

Agenda



- 1. Introduction
- 2. Objective
- 3. Scope
- 4. Methodology
- 5. Deliverables
- 6. Benefit
- 7. Next steps

Introduction

- This proposal describes a comprehensive system audit of your Dynamics 365 Finance and Supply Chain Management (D365 F&SCM) environment.
- The audit's goal is to evaluate the system's performance, identify potential risks, and recommend enhancements to maximize its functionality and support your business objectives.



Objective

The primary objective of this audit are

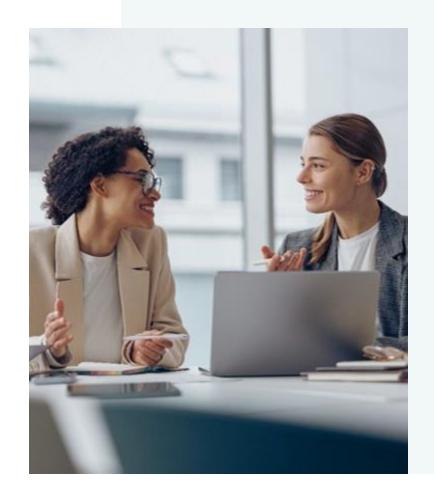
- Evaluate System Configuration: Ensure that the system is optimally configured to meet your business requirements and best practices.
- Assess Data Integrity: Ensure the accuracy, consistency, and completeness of data within the system.
- Analyze Security and Compliance: Identify potential security vulnerabilities and ensure compliance with relevant regulations.
- Review Performance and Stability: Evaluate system performance, identify bottlenecks, and recommend improvements to enhance stability.
- Identify Process Optimization Opportunities: Discover areas where processes can be streamlined and automated within Dynamics 365 Finance & Supply Chain Management System.
- Assess User Adoption and Training: Evaluate user proficiency and identify gaps in training or support.
- Analyze Integration Points: Review the integration of Dynamics 365 Finance & Supply Chain Management with other systems and identify potential issues.
- Assess Customizations and Extensions: Review custom code and extensions for performance, maintainability, and compatibility.
- Provide actionable recommendations: Deliver a detailed report with clear, prioritized recommendations for improvement.



Scope

The audit will encompass the following areas of your Dynamics 365 Finance & Supply Chain Management environment

- Financial management: General Ledger, Accounts Payable, Accounts Receivable, Fixed Assets, Budgeting, and Reporting.
- **Supply chain management**: Inventory Management, Procurement, Sales, Warehouse Management, and Manufacturing.
- System administration and security: User roles, permissions, data security, and compliance.
- Data management: Data integrity, data migration, and data archiving.
- Integration: Integration with other systems (e.g., CRM, e-commerce, third-party logistics).
- Customizations and extensions: Review of all custom code and configurations.
- Performance and stability: System performance, response times, and error logs.
- User adoption: User proficiency and training effectiveness.
- Reporting and business intelligence: Analysis of system reports & data for decision making.



Methodology

Our audit methodology will include

Document review

Reviewing system documentation, process flows, and configuration manuals.

System analysis

Examining system settings, configurations, and data.

Data analysis

Analyzing data for accuracy, consistency, and completeness.

User interviews

Conducting interviews with key users to gather feedback and insights.

Performance monitoring

Monitoring system performance and identifying bottlenecks.

Security assessment

Reviewing security settings & access controls.

Code review

Reviewing custom code and extensions for quality & performance.

Reporting

Preparing a detailed audit report with findings and recommendations.



Deliverables:

Audit plan

A detailed plan outlining scope, methodology, & timeline of the audit.

Audit report

A comprehensive report summarizing the audit findings, including:

- Executive summary.
- Detailed findings and observations.
- · Risk assessment.
- Prioritized recommendations for improvement.
- Actionable steps for implementation.

Presentation of findings

A presentation to key stakeholders to discuss the audit findings and recommendations.





Benefits

Independent and expert assessment

- Objective Evaluation: We conducts an unbiased and independent evaluation of the Dynamics 365 Finance & Operations system, identifying areas of strength and weakness without internal bias.
- Expert Knowledge: Clients benefited with extensive knowledge and experience with Dynamics 365
 Finance & Operations best practices, industry standards, and potential pitfalls.
- Fresh Perspective: We can provide a fresh perspective on the client's system and processes, identifying issues that internal teams may overlook.

Identification of issues and risks

- Problem Detection: Audits can identify existing issues, errors, and inefficiencies in the system before they escalate and cause significant disruptions.
- Risk Mitigation: The SI can identify potential risks to compliance, security, performance, and data integrity, allowing the client to take proactive steps.
- Highlighting control Weakness: Audits can identify weaknesses in internal controls that may lead to fraud, errors, or noncompliance.

Enhanced data accuracy and integrity

- Data Quality Assessment: Audits can assess the accuracy, completeness, and consistency of data within the Dynamics 365 Finance & Operations system
- Reduced Errors in Reporting: Improved data accuracy leads to more reliable financial and operational reports for decision-making.

Roadmap for future improvements

- Actionable Recommendations: The SI generates a clear report that includes prioritized recommendations for addressing identified issues and improving the system.
- Strategic Guidance: The audit can reveal valuable information for future system upgrades, enhancements, and strategic planning.
- Justification for Investment: The audit report can be used to present a business case for investing in necessary system improvements.



Next steps

To proceed with this proposal, please:

- Review and approve this proposal.
- Schedule a kickoff meeting to discuss the project in detail.
- Provide access to the necessary system environments and documentation.

We are confident that our system audit will provide valuable insights into your Dynamics 365 Finance & Operations and Supply Chain environment and help you optimize its performance and support your business goals. We look forward to partnering with you on this important initiative.



Thank you