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# Microsoft Dynamics 365

Finance & Supply Chain  
Management- Audit Offerings

2025



# Agenda



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# 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.

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# 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.

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# Methodology

Our audit methodology will include

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## 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

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

## Audit report

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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

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



# Benefits

## Independent and expert assessment

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- **Objective Evaluation:** We conduct 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

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- **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

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- **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

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- **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.



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Thank you