Microsoft Partner

Microsoft

Gold Enterprise Resource Planning
Gold Small and Midmarket Cloud Solutions
Gold Cloud Platform
Gold Application Integration
Gold Application Development

# Accelerate your upgrade of AX to Dynamics 365 and Operations with Korcomptenz

Korcomptenz

# Our Specializations

Tailored data migration strategy to ensure that historical data can be queried reported and audited.

Save 40% on upgrade, migration, and integration costs with our unique methodology

Leverage our omnichannel expertise powered by intelligent order management and advanced warehouse management

Get better reporting with built-in Power BI capabilities

Elevate your systems for better financial performance and connected operations

Improve supply chain performance by identifying and implementing supply chain optimization solutions

Gain customer 360 and customer insights by integrating Dynamics 365 F&O with any CRM

Enhanced security and minimize mistakes through seamless payment integration with major banks

Integrate with Microsoft's AI/ML engine to get better forecasts.

# Benefits of software upgrades by Microsoft, embracing emerging technologies

- Software upgrades by Microsoft introducing new features, embracing emerging technologies etc.
- Ability to use RPA with power automate
- Greater accessibility: D365 F&O is a cloud-based solution that provides greater flexibility, scalability, and accessibility.
- Cost reduction: D365 F&O reduces the cost of system ownership and licensing.
- More functionalities: Enhanced financial analytics and financial control, Improved supply chain features, rich and immersive analytics
- Improved flexibility: D365 F&O allows scaling services as and when needed.
- Built-in Power BI dashboards for Supplier performance, Inventory and warehouse operations, Cash flow, Financial analysis
- Increased security: D365 F&O secures critical data with improved security and privacy.
- Direct integration to Microsoft Excel for quick data entry and ad-hoc reporting: D365 F&O provides comprehensive tools for budgeting, forecasting, and financial planning. The system automates financial processes, reducing the chances of errors and ensuring compliance with financial regulations.

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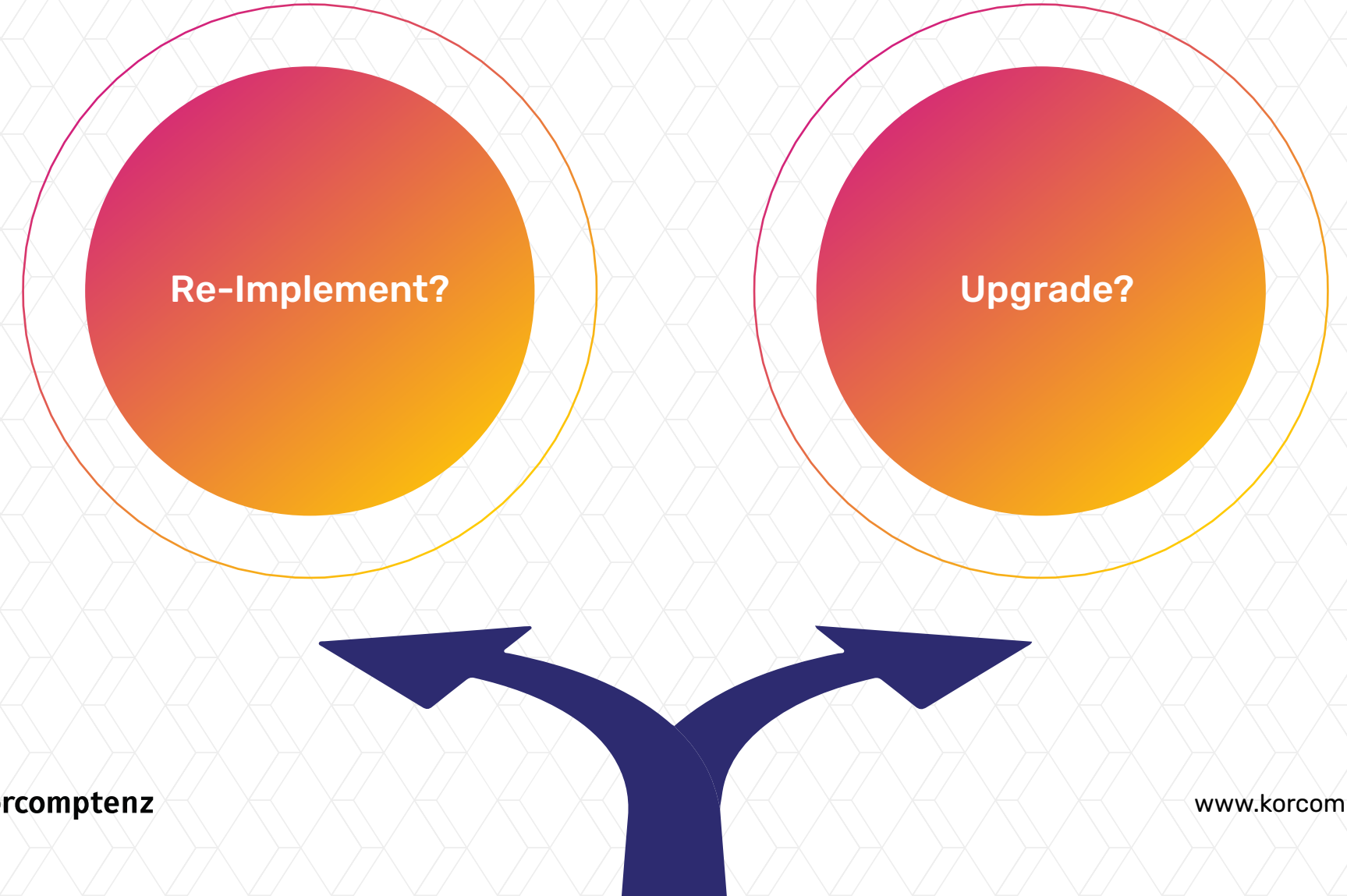
# What are your options? And how do you choose?



# Option 1 - **Upgrade**

# What is the upgrade process?

Based on the version you are on currently the upgrade process is given below:

AX 2009

**Upgrade from Dynamics AX 2009 to Dynamics 365 Finance and Operations**

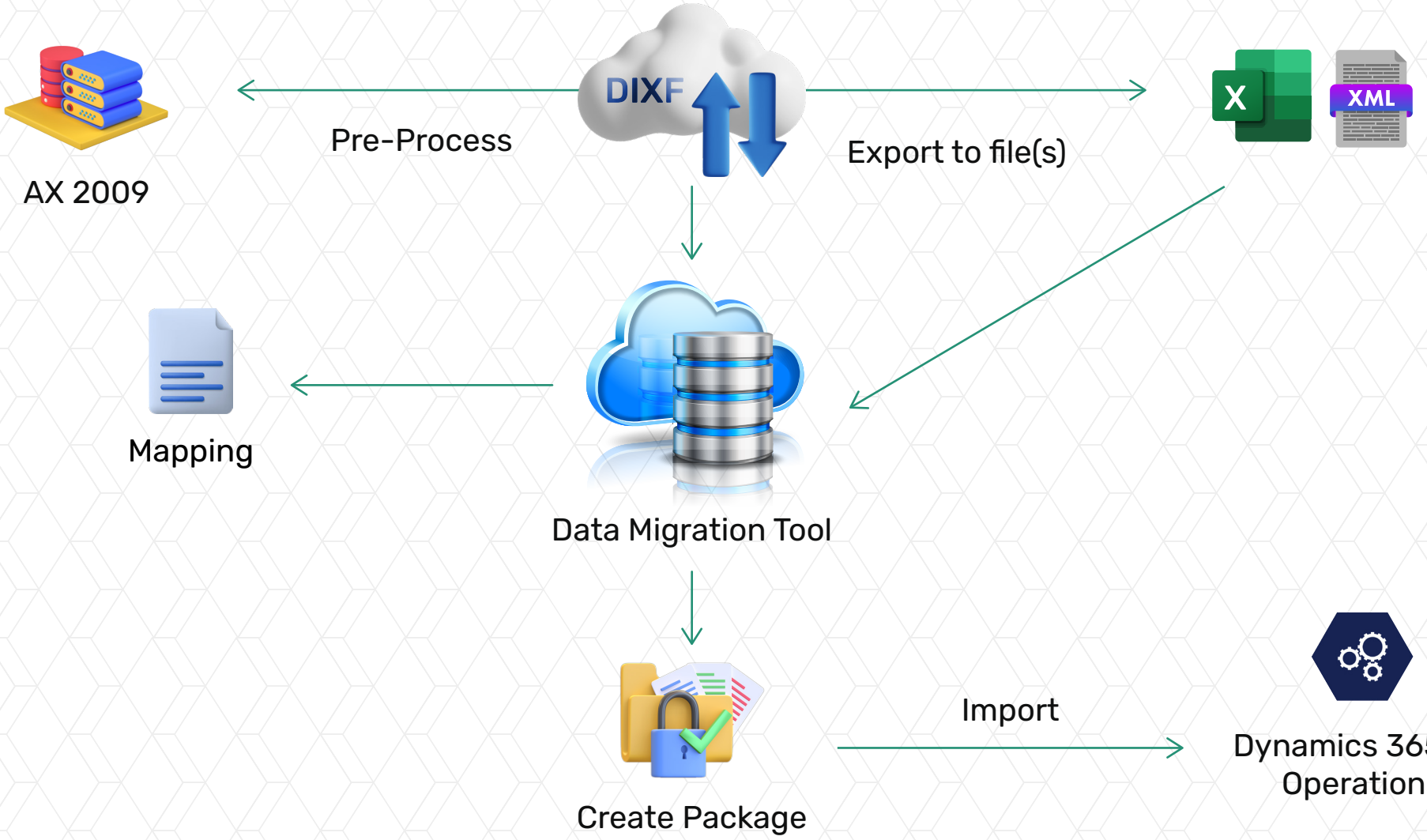
Data migration tool (DMT) is the only supported upgrade path from AX 2009 to Finance and Operations.

AX 2012

**Upgrade from Dynamics AX 2012 to Dynamics 365 Finance and Operations**

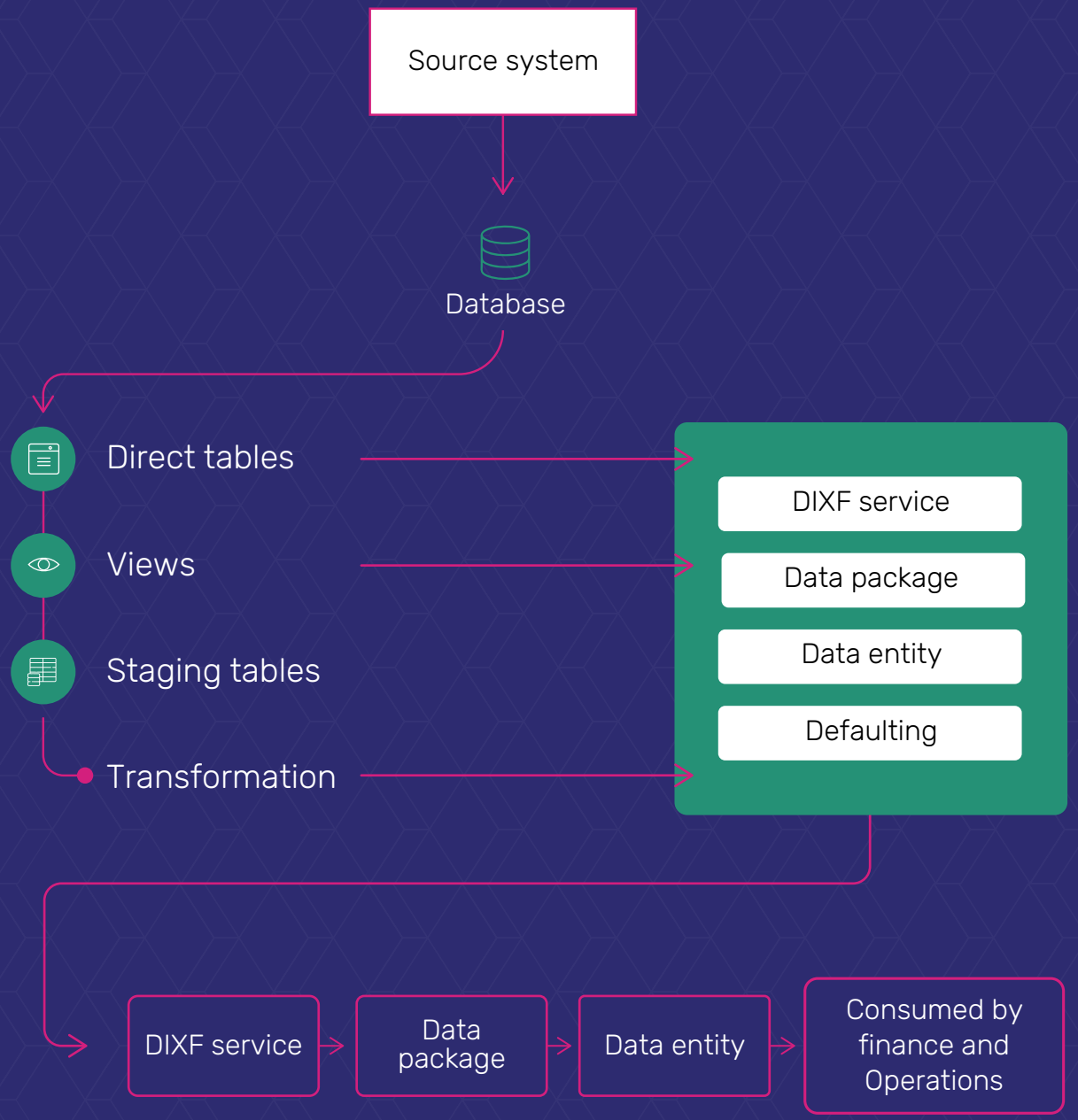
- Bring forward existing custom application code from AX 2012.
- Bring forward your database with a data upgrade process.
- Upgrade licensing code, and data

# High-level process for Dynamics AX 2009



# Technical Upgrade Process for Dynamics AX 2009

- AX 2009 to D365
- Technical Process flow

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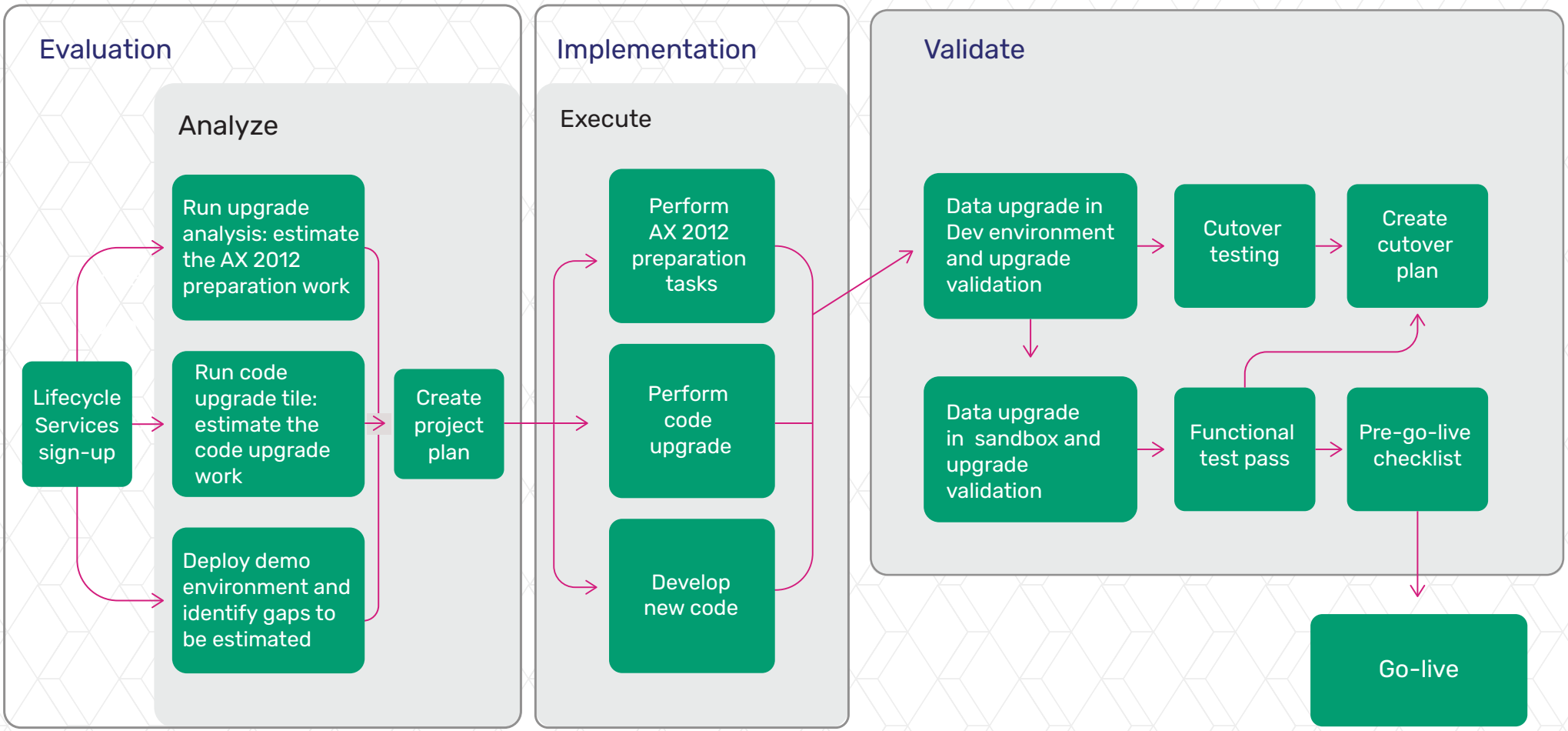
# Process of Upgrade – AX2012 to D365

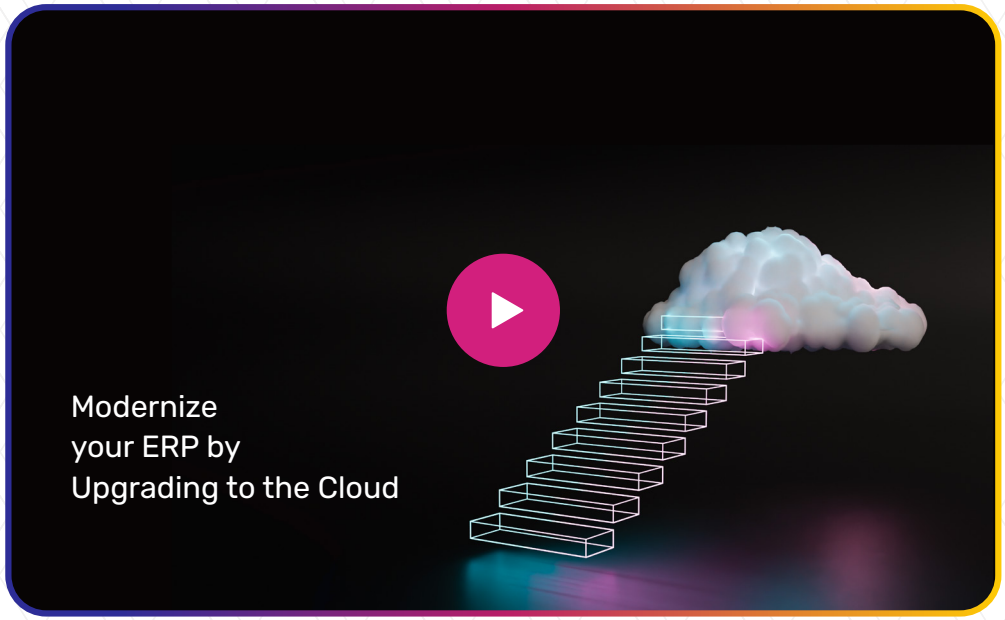


# Why make the move to Dynamics 365 F&O in the Cloud ?

While some of you might be happy to stay on on-premises if you are considering moving to the Dynamics 365 Finance and Operations in the cloud watch our webinar to understand the benefits of the cloud offer.

**Watch Webinar to learn about :**

- Issues of on-prem ERP and benefits of moving to the Cloud
- Features of Microsoft Dynamics 365 Finance and Operations
- Demo of Dynamics 365 Finance and operations
- Demand Forecasting using Machine Learning
- How can Korcomptenz can help you in moving to the Cloud?



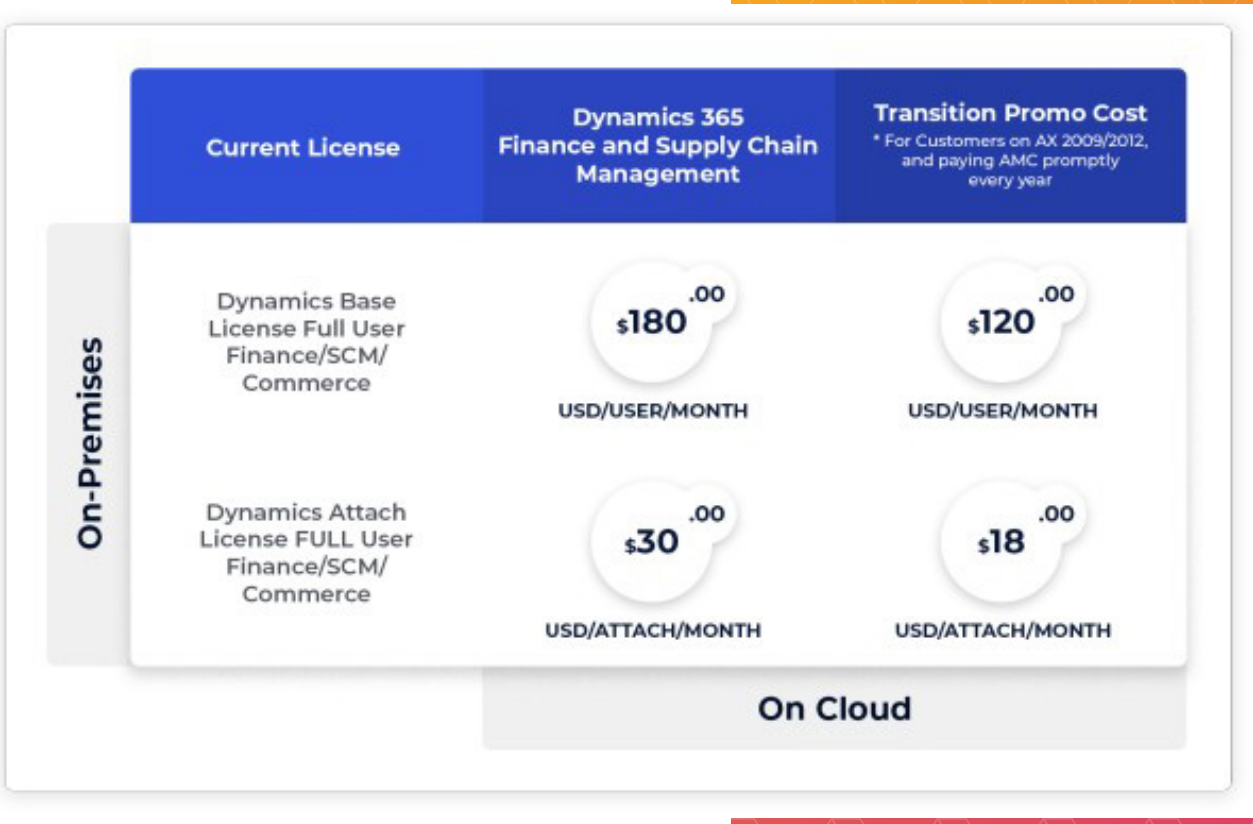
# Why customers should care

| Functionality, Services and Tools | AX 2009 and 4.0 | AX 2012 | AX 2012 R2 | AX 2012 R3 | Dynamics 365 |
|---|---|---|---|---|---|
| New end user experience with enhanced UI | | | | | |
| Reduce customizations (up to 40%) due to added functionality. (e.g. WMS, TSM, Retail) | | | | | |
| Code* and Data migration tools | | | | | n/a |
| Reduce hardware upgrade costs and IT maintenance | | | | | |
| Predictable and repeatable implementations across your organization | | | | | |
| Platform flexibility and elasticity | | | | | |
| Intrusion security, high availability and disaster recovery | | | | | |
| Mobile-ready and access anywhere with cross-platform UI support | | | | | |
| Seamless integration with productivity tools | | | | | |
| Built in BI tools with real-time data insights | | | | | |

**Note:** This table provides only a graphical representation.
For detailed functionality please refer to the product guide* Code update only available for AX2012 deployments

# Transition at a Discount
# Special offer for Dynamics 365 in the Cloud

- Offer valid till June 30th 2022.
- Talk to our Licensing specialist and optimize your usage and savings

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# Option 2 - **Re-implementation**

# When should I consider re-implementation and is it worth it?

Re-implementation is nothing more than a new implementation where instead of migrating all your data from older versions of Dynamics AX to Dynamics 365, you implement Dynamics 365 Finance and Operations as a new application and just migrate the data like master data and opening balances etc.

**The outcome of a reimplementation is a more relevant, nimble and modern system, and that allows for easier adoption of new features part of Microsoft's continuous upgrades.**

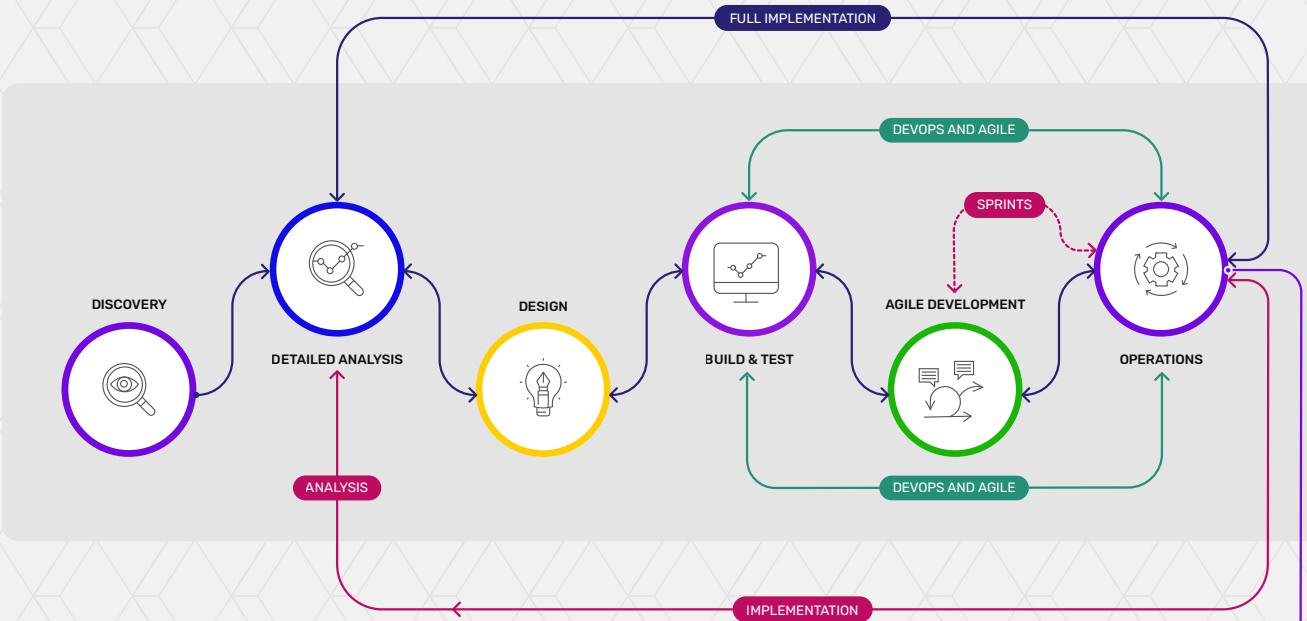
- Re-assess your existing processes and only take the data and customizations you need.
- Allows you to do away with unnecessary customizations.
- Gives you better functionality as just upgrading would restrict some of the functionality which Dynamics 365 offers as some of your old data and customizations might not be supported in the new version.

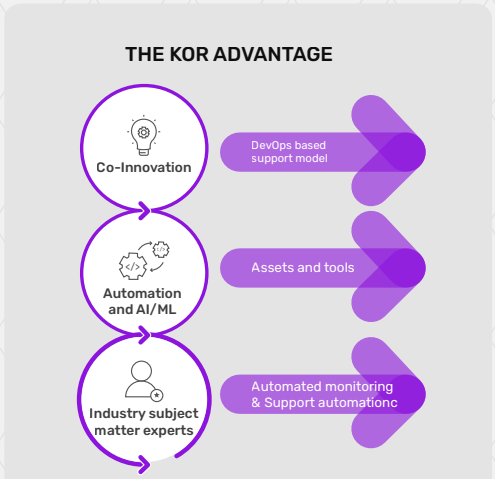
A Re-implementation is the best choice in this scenario as it will help to change the current outdated process setup and add new and better functionality. But a re-implementation should be considered only when an upgrade/migration is not feasible.

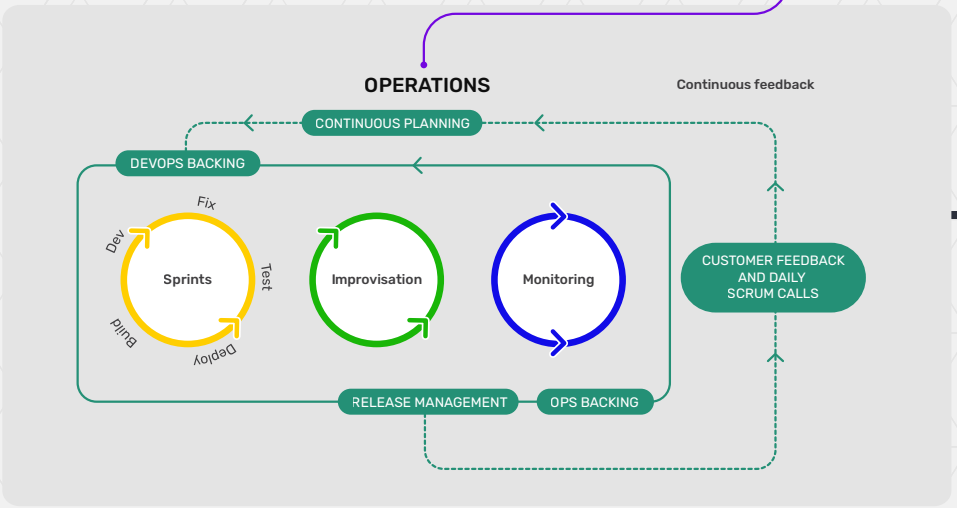
# Pros and Cons of Re-implementation

| Pros | Cons |
| --- | --- |
| If your AX implementation is not providing the desired results or your business has gone through a major process changes, automations etc. re-implementation is a beautiful opportunity to revisit your business processes, automation requirements etc. and implement a neat system for your use | Re-implementation is time consuming and costly. One way it helps redesigning process and documenting the same |
| Some of the customizations you have done in AX may be available as standard features, integrations with 3rd party applications can be done using standard connectors or better methods of integrations provided by Microsoft. | Loss of transactional data. For some it may be good but old data can be moved to a Data Warehouse and reports can be generated with the current data. |
| New enhancements and additional features available in D365 will eliminate some of the manual processes or done through other applications | It's time-consuming and expensive. Typically, this approach takes more consulting power to redesign processes, configure the new system, unit test, write specifications and so on. |

# Our Unique Sure Step Methodology with Microsoft Dynamics 365 is designed with a #FocusOnYou




This diagram highlights the steps that need to be followed to move your Dynamics AX Applications to Dynamics 365 Finance and Operations with re-implementation.

Korcomptenz' s unique methodology ensures that you save 40% on all your implementation and support projects.

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Still confused on which option to choose? Consult our experts and avail our complimentary assessment

# Complimentary Assessment

The project implementation can take from 6 months to 8 months depending on the requirement. Request a consultation for a detailed discussion.

While helping many of our customers with the question of reimplementation or upgrade we found they had many concerns or questions. Check out our FAQ's to find out what they are.

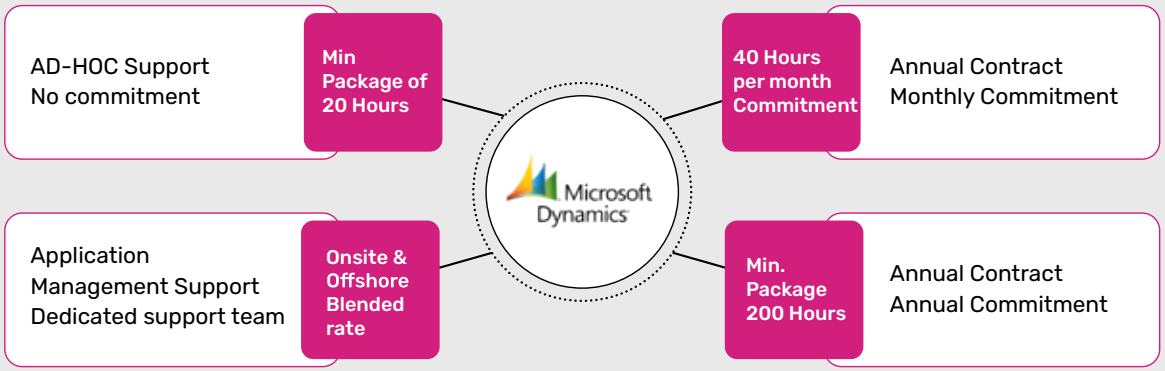
| | | |
|---|---|---|
| Session 01 | **Review of your current IT Systems** | • Study & understand your current ERP process coverage, gaps or pain areas if any and key components that you use and how these may be available in Dynamics 365<br>• Reviewing current licenses and provide estimates of new needs for licensing in the new Dynamics 365 environment<br>• Study of the Infrastructure components based on your need.<br>• Assess Data migration needs |
| Session 02 | **Business Process Assessment** | • What major customizations / integrations exist.<br>• Who is the majority stake holder in the current ERP – IT, Finance, Operations?<br>• Third party solutions if applicable<br>• Any other IT Strategic Consultation and compliance mandates you may need |
| Session 03 | **Deliverables** | • A high-level recommendation on upgrade or reimplementation<br>• High level Project plan with estimated costs and timelines<br>• Potential risk and challenges<br>• Potential Risks, Challenges with a mitigation plan. |

**Note: An on-site assessment will incur additional charges**

Not Looking to Migrate yet?
Avail our support services with our multiple engagement model

# Korcomptenz AX Support Services

## ENGAGEMENT MODELS




### Our Current Models Helps

- Large Enterprises ( BN+)
- Medium Enterprises (50-1 BN)
- Mid-Size Business (25-50 MN)
- Small Business

## SUPPORT SERVICES OFFERINGS

- System Assessment
- Web and Mobile Integrator
- Testing
- Report + Analytics
- Biztalk and Azure Integration Services
- Performance Fine Tuning and Optimization
- Licensing and Subscription
- Integration with 3rd Party application
- Maintenance Services
- Customization
- Trouble Shooting
- Upgrade and Migration Service
- Customer Portal + Mobile Apps.
- Health Check
- Advisory and Consultation and more

## TECHNOLOGIES WE SUPPORT

Microsoft Dynamics 365 Finance & Operations
Microsoft Dynamics CRM
Microsoft Dynamics NAV
Microsoft Dynamics GP
Microsoft Dynamics 365 Business Central
Microsoft Dynamics 365 Customer Engagement

# Korcomptenz

Korcomptenz is a technology transformation provider that partners with clients to improve their digital experience and insight. We unlock the power of technology in the areas of ERP, CRM, infrastructure management, and cloud to empower our clients with intelligent and experiential solutions. We #FocusOnYou.

Discover how we #FocusOnYou at www.korcomptenz.com

## Get in touch with us:

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Want to know more? Here are some additional notes for your reference

# Industry functionality – Financial Management

| Functionality, Services and Tools | AX 2009 and 4.0 | AX 2012 | AX 2012 R2 | AX 2012 R3 | Dynamics 365 |
|---|---|---|---|---|---|
| Shared currencies, fiscal periods and chart of accounts | ○ | ● | ● | ● | ● |
| Unlimited number of dimensions, standard tables could be used as dimension values and accounting structure to define postings rules to general ledger | ○ | ● | ● | ● | ● |
| Bank statements import and advanced bank reconciliation | ○ | ○ | ● | ● | ● |
| SEPA direct debit | ○ | ○ | ○ | ● | ● |
| Electronic reporting | ○ | ○ | ○ | ○ | ● |
| Requiring free text invoices, free text invoices line and priority payment settlement | ○ | ● | ● | ● | ● |
| Collection management | ◑ | ● | ● | ● | ● |
| Budget control | ○ | ● | ● | ● | ● |
| Budget planning | ○ | ○ | ○ | ◑ | ● |
| Enterprise credit management | ○ | ○ | ○ | ○ | ● |

**Note:** This table provides only a graphical representation.
For detailed functionality please refer to the product guide

MOST ● ◔ ◑ ◔ ○ LEAST

# Industry functionality – Financial Management

| Functionality, Services and Tools | AX 2009 and 4.0 | AX 2012 | AX 2012 R2 | AX 2012 R3 | Dynamics 365 |
|---|---|---|---|---|---|
| Public secretor and Commitment accounting | | | | | |
| Cost accounting | | | | | |
| Financial period close management | | | | | |
| Using grants in Project management | | | | | |
| Project budgeting | | | | | |
| Projects and timesheets online experience | | | | | |
| Book workers as resources on projects | | | | | |
| Human resources management | | | | | |
| Manager serf service | | | | | |

**Note:** This table provides only a graphical representation.
For detailed functionality please refer to the product guide

# Industry functionality – Organization-Wide

| Functionality, Services and Tools | AX 2009 and 4.0 | AX 2012 | AX 2012 R2 | AX 2012 R3 | Dynamics 365 |
|---|---|---|---|---|---|
| Role based security | ○ | ● | ● | ● | ● |
| Organization hierarchy to manage financial reporting, employee position related security, centralized payments | ○ | ● | ● | ● | ● |
| Global address book to manage organization wide contacts and relations | ○ | ● | ● | ● | ● |
| Workflows for process management | ◑ | ● | ● | ● | ● |
| Task recorder integrated with Help on demand | ○ | ○ | ○ | ○ | ● |
| Microsoft office integration | ○ | ◔ | ◔ | ◔ | ◔ |
| Case management | ○ | ◕ | ◕ | ● | ● |

**Note:** This table provides only a graphical representation.
For detailed functionality please refer to the product guide

MOST ● ◕ ◑ ◔ ○ LEAST

# Industry functionality – Procurement Management

| Functionality, Services and Tools | AX 2009 and 4.0 | AX 2012 | AX 2012 R2 | AX 2012 R3 | Dynamics 365 |
|---|---|---|---|---|---|
| Procurement hierarchies and accounting distribution | ○ | ● | ● | ● | ● |
| Purchase agreements | ○ | ● | ● | ● | ● |
| Purchase requisition | ◔ | ● | ● | ● | ● |
| Procurement policies | ○ | ● | ● | ● | ● |
| Change management on purchase orders | ○ | ○ | ● | ● | ● |
| Rebates and Royalties | ○ | ○ | ○ | ● | ● |
| eProcurement and vendor collaboration | ○ | ○ | ○ | ● | ● |
| Supplier relationship management and vendor self-service portal | ○ | ◑ | ◑ | ● | ● |

**Note:** This table provides only a graphical representation.
For detailed functionality please refer to the product guide

MOST → LEAST

# Industry functionality – Manufacturing

| Functionality, Services and Tools | AX 2009 and 4.0 | AX 2012 | AX 2012 R2 | AX 2012 R3 | Dynamics 365 |
|---|---|---|---|---|---|
| Manufacturing resources and capability-based operation scheduling | ○ | ● | ● | ● | ● |
| Process manufacturing | ○ | ○ | ● | ● | ● |
| Product configurator | ◔ | ● | ● | ● | ● |
| Lean manufacturing | ◑ | ◕ | ● | ● | ● |
| Project budgeting | ◔ | ◑ | ◕ | ◕ | ● |
| Projects and timesheets online experience | ○ | ● | ● | ● | ● |
| Book workers as resources on projects | ○ | ○ | ○ | ○ | ● |
| Human resources management | ◔ | ● | ◕ | ◕ | ● |
| Manager serf service | ○ | ○ | ○ | ○ | ● |
| Asset management | ○ | ○ | ○ | ○ | ● |
| Near real time demand planning | ○ | ○ | ○ | ○ | ● |

**Note:** This table provides only a graphical representation.
For detailed functionality please refer to the product guide

MOST ● ◕ ◑ ◔ ○ LEAST

# Industry functionality – Warehouse Management and Transportation

| Functionality, Services and Tools | AX 2009 and 4.0 | AX 2012 | AX 2012 R2 | AX 2012 R3 | Dynamics 365 |
|---|---|---|---|---|---|
| nventory management and demand forecasting | ○ | ○ | ◔ | ● | ● |
| Multisite advanced warehouse management | ○ | ○ | ○ | ○ | ● |
| Order promising | ○ | ◔ | ◔ | ● | ● |
| Distribution planning | ○ | ○ | ○ | ● | ● |
| Transportation management | ○ | ○ | ◔ | ● | ● |
| Product Change Management | ○ | ○ | ○ | ● | ● |
| Master data management | ○ | ○ | ○ | ● | ● |

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r detailed functionality please refer to the product guide

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