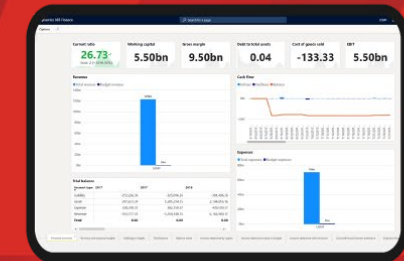
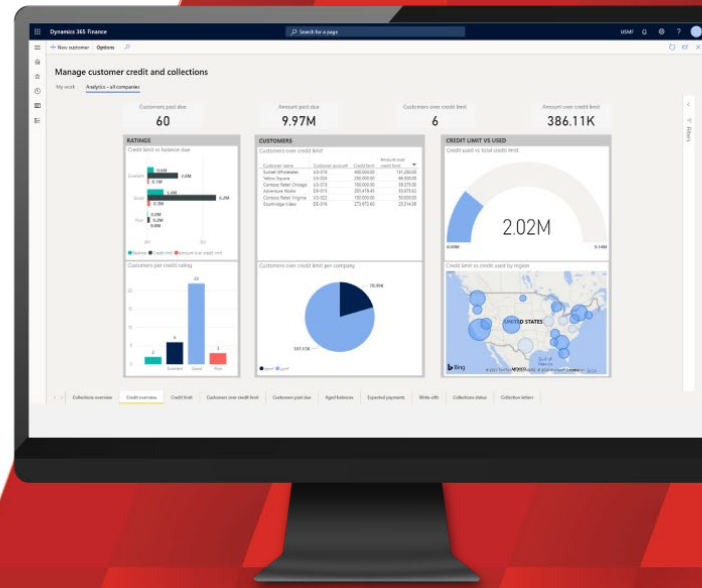


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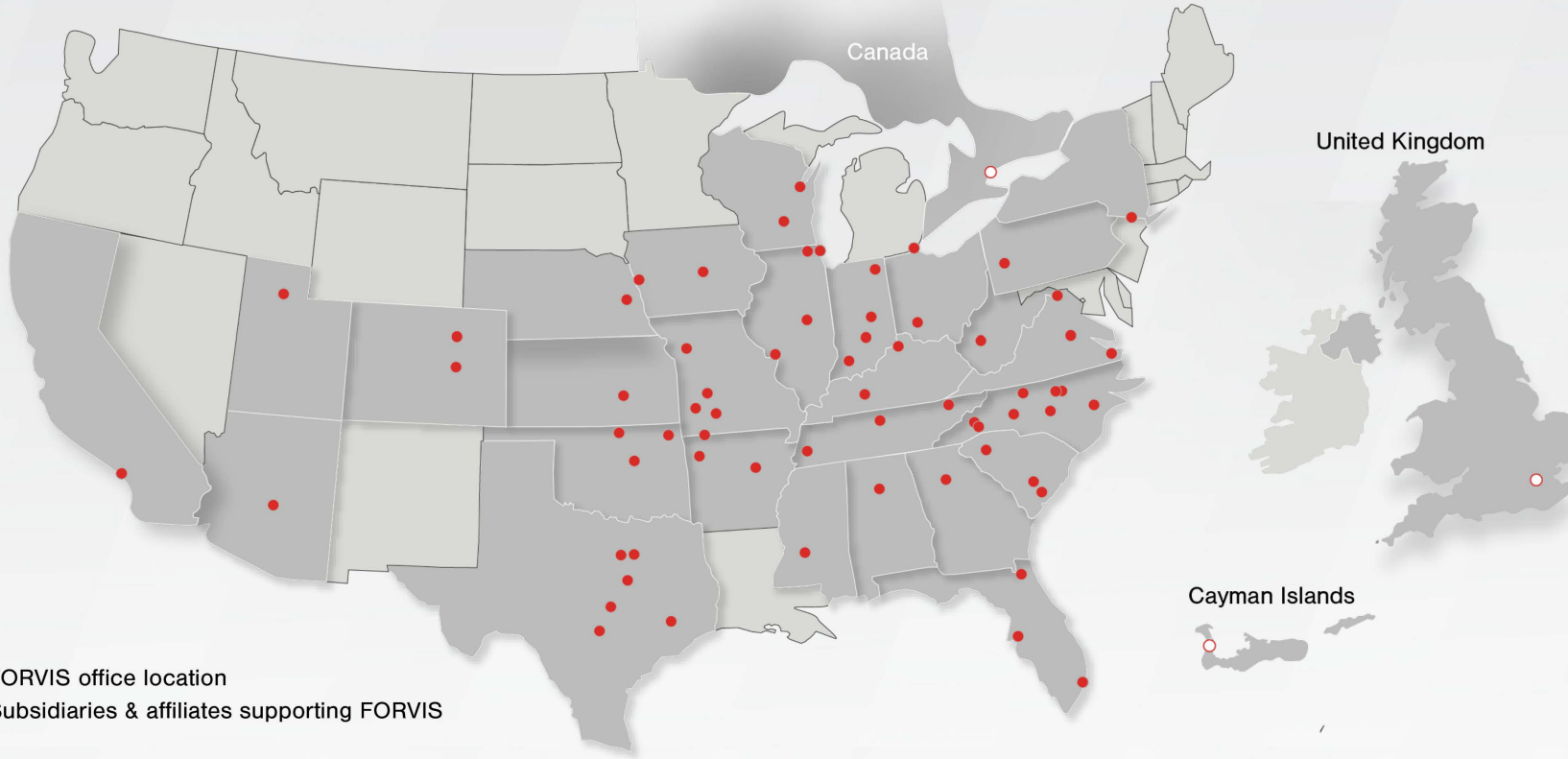


Business Technology Solutions

Upgrading Your ERP: Dynamics AX to Dynamics 365 Finance

March 12, 2024

Global Presence & Reach



- FORVIS office location
- Subsidiaries & affiliates supporting FORVIS

Subsidiaries & Affiliates Supporting FORVIS

- FORVIS Capital Advisors, LLC
- FORVIS Global Advisory Canada ULC**
- TALENT SHIFT, LLC
- FORVIS Wealth Advisors, LLC
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By the Numbers

Top 10
U.S. Public Accounting Firm *

27
States + Canada, U.K., & **
Cayman Islands

10+
Industries

68
Markets

500+
Partners & Principals

6,000+
Team Members



FORVIS is a member of Praxity™, an international alliance of independent accounting firms that offers multinational clients access to resources around the world.

Business Technology Solutions

FORVIS provides enterprise resource planning (ERP) & customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, & support services.

In addition, our Insights & Automation practice provides business intelligence (BI) & robotic process automation (RPA) services. Our Marketing Consulting practice provides B2B & B2C marketing automation consulting services.

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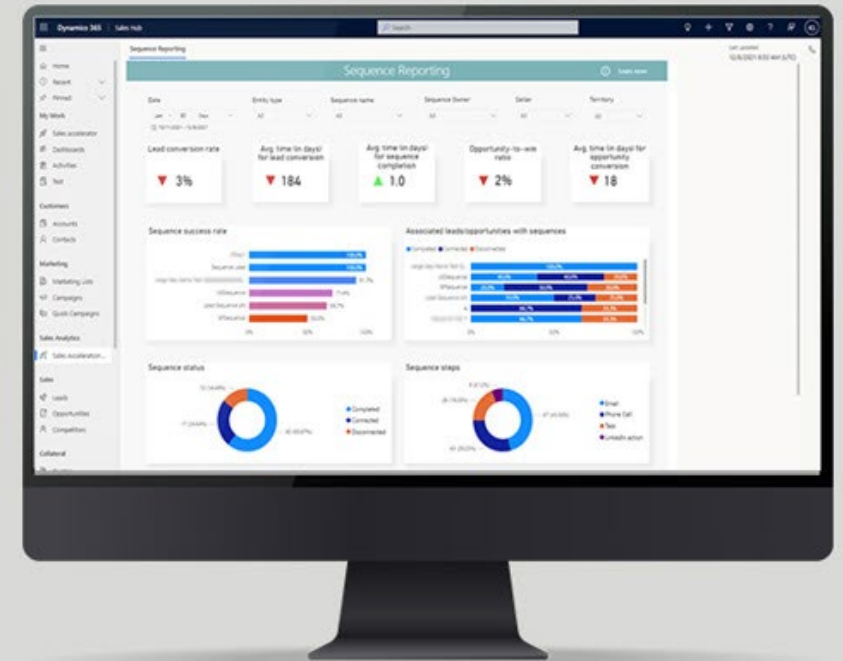
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From sales forecasting to financial reporting,
learn what CRM and ERP technologies can do.

Meet the Presenters



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Senior Managing Consultant – Technical Team Lead

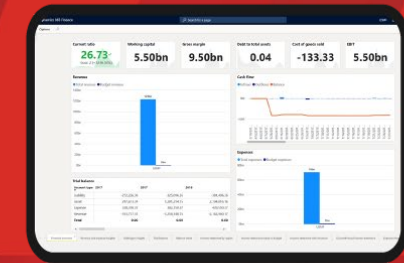
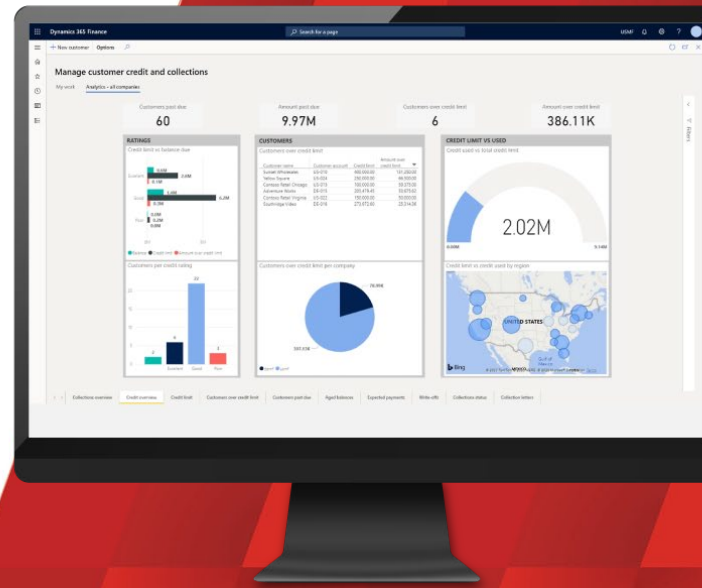
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Microsoft
Partner

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Business Technology Solutions

Upgrading Your ERP: Dynamics AX to Dynamics 365 Finance

March 12, 2024

Agenda

2 p.m. ET

● Introductions

2:05 ● Summary

2:10 ● What Is Dynamics 365?

2:20 ● Why Upgrade From AX?

2:30 ● Upgrade Process

2:50 ● Closing

Learning Objectives

- Explain the **reasons for upgrading** from AX to Dynamics 365 Finance & Supply Chain Management
- Describe the **new features & functionality available** in Dynamics 365 Finance & Supply Chain Management to enhance capabilities
- Discuss the **step-by-step process** for transitioning data & configurations from AX to Dynamics 365 Finance & Supply Chain Management
- **Identify strategies** for integrating enhanced business intelligence & insights into business operations after upgrading platforms



Upgrading from Microsoft Dynamics AX to Microsoft Dynamics 365 Finance & Supply Chain Management is an exciting move for businesses using AX today. While not a simple process, upgrading provides an **opportunity** to leverage new features & functionality for improved business agility.

In this interactive webinar, we'll outline the **key steps for upgrading** & highlight the many benefits you can realize with Dynamics 365 Finance & Supply Chain Management.



What Is Dynamics 365?

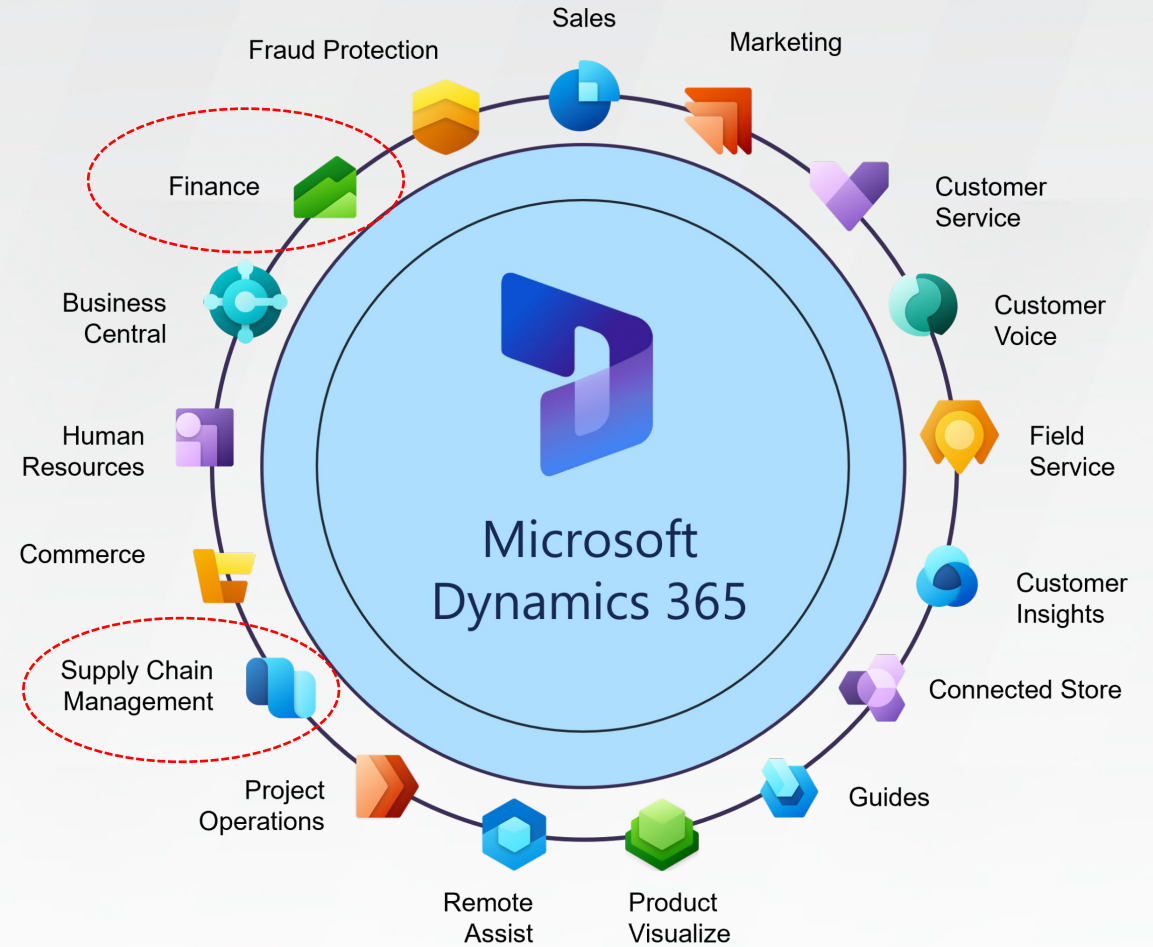
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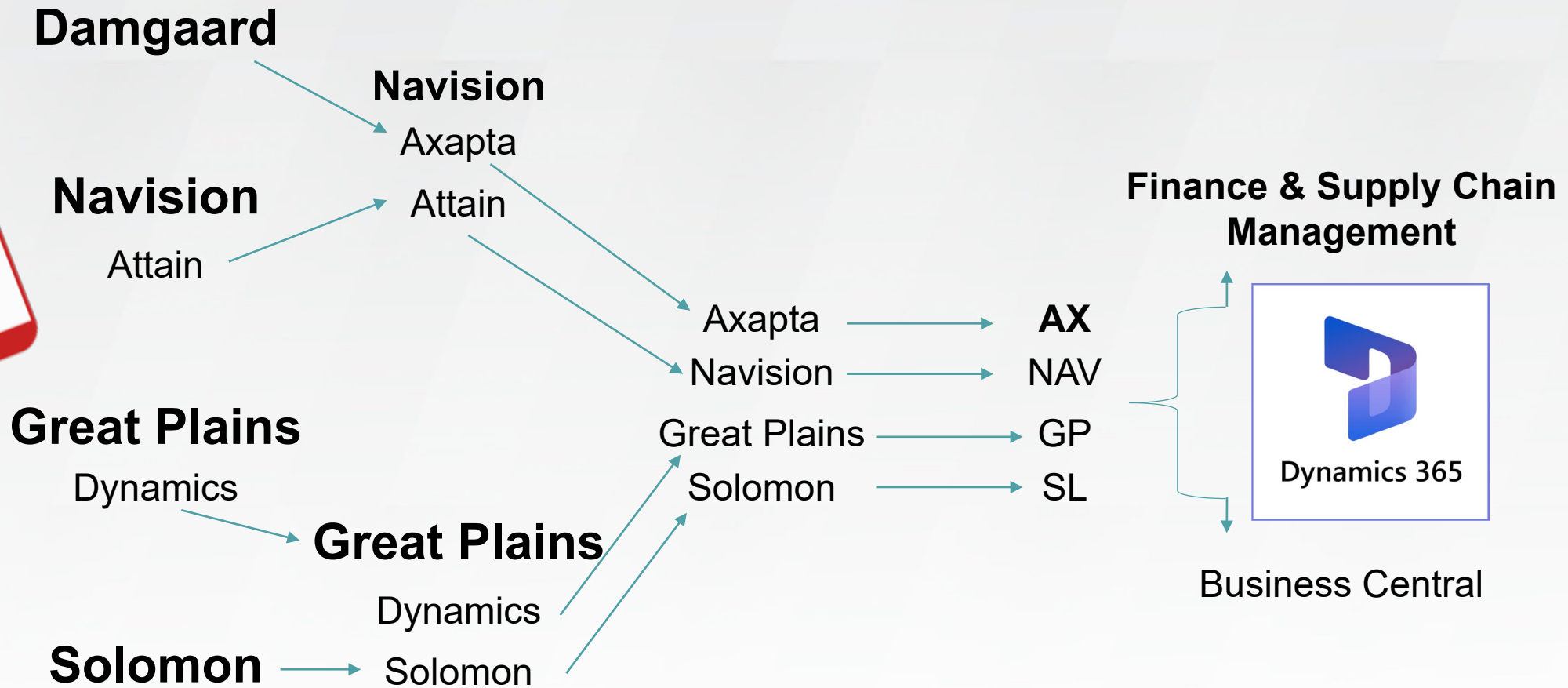
What Is Dynamics 365?

Microsoft Dynamics 365 consists of many cloud-based intelligent business applications, including ERP & CRM applications in one portfolio.

This means your teams, business processes, & systems can be integrated & work seamlessly together so you can gain visibility throughout your organization to help drive growth.



A Walk Down Memory Lane ...



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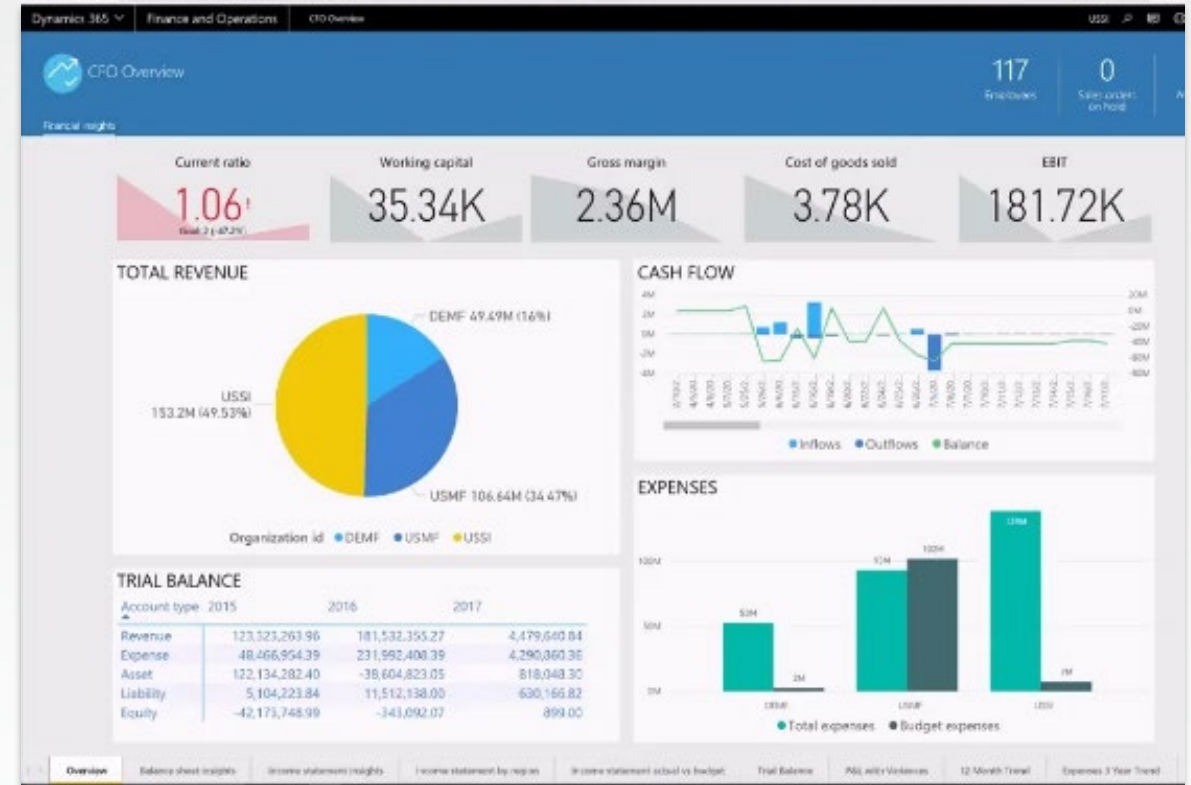
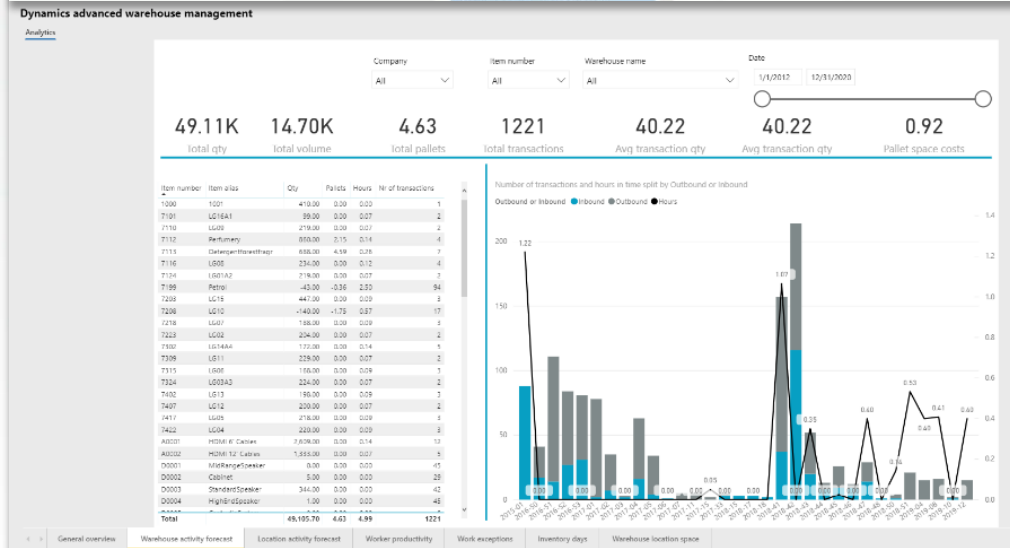
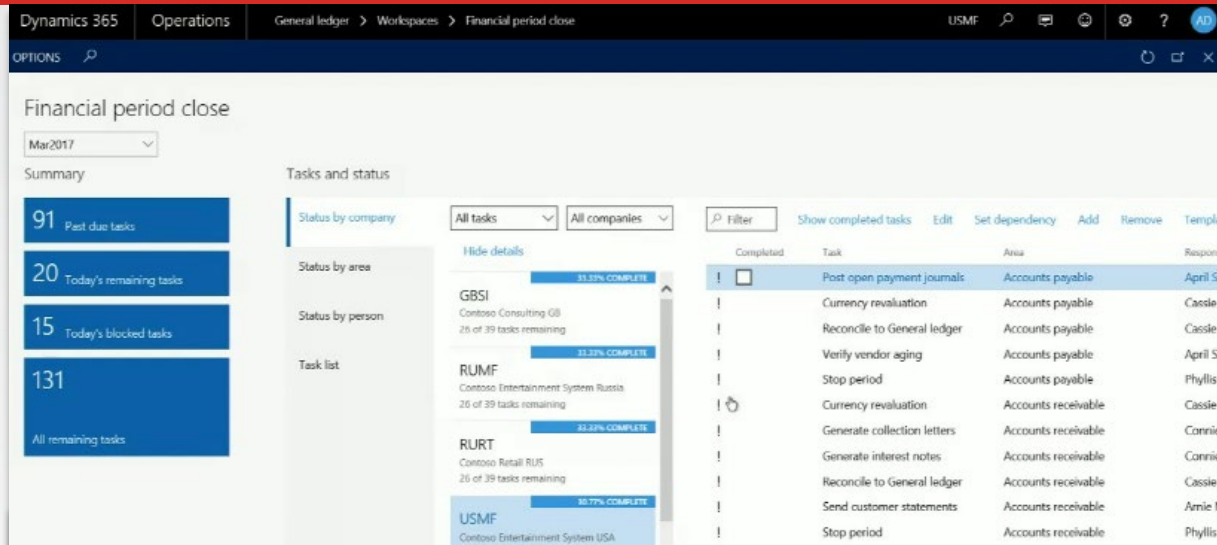
Dynamics 365 – Finance & Supply Chain

- Dynamics 365 Finance & Supply Chain Management (F&SCM) is Microsoft's ERP solution for midsize & large organizations. It's primarily known for meeting the complex needs of production & distribution companies that operate globally
- F&SCM has a long history behind it, dating back to 1998, when the solution, then called Axapta, was launched under a collaboration between Damgaard Data & IBM.
- In 2017, changed the name to Dynamics 365 for Finance & Operations (which was a widely used name)
- In 2020, Finance was split into two applications:
 - Dynamics 365 Finance
 - Dynamics 365 Supply Chain Management
- Note that Microsoft lets you host these ERP systems on-premises or in the cloud. In addition, F&SCM can be natively integrated with other Microsoft solutions, such as CRM, sales, service, & marketing applications



Core F&SCM Capabilities

Analytical Dashboards – Workspaces



Cloud-First Architecture



F&SCM

Tools

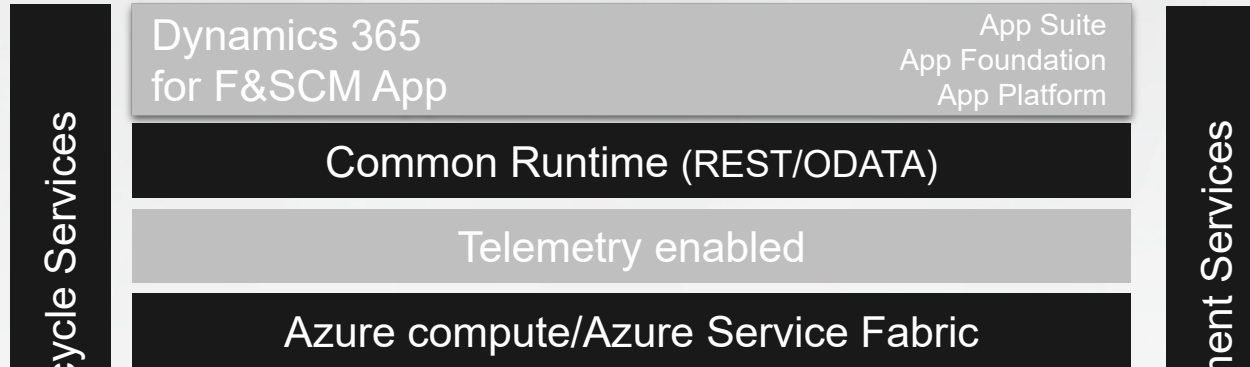
Visual Studio IDE

Client



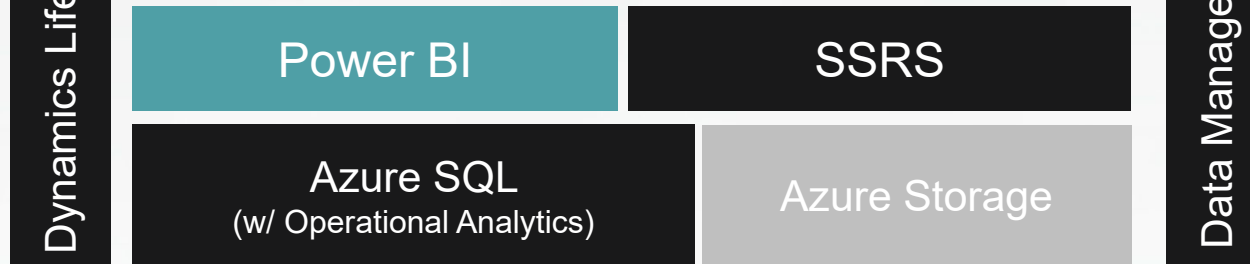
- Immersive Web Experience
- Cross-browser support
- No plugins means quick & easy access across a range of devices

Application



- Zero downtime scale out model based on usage
- Highly available – Update & Fault Domains
- Business logic & UI Determination
- In-memory processing
- Isolated platform, application, & extension model – enables better servicing, update strategies

Data



- Highly available – Scale up model
- High bandwidth low latency-based storage
- Isolated file system, transaction process, analytical, & integration DBs enable enhanced response & throughput capabilities

Identity

Entra AD

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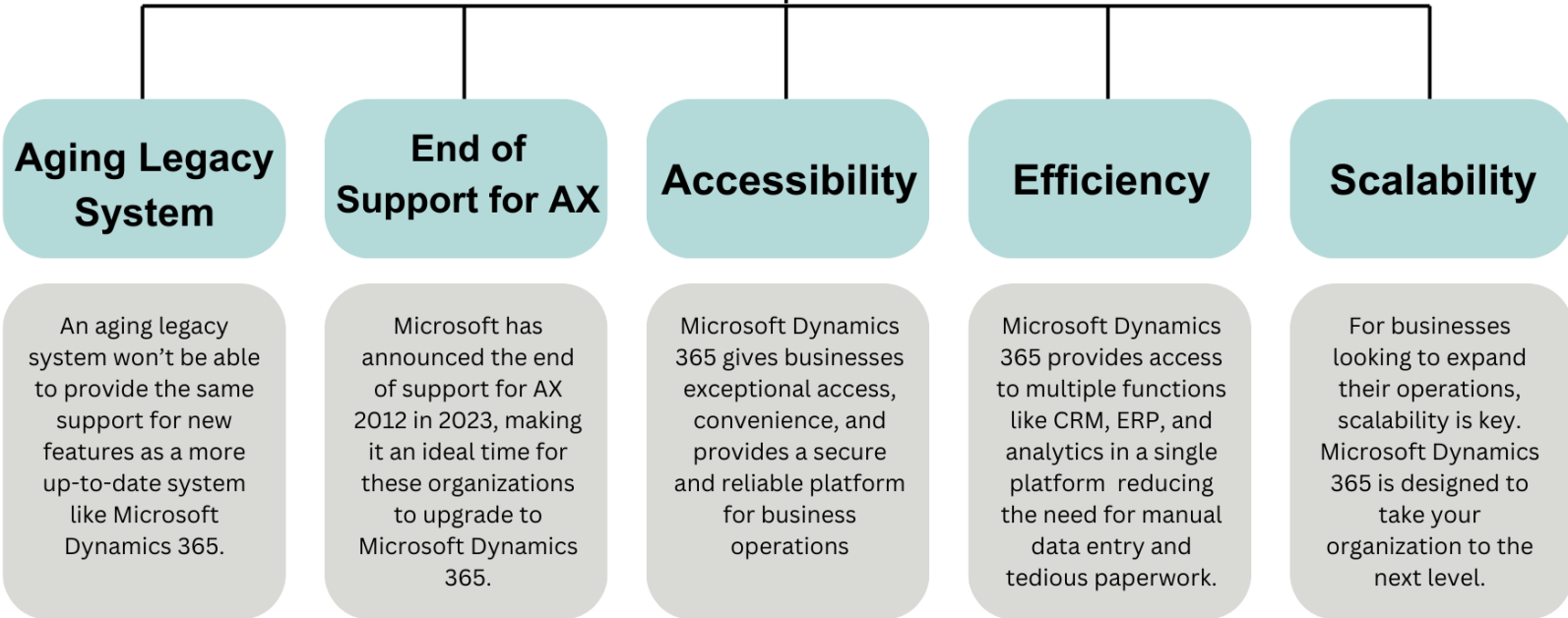


Why Upgrade?

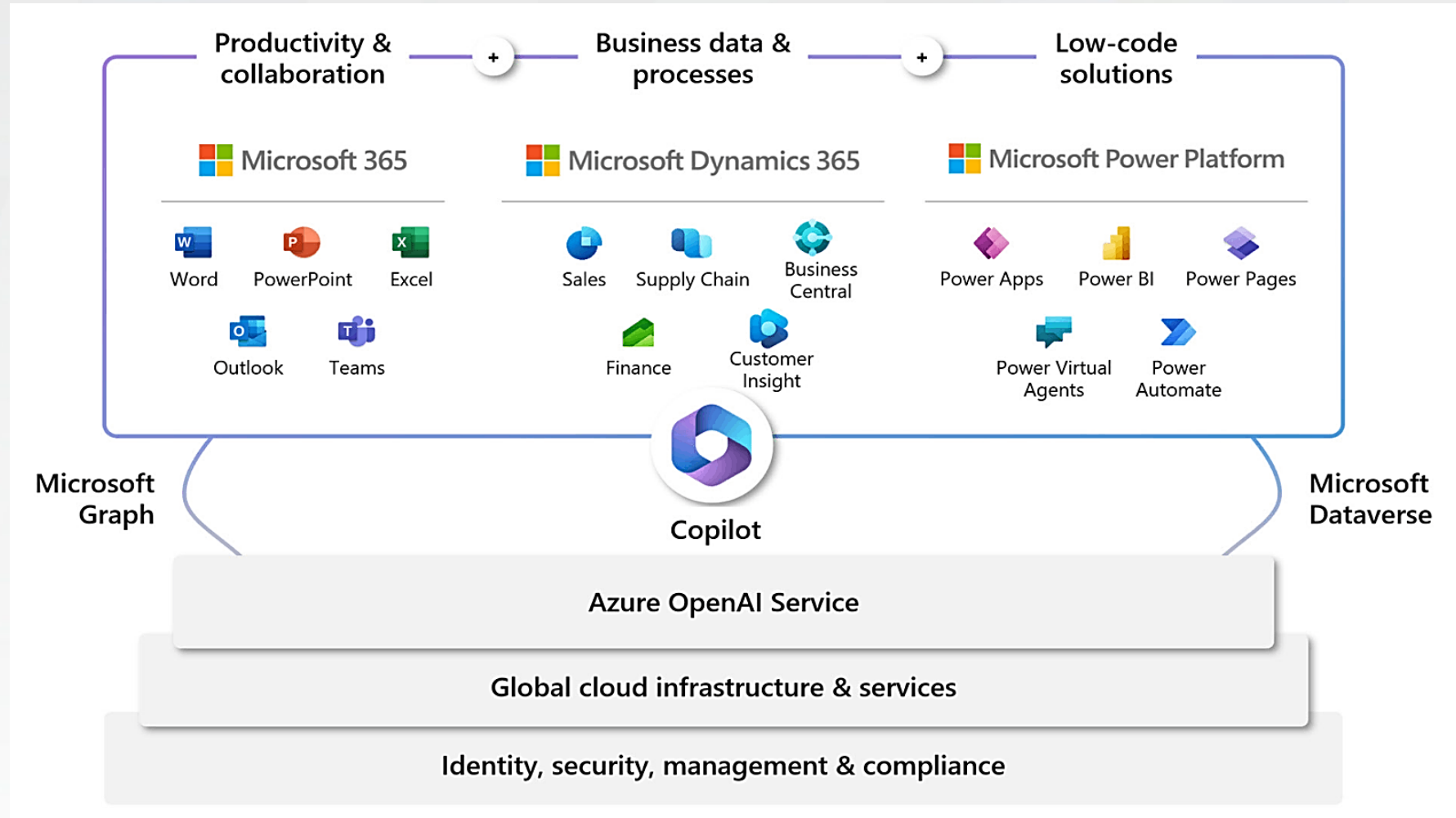
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Reasons to move to Microsoft Dynamics 365

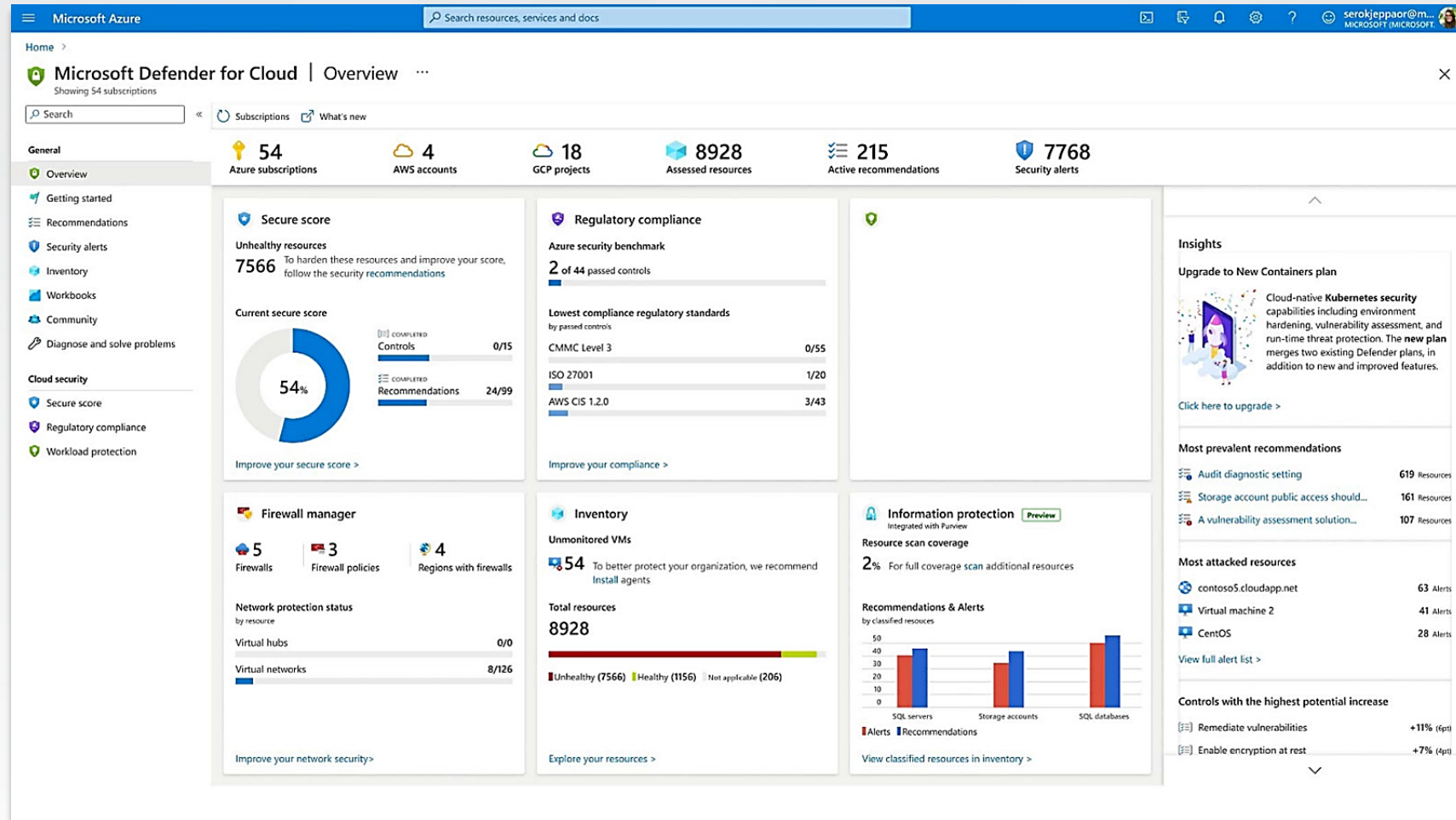


Unified Data



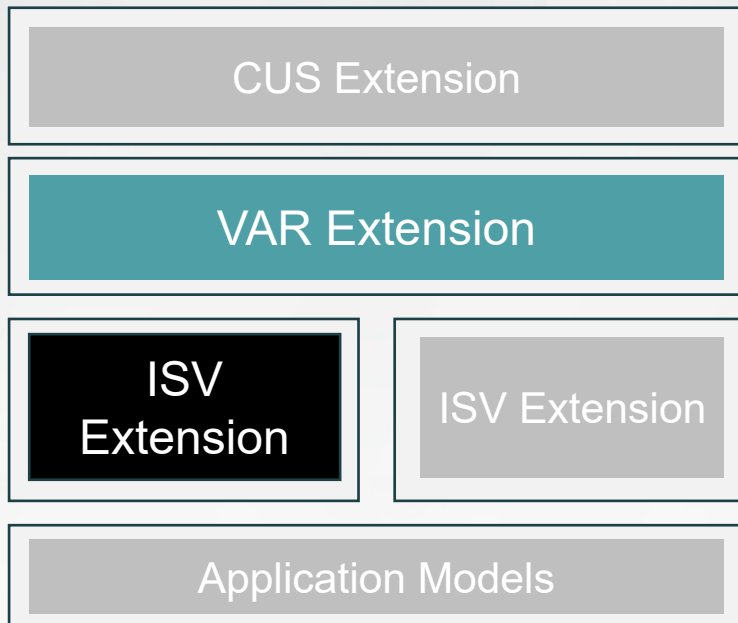
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Improved Security

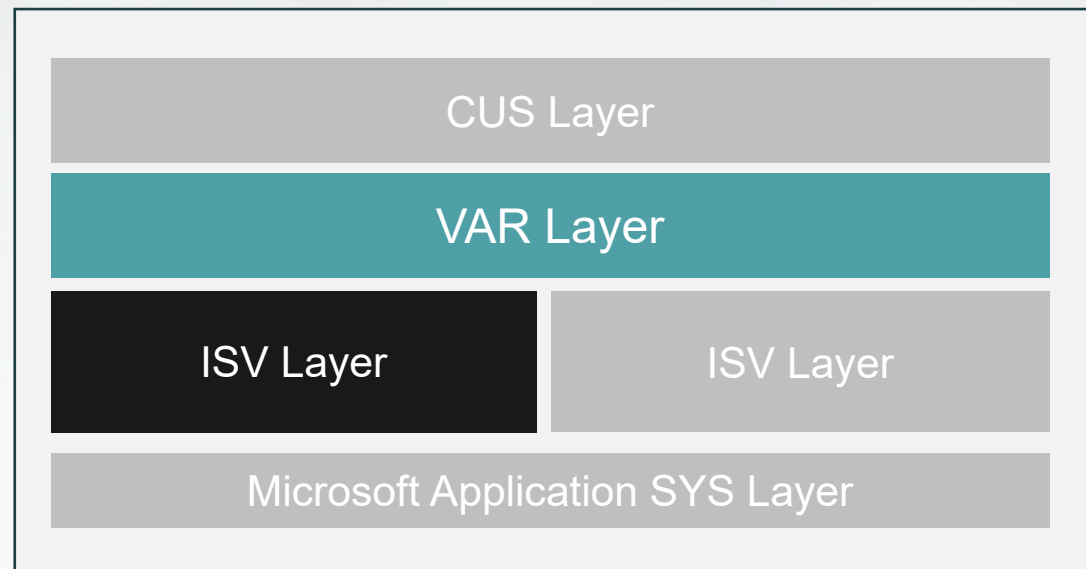


Extension vs. Overlay

Extensions Separate Packages



Over Layering Single Package

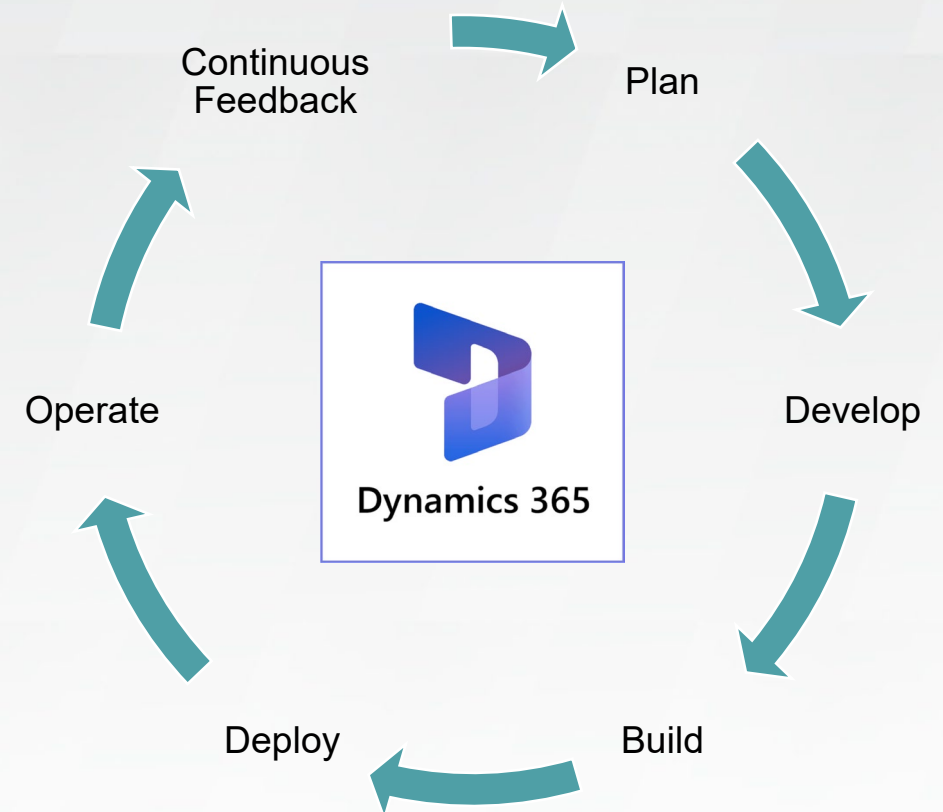


Comparison

Dynamics 365	Cloud based & hybrid	Op-ex flexible (pay as you go)	Browser based	Mobile & Tablets	CRM, Power BI, O365, Cortana	Computing, licensing costs, and routine maintenance are included with your subscription	Modern upgrade cycle simplifies integration, meaning there's less downtime and overhead costs	Base code remains unchanged, reducing the risk of compatibility issues	The software is hosted in Azure and besides the initial deployment, the process is mostly automated	Automatic	Global Scalability	Power Apps, Flow	Visual Studio [X+ + XML]
	Infra-structure	License	User Interface	Compatibility	Integration	Price	Updates	System Customization	Deployment	Updates	Scalability	Add Ons	Development
Dynamics AX	Physical on-premise servers	Capital Expense Yearly	Software-based	Minimum (non-existent)	Office, CRM	You'll pay for a license, physical servers, hosting, cybersecurity, etc.	These are done manually, making them extremely error prone	An overlaying method is used, meaning new code is stacked on top of existing code	Individual machines are used to install and configure software, which is both time consuming and costly	Manual	Mid to Large Enterprises	None	MorphX

One Version

- Predictable updates with continuous deployment
- Early visibility of upcoming changes
- Ability to test new capabilities ahead of time
- Opportunities to advance your knowledge
- Improved Dynamics 365 experience



New Features When You Upgrade


Mobile Timesheet	RFQ	Product Catalogs	Global Address Book	Workspaces
Electronic Reporting	Trade Allowance Management	NEW FEATURE	Transportation Management	Collections Management
Subscription Billing	Price Management	Asset Management	Landed Cost	Supply Chain Insights
Data Management	Cost Management	Engineering Change Management	Business Performance Analytics	Positive Pay

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This list is not exhaustive.



- Is it a re-implementation or an upgrade?
- Utilize as much as possible but be attentive of the “lift & shift” mindset
- Recommend using the implementation as a time to assess improvements & transformation



Upgrade Process

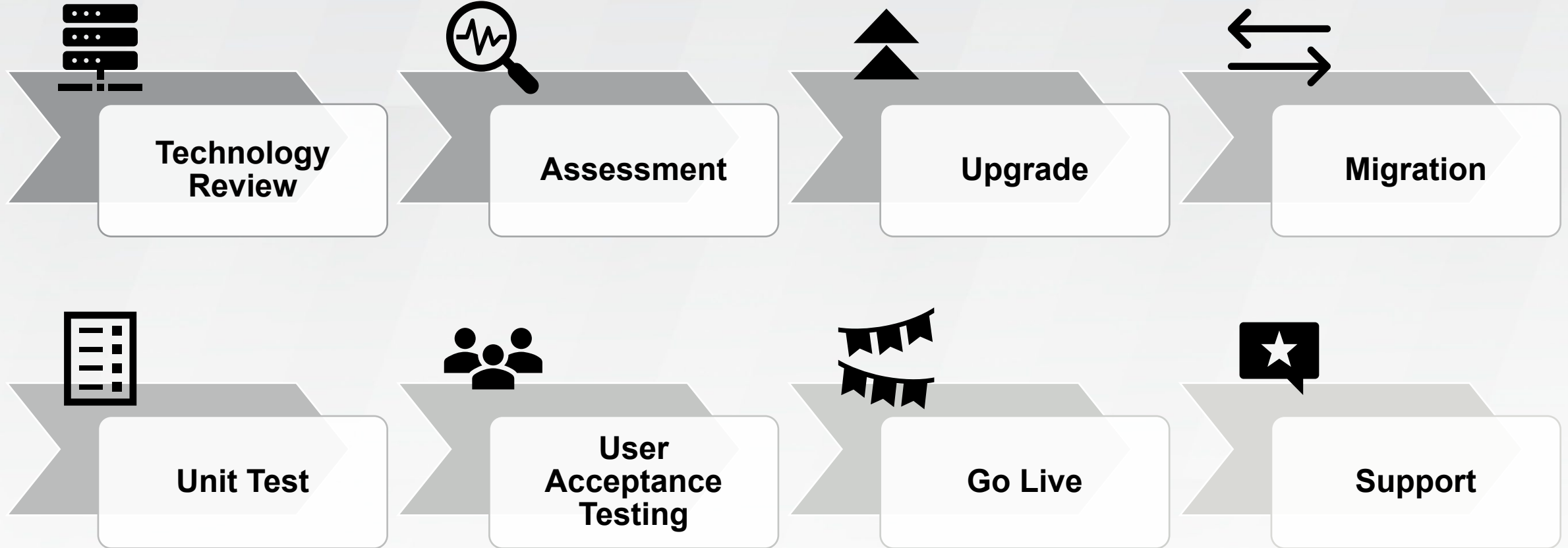
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Upgrade Process



F&SCM

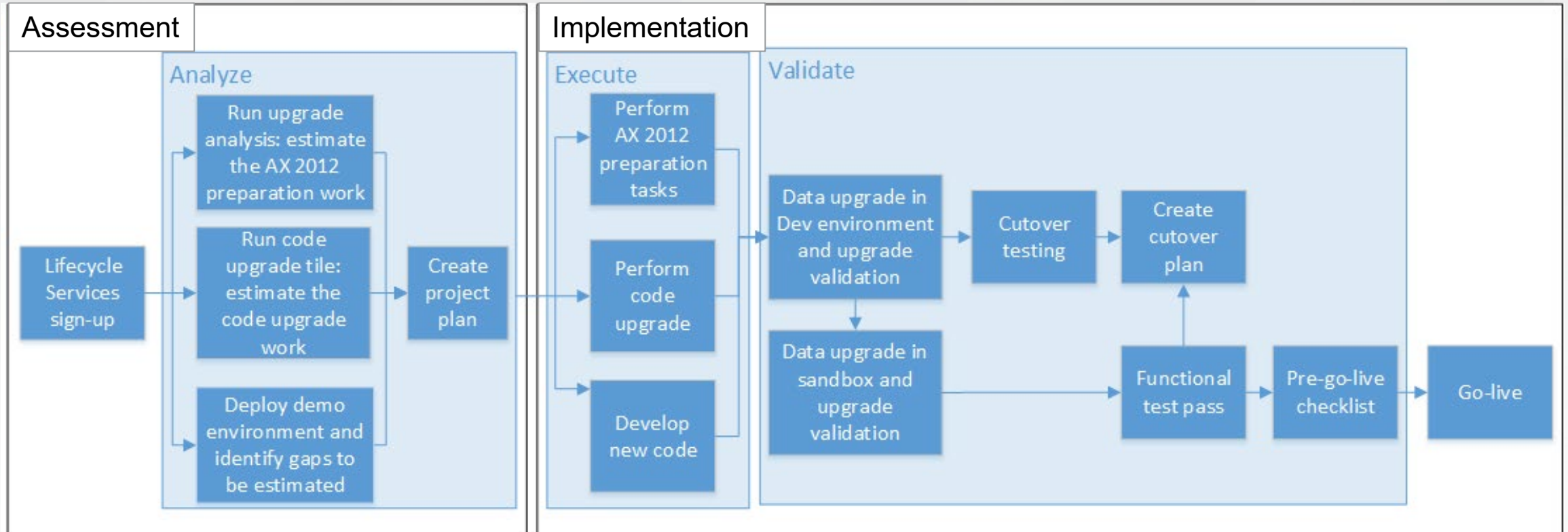


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Upgrade Details

- What is the upgrade?
 - Tools to help bring forward existing customizations
 - Data upgrade process that you can use to bring your database forward
- Deprecated features cannot be upgraded
- Only supported from Dynamics AX 2012 R2 or R3 (can migrate from 2009 to 2012 but that is a significant effort)

Upgrade Overview



FORVIS Recommendations

- Review customizations before bringing them into Dynamics 365—be purposeful
- Consolidate code into one layer & model
- Clean up database prior to migrating
 - Staging tables
 - Temp tables
- Consider archiving to data warehouse



Upgrade Costs

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What to Consider

Finance and accounting
productivity improvements
Up to 55%



The Total Economic Impact™ Of Microsoft Dynamics 365 Finance



ROI
122%



BENEFITS PV
\$6.22M



NPV
\$3.41M



PAYBACK
9 months



Hardware Costs (Server,
Network, Power)



AX Maintenance



Consolidation of Licenses



Administration Time



Implementation Services



Azure Spend



Time (Resources)

Savings

Costs

Bridge to Cloud Promotion – 40% License Discount

Business Technology Solutions – Services



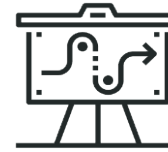
Digital Transformation Strategy

Technology Vision & Execution

- Current/Future State Business & IT Review
- Solution Assessment, Selection, & Licensing
- Execution Planning

Existing Solution Analysis & Recommendations

- Project Rescues
- Migrations/Upgrades
- Optimization/User Adoption



Digital Transformation Execution

Solution Execution

- Business Process Optimization
- Platform Selection
- Design, Build, & Support
- Supply Chain Optimization
- Sales & Marketing Optimization
- System Integrations
- Upgrades & Migrations
- Business Intelligence & Analytics

Project Management

- Project Monitoring & Controlling
- Project Audit & Stabilization

Organizational Change Management

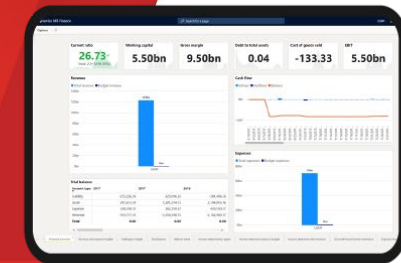
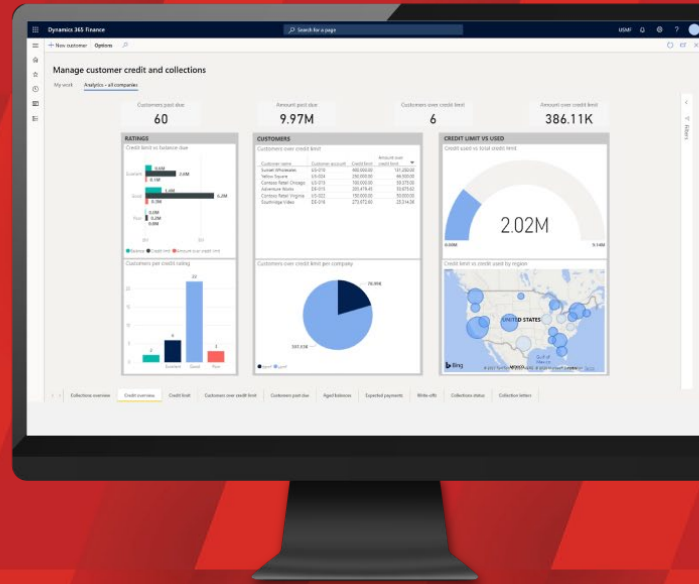
- Transition Readiness
- Change Management
- End User & Administrator Training
- Post-Implementation Support

Questions?

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Thank you!



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