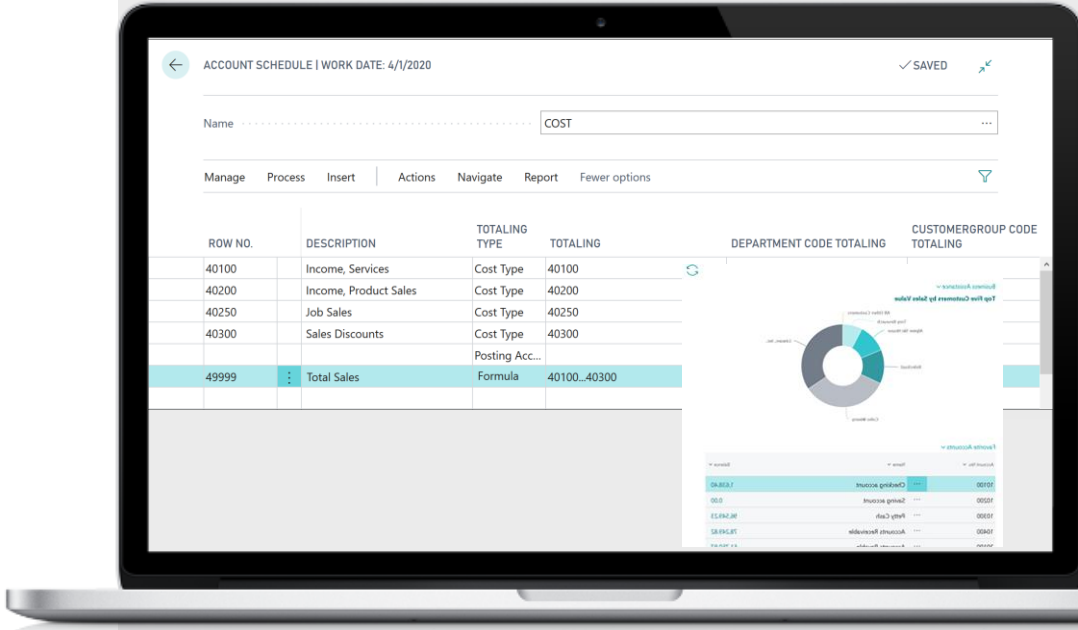


Adaptive Business Operations

Reporting

Dashboards and Reports

- Allow financial and business professionals to create, maintain, deploy, and view financial statements
- Design reports with more flexibility using out-of-the-box Report Designer
- Manage the generation and distribution of reports using financial report collaboration capabilities
- Use interactive report viewing to change different attributes and filters and find the report data you need



Microsoft Dynamics 365 Business Central

Core capabilities

Financial management	Account receivables/payables	Bank reconciliation	Fixed asset management	Month/year end closing
Sales and service management	Quote generation	Contact management	Sales invoicing	Payment processing
Project management	Capacity planning	Budgets and estimates	Job and process costing	Resource management
Supply chain management	Inventory and purchasing control	Shipment and distribution	Returns and cancellations	Procurement and vendor management
Operations management	Forecasting	Production planning	Manufacturing capacity	Warehouse management
Reporting and analytics	Customer insights	Self-serve reports	Interactive dashboards	Built-in intelligence

Core Features

Microsoft Dynamics 365 Business Central

Microsoft | Dynamics 365

Business Central Functionality - Essentials

Financial Management			
Account Schedules	Basic XBRL	Deferrals	Responsibility Centers
Allocations	Budgets	Electronic Payment/Direct Debits[1]	Unlimited Dimensions
Bank Account Management	Cash Flow Forecast	Fixed Assets	
Bank Reconciliation	Check Writing	Multiple Currencies	
Basic General Ledger	Consolidation	Payment Handling	
Advanced Financial Management			
Cost Accounting	Inter-company Postings		
Customer Relationship Management			
Business Inbox for Outlook	Contact Classification	Email Logging	Relationship Management
Campaign Management	Contact Management	Interaction/Document Management	Task Management
Campaign Pricing	Dynamics 365 Sales Integration[3]	Opportunity Management	
E-Services			
Bank Feeds (US, CA)	Document Management, Document Capture	Online Map	Tax. Reg. No. Validation Service (EU)[1]
Document Exchange Service		PayPal	
Human Resources Management			
Basic Human Resources			
Project Management			
Basic Resources	Job Quotes	Project Management Jobs	
Capacity Management	Multiple Costs	Time Sheet	

Business Central Functionality - Essentials

Supply Chain Management			
Alternative Order Addresses	Item Attributes	Purchase Invoicing	Sales Line Pricing
Alternative Ship-To Addresses	Item Budgets	Purchase Line Discounting	Sales Order Management
Alternative Vendors	Item Categories	Purchase Line Pricing	Sales Return Order Management
Assembly Management	Item Charges	Purchase Order Management	Sales Tax/VAT[4]
Basic Inventory	Item Cross References	Purchase Return Order Management	Shipping Agents
Basic Payables	Item Substitutions	Requisition Management	Standard Cost Worksheet
Basic Receivables	Item Tracking	Demand Forecasting	Stock keeping Units
Calendars	Location Transfers	Sales Invoice Discounts	Vendor Catalogue Items
Cycle Counting	Multiple Locations	Sales Invoicing	
Drop Shipments	Order Promising	Sales Line Discounting	
Warehouse Management and Inventory			
Automated Data Capture System	Internal Picks and Put Aways	Warehouse Shipment	Warehouse Receipt
Bin Set-Up	Pick	Warehouse Management Systems	
Other			
Analysis Reports	Intrastat[1]	Reason Codes	Workflow
Change Log	Job Queue	Unlimited Companies	Word reporting/Document reporting
Embedded Power BI	Notifications (on-premises only)	User Management	
Extended Text	Retention Policies	User Tasks	

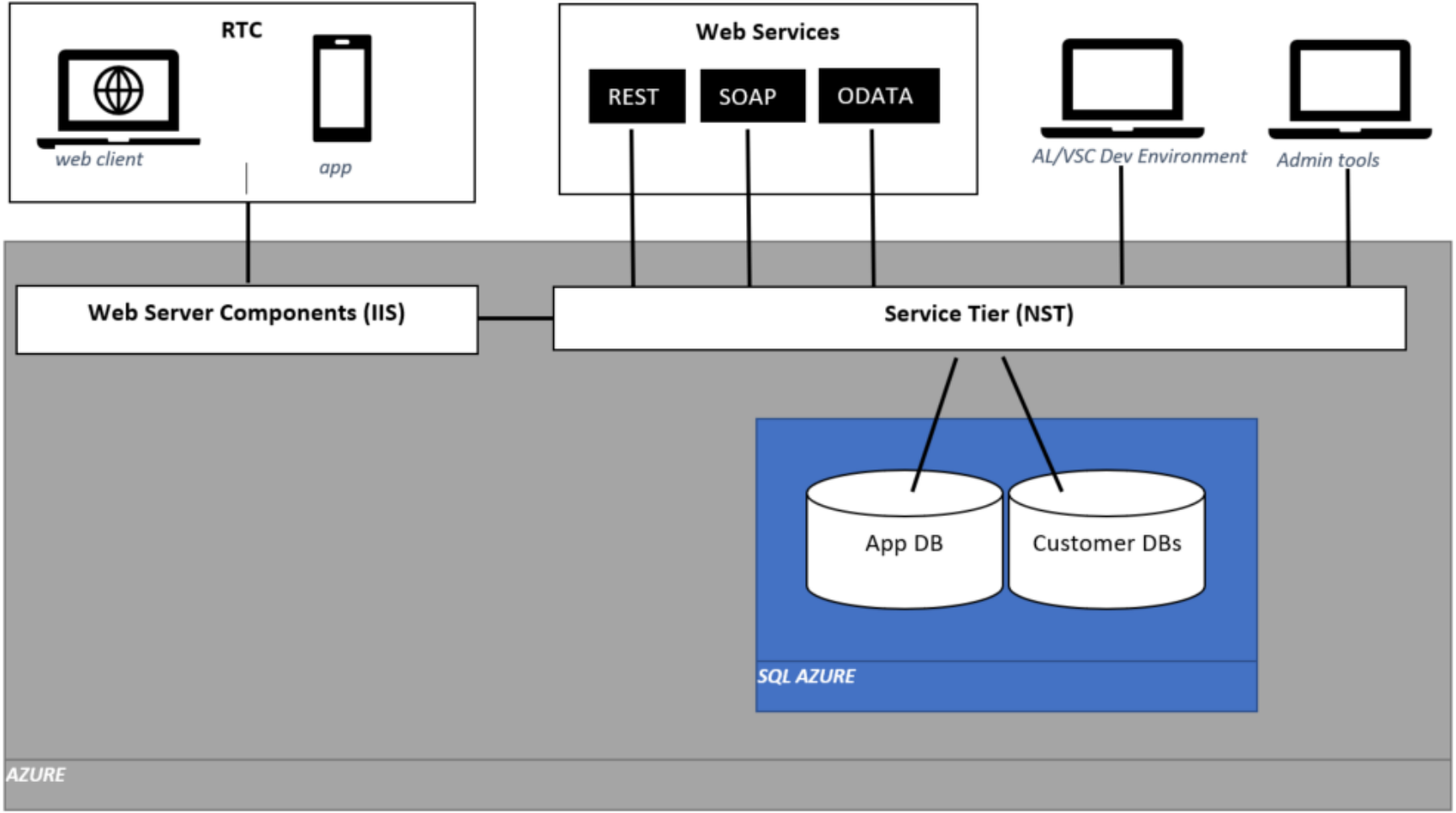
Business Central Functionality - Premium

Service Order Management		
Service Order Management	Service Item Management	Planning and Dispatching
Service Price Management	Service Contract Management	
Manufacturing		
Production Orders	Machine Centers	Finite Loading
Production Bill of Materials	Basic Supply Planning	Sales and Inventory Forecasting
Version Management	Basic Capacity Planning	Agile Manufacturing

Cloud Architecture

Microsoft Dynamics 365 Business Central

Microsoft | Dynamics 365



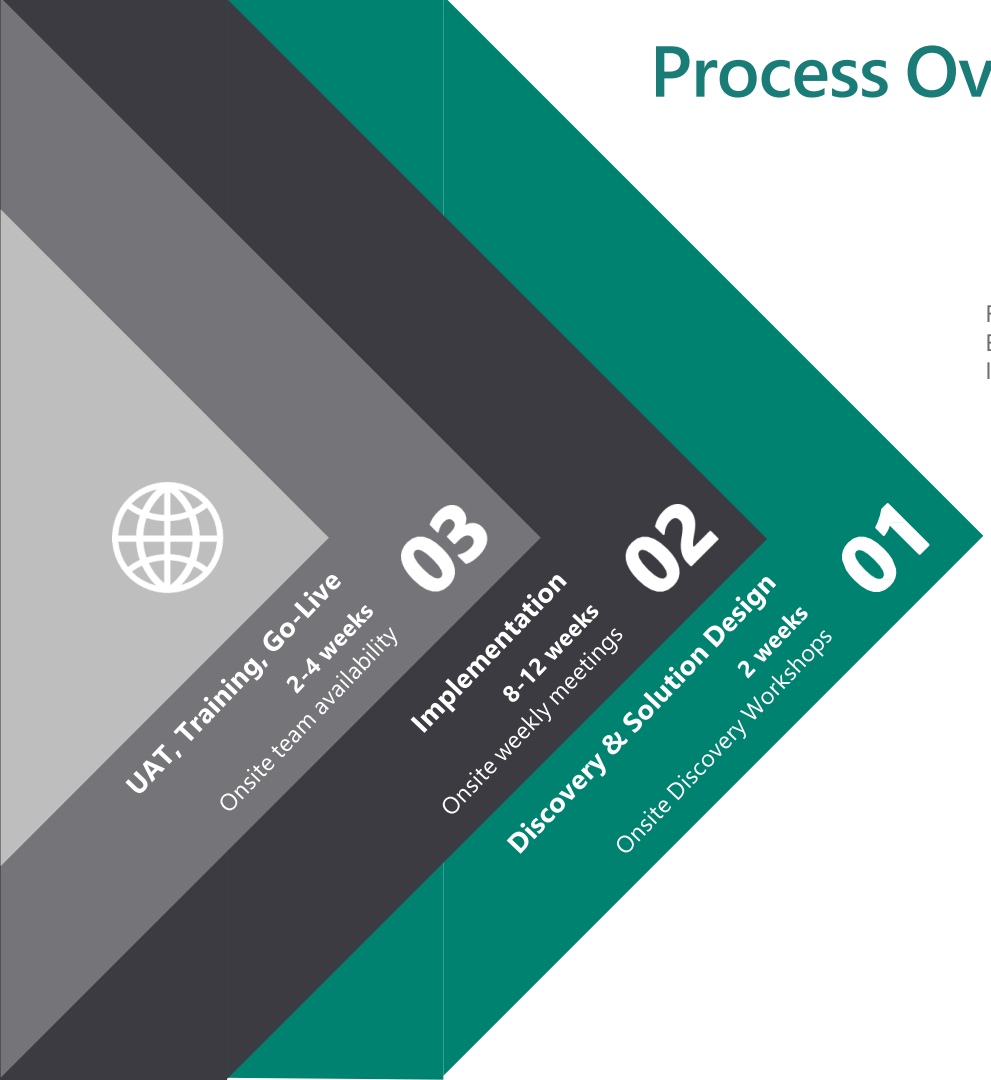
https://docs.microsoft.com/en-us/learn/modules/customize-dynamics-365-business-central/1-cloud?ns-enrollment-type=LearningPath&ns-enrollment-id=learn-dynamics.get-started-dynamics-365-business-central

folio3

Methodology

Development Process, DevOps and Support

Process Overview



From in-depth experience Folio3 has carved out an Optimal Process to ensure ERP repeatable success. Coupled with its experienced and skillful team, ERP Implementations are no more fuzzy but a Success!

Discovery

Identification of problems and pain points currently faced by the existing system. Proposing a solution according to the end requirements to improve efficiency.

Implementation

Implementing the proposed solution with in the proposed timeline with mentioned features and within the budgets.

UAT, Training, Go-Live

User Acceptance Testing, with training sessions for awareness and post implementation support.

Folio3 Rapid Start Template

for Microsoft Dynamics 365 Business Central

Folio3's Rapid Start Methodology is a set of tools and configurations in Microsoft Dynamics 365 that allows users to:

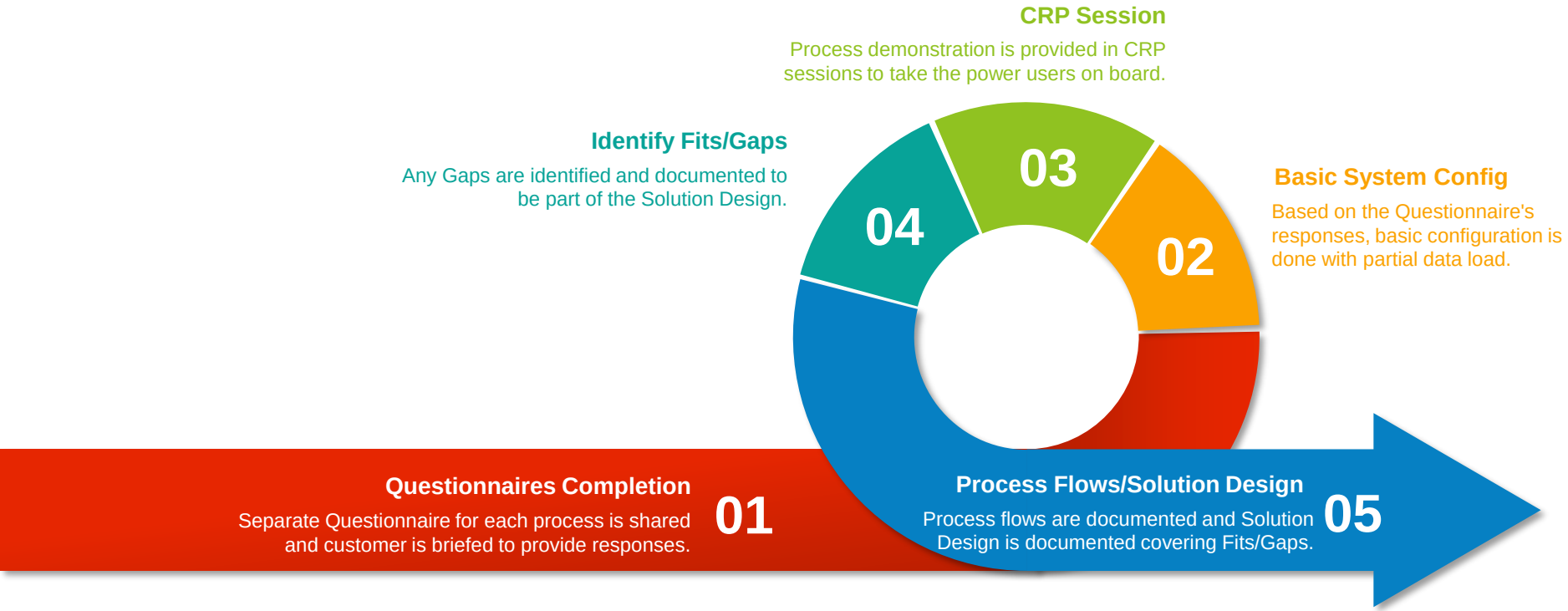
1. **Extract data from a database**
2. **Import data into Microsoft Dynamics 365 Business Central**
3. **Utilize pre-configured templates in the ERP**

The pre-configured templates help you setup the company with a configuration package which helps you setup the following in a very rapid way:

- ❑ General Ledger Setup
- ❑ General Posting Setup
- ❑ Inventory Posting Setup
- ❑ Purchases and Payables Setup
- ❑ Sales and Receivables Setup
- ❑ Warehouse Setup
- ❑ Inventory Setup
- ❑ Service Setup

Microsoft | Dynamics 365

DISCOVERY PROCESS



Support Levels

How do I execute a process of a system?

I need something...

Something doesn't work..

I want to improve..

0

Knowledge Base & Digital Service Desk
Folio3 will setup JIRA Service Desk for the users to report support cases. It comes with a knowledge base which can be populated with FAQs and the responses to other

1

On call Folio3 Local Support Team 16/7 or 24/7
Users who submit tickets to Service Desk or send through email will be responded by Tier 1 Support team.

2

Folio3 Technical Support Team
Tier 1 Support team can engage Folio3 Technical resources for complex issues.

3

Folio3 Product/Solutions Team
Critical issues related to the solutions are escalated to Product/Solutions Team.

Gold
Microsoft Partner

Microsoft

Service Level Agreement – Details

Folio3 proposes to offer the following terms for its Microsoft D365 Support:

Notes	Minor	Major	Critical	Fatal
Priority Description				
Severity	Small degradation. Few or one user affected. Business process can continue.	Limited degradation. Limited number of users or functions affected. Business process can continue.	Significant degradation. Large number of users or critical functions affected. Business process cannot continue.	Complete degradation. All users and critical features of the solution affected. Services completely unavailable.
SLA Conditions				
Response Time	6 hours	4 hours	4 Hours	2 hours
95% must be assigned within	1 day	12 hours	8 hours	3 hours
Workaround	2 weeks	7 days	5 days	3 days

**Support service will be available on a 16 x 7 basis (US Eastern Hours).*

Microsoft | Dynamics 365

folio3 DYNAMICS

Microsoft Licensing Cost

USERS

LICENSE TYPES

SUBSCRIPTION COST

Microsoft Licensing Costs

Microsoft Dynamics 365 Business Central

Business Central is sold and implemented through a global network of Dynamics 365 partners with industry expertise.

Types of User Licenses	Packages	Microsoft Pricing
Essentials - (Full User with all the access)	Dynamics 365 Business Central Essentials	£52.80 Per user/month
Premium (Full User with all the access with addition to Service Order Management and Manufacturing Modules)	Dynamics 365 Business Central Premium	£75.40 Per user/month
Team Member (Users with read-only and data entry rights)	Dynamics 365 Business Central Team Members	£6 Per user/month

No restrictions for minimum number of users

https://dynamics.microsoft.com/en-gb/business-central/pricing/

Gold
Microsoft Partner

Microsoft

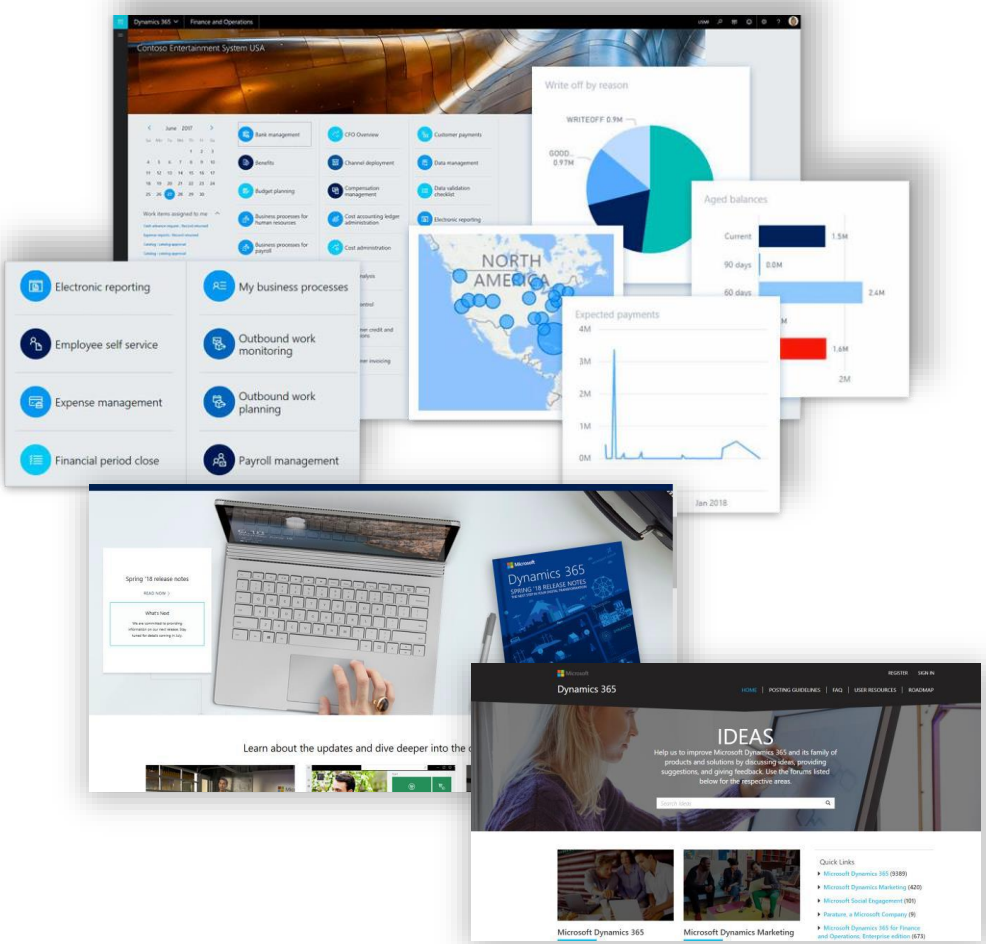
Q/A Session

Question and Answers – Discussion Session

Folio3 Advantages

Next steps

- Requirements
- Initial Discovery Phase
- Business Planning & Estimation Letter
- Proposal/S.O.W
- Sign-off
- Project Initiation



Thank You.

info@folio3.com

www.folio3.com

Pleasanton, California
Chicago, Illinois
Toronto, Canada
Guadalajara, Mexico

Head Office:
1301 Shoreway Road,
Suite 160,
Belmont, CA 94002, USA

Surrey, United Kingdom
Dubai, UAE
Sofia, Bulgaria
Lahore & Karachi, Pakistan