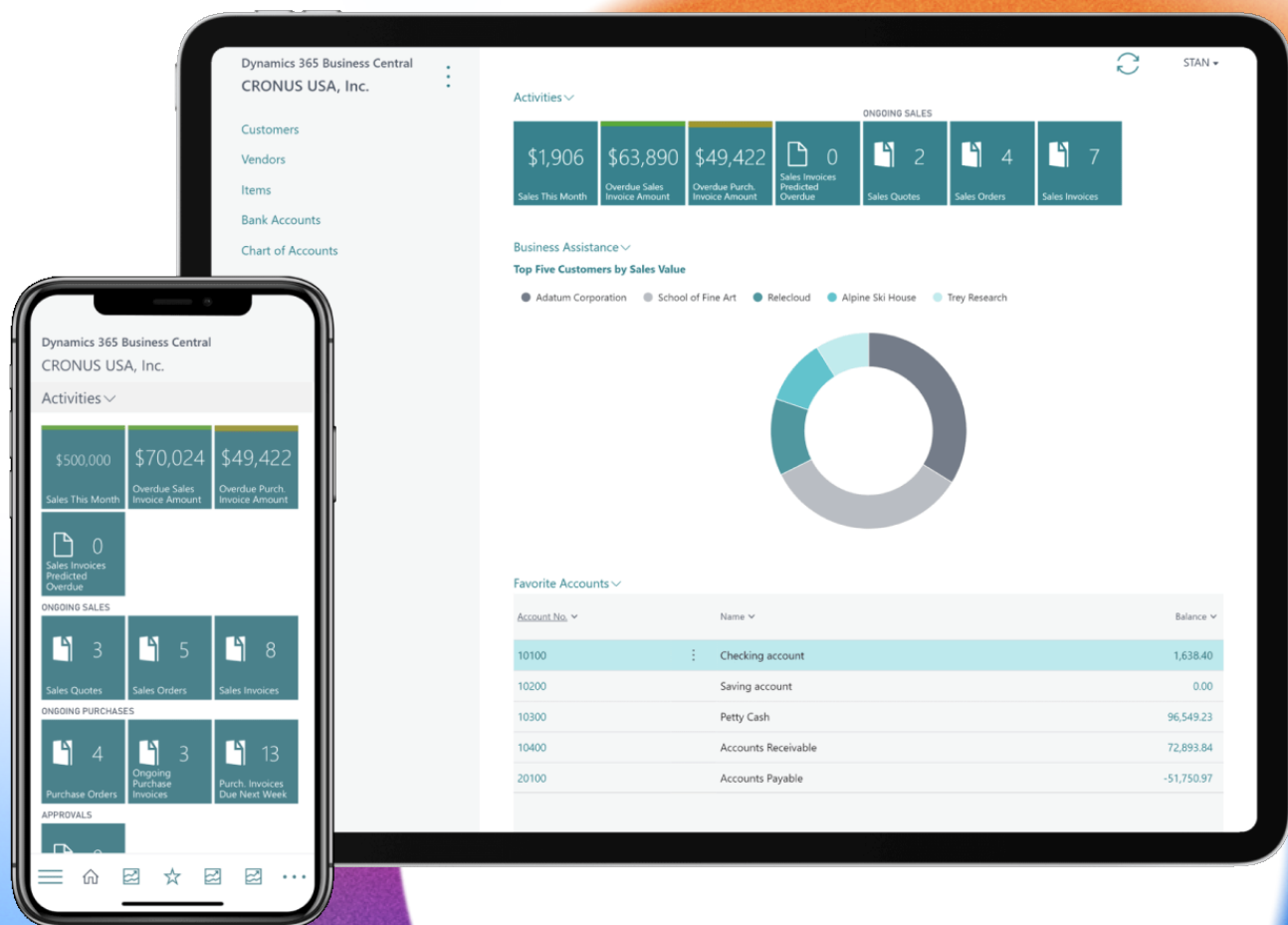


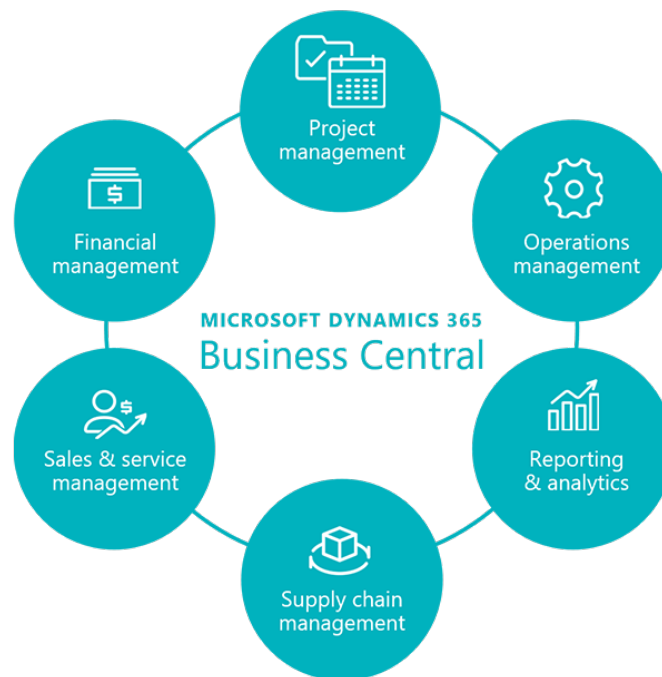
# ENTERPRISE RESOURCE PLANNING (ERP) QUESTIONNAIRE GUIDE

This is what you need to know, before you implement Dynamics 365 Business Central



## 1) What is an ERP system?

An ERP (enterprise resource planning) system is software platform businesses use to manage and integrate data across core processes such as finance, procurement, manufacturing, and supply chain. ERP systems centralize data, streamline operations, and enhance decision making across the organization.



## 2) Why should we need an ERP system?

An ERP (Enterprise Resource Planning) system is essential for businesses to integrate and streamline their operations across various departments such as finance, human resources, inventory, and supply chain management. By consolidating data and processes into a single unified system, ERP improves efficiency, enhances data accuracy, and provides real-time insights that facilitate informed decision-making. This leads to reduced operational costs, improved productivity, and better scalability, enabling businesses to respond quickly to market changes and customer demands.

## 3) Should we need on-premises or cloud solutions?

Deciding between on-premises and cloud ERP solutions depends on your business needs and resources. On-premises ERP offers greater control, customization, and

data security, making it suitable for companies with specific compliance requirements or in-house IT ability. In contrast, cloud ERP provides flexibility, scalability, and lower upfront costs, ideal for businesses seeking rapid deployment and reduced IT maintenance. Evaluate your company's size, budget, and long-term goals to decide the best fit.

#### **4) Who can use Dynamics 365 Business Central ERP?**

Business Central is designed for small to medium-sized businesses across various industries, including wholesale distribution, manufacturing, retail, and services. It caters to companies looking to streamline their operations with comprehensive solutions for finance management, supply chain management, project management, sales, and customer service. With its robust functionality and flexibility, Business Central ERP is ideal for businesses looking to integrate and automate their processes, enhance decision-making, and support growth through a scalable, cloud-based platform.

#### **5) How do Outlook, excel and teams work together with Business Central?**

Business Central provides seamless connectivity to Outlook, Excel, and Teams, enabling employees to collaborate and access data in the tools they use daily. For instance, you can share business data such as product details in Teams, eliminating the need to switch between applications.

#### **6) How can I try Business Central?**

Get started today with a [free 30-day trial](#) of Business Central or take a quick self-service guided tour. See why over 30,000 small and medium-sized businesses have chosen Business Central to adapt faster, work smarter, and perform better.

#### **7) What type of licenses are available in Business Central?**

Dynamics 365 Business Central offers several types of user licenses to accommodate various user roles and needs. These include "Essential" users, who need core functionalities like finance management, supply chain management, sales, and purchasing. "Premium" users have access to all the functionalities of Essential users plus service order management, manufacturing, and advanced

inventory. There are also "Team Member" licenses, which are for users who need limited access to the system for tasks like time entry or viewing reports. Each license type is tailored to different user requirements and comes with a specific set of permissions and capabilities within the Business Central environment.

## 8) What is the cost of a Business Central subscription?

### Annual Commitment price (paid monthly)

Essential user priced \$70 per user month, Premium user price \$100 per user month, and team member price \$8 per user month.

### Monthly (no commitment)

Essential user priced \$84 per user month, Premium user price \$120 per user month, and team member price \$9 per user month.

## 9) Where can I find a list of Business Central capabilities?

For a more detailed overview, download the Business Central capability guide.

<https://www.navisiontech.com/download-dynamics-365-business-central-capability-guide/>

Also, you can read more about it here, below.

Below is the list of capabilities of Business Central.

## Essential user

Finance Management			
Account Schedules	Basic XBRL	Deferrals	Responsibilities Centers
Allocations	Budgets	Electronic Payments/Direct Debits	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	Intercompany Postings		
Artificial Intelligence			
Cash Flow Forecast	Late payment Predication	Image Recognition	Inventory Forecast
Sales Forecast			
Customer Relationship Management			
Business Inbox for Outlook	Contract Classification	Email Logging	Relationship Management
Campaign Management	Contact Management	Interaction/Document Management	Task Management
Campaign pricing	Dynamics 365 Sales Integration	Opportunity Management	-

E-Services			
Bank Feeds (US, CA)		Online Map	Tax. Reg. No. Validation Services (EU)
Document Exchange Service	Document Management, Document Capture		
Human Resource Management			
Basic Human Resources	-	-	-
Project Management			
Basic Resource	Job Quotes	Project Management Tools	-
Capacity Management	Multiple Cost	Time Sheet	-
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
Basic Inventory	Item Cross References	Purchase Return Order Management	Shipping Agents

Basic Receivables	Item Substitutions	Requisition Management	Standard Costs Worksheet
Basic Payables	Item Tracking	Demand Forecasting	Stock Keeping Units
Calendars	Location Transfers	Sales Invoice Discount	Vendor Catalogue Items
Cycle Counting	Multiple Locations	Sales Invoicing	-
Drop Shipments	Order Promising	Sales Line Discounting	-
<b>Warehouse Management and Inventory</b>			
Automated Data Capture System	Internal Picks and Put Aways	Warehouse Shipment	Warehouse Receipt
Bin Set-Up	Pick	Warehouse Management Systems	-
<b>Other Capabilities</b>			
Analysis Reports	Intrastat	Retention Policies	Workflow
Change Log	Job Queue	Unlimited Companies	Word Reports/Document Reporting
Embedded Power BI	Notification (On- Premises only)	User Management	-
Extended Text	Reason Codes	User Tasks	-

**Premium User**

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

## 10) What is the total cost of Business Central implementation?

The total cost of implementing Dynamics 365 Business Central can vary significantly based on the package chosen and the specific needs of the business. Navisiontech offers three main packages: Core, starting at **\$21,995**; Essential, starting at **\$45,995**; and Advanced, starting at **\$74,995**. These packages are designed to cater to various levels of complexity and functionality required by the business. Additional costs may arise from customizations, integrations, and ongoing support. It's crucial for businesses to evaluate their requirements carefully to choose the package that best fits their needs and budget. For more details, please visit <https://www.navisiontech.com/best-erp-for-wholesale-and-distribution-businesses/>

## 11) Can we customize Business Central?

Absolutely, Business Central is highly customizable. It allows businesses to tailor the software to their unique needs through extensions and customizations without altering the core code. This flexibility enables companies to add specific functionalities, integrate with other systems, and change workflows to better suit their operational processes. Whether it is using third-party apps available on AppSource or developing custom extensions, Business Central provides the tools to create a solution that aligns perfectly with your business requirements.

## 12) Does Business Central provide a facility to import data from another legacy system?

Yes, Microsoft Dynamics 365 Business Central provides tools and features to help import data from another legacy system. It offers various methods such as Data Migration Wizard, Configuration Packages, and Rapid Start Services. These tools allow users to map data from their legacy system to Business Central's data structure, ensuring a smooth transition of data. Additionally, Business Central

supports integration with other systems through web services, making it easier to import data from external sources.

### **13) What is the extension marketplace in Business Central?**

The extension marketplace in Business Central, known as AppSource, is a platform where users can find, try, and buy extensions and apps to enhance the functionality of Microsoft Dynamics 365 Business Central. These extensions are developed by Microsoft and third-party vendors and can be seamlessly integrated into Business Central to provide added features and capabilities tailored to specific business needs.

#### **Key Features of AppSource:**

- A. **Wide Range of Extensions:** Offers a variety of extensions covering different business areas such as finance, sales, supply chain, project management, and more.
- B. **Ease of Integration:** Extensions can be easily added to your Business Central environment without complex customizations, ensuring smooth and quick integration.
- C. **Free and Paid Options:** Provides both free and paid extensions, allowing businesses to choose solutions that fit their budget and requirements.
- D. **Trial Periods:** There are extensions that come with a free trial. It will allow users to evaluate the functionality before making a purchase decision.
- E. **User Reviews and Ratings:** Features user reviews and ratings to help businesses make informed decisions based on the experiences of other users.
- F. **Regular Updates:** Extensions are regularly updated by their developers to ensure compatibility with the latest versions of Business Central and to add new features.

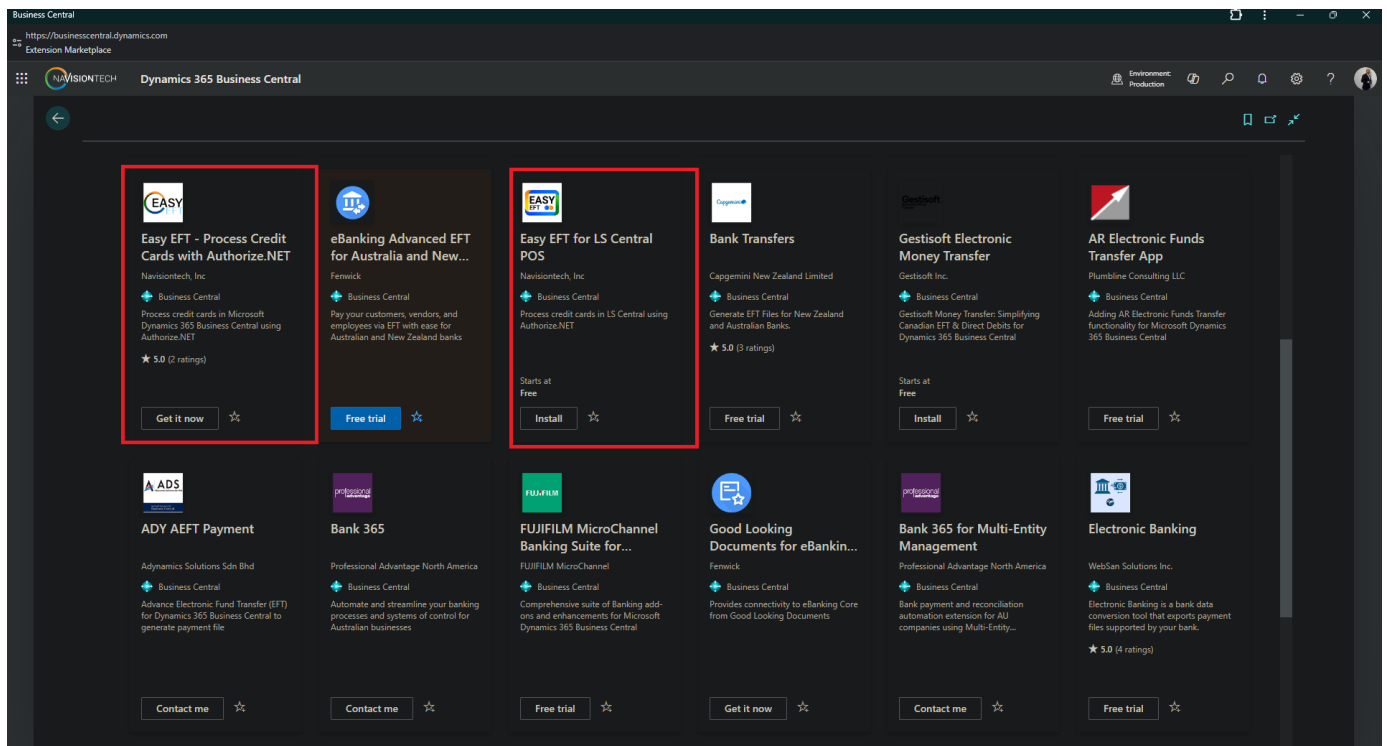
#### **How to Access AppSource:**

- A. Within Business Central: You can access AppSource directly from within your Business Central application. Navigate to the "Extensions" area and click on "AppSource" to browse and install extensions.
- B. Microsoft AppSource Website: You can also visit the Microsoft AppSource website ([appsource.microsoft.com](https://appsource.microsoft.com)) to explore and buy extensions for Business Central and other Microsoft products.

### Popular Extensions in AppSource:

- A. Banking and Payment Solutions: Extensions for integrating various banking services and payment gateways.
- B. Inventory and Warehouse Management: Tools for optimizing inventory tracking, warehouse operations, and planning.
- C. E-commerce Integration: Solutions to connect Business Central with popular e-commerce platforms.
- D. Reporting and Analytics: Extensions that enhance reporting capabilities and provide advanced analytics.

Using AppSource, businesses can tailor their Business Central experience to better meet their specific operational needs. Let's say if you are using Business Central and searching for [credit card processing software](#), Microsoft AppSource allows you to find such apps. As shown in the screenshot.



## 14) Does Business Central have a manufacturing module?

Yes, Dynamics 365 Business Central includes a comprehensive manufacturing module designed to help businesses streamline and manage their manufacturing processes. This module supports a variety of functionalities, including production planning, scheduling, inventory management, and capacity planning. It allows businesses to efficiently track production orders, manage bills of materials (BOM), and oversee the entire production workflow, ensuring improved productivity and cost control. This integrated approach helps manufacturers optimize their operations and respond swiftly to market demands.

## 15) Does Business Central offer eCommerce integration?

Yes, Microsoft Dynamics 365 Business Central offers eCommerce integration capabilities, allowing businesses to seamlessly connect their online storefronts with their Business Central. Through various connectors and extensions, users can synchronize product catalogs, inventory levels, orders, and customer information between Business Central and popular eCommerce platforms such as Shopify, Magento, WooCommerce, and others. This integration streamlines operations, improves efficiency, and enhances the overall customer experience by providing real-time data synchronization and centralized management of both online and offline sales channels.

We have covered the most common question asked in our ERP questionnaire guide. We hope it was informative and has inspired you to consider Dynamics 365 Business Central for your growing business.

Should you have any questions or concerns, feel free to reach out to us at [sales@navisiontech.com](mailto:sales@navisiontech.com). You can also take advantage of our complimentary need analysis session.

You can also visit [www.navisiontech.com](http://www.navisiontech.com) to look at our product offerings/packages.

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