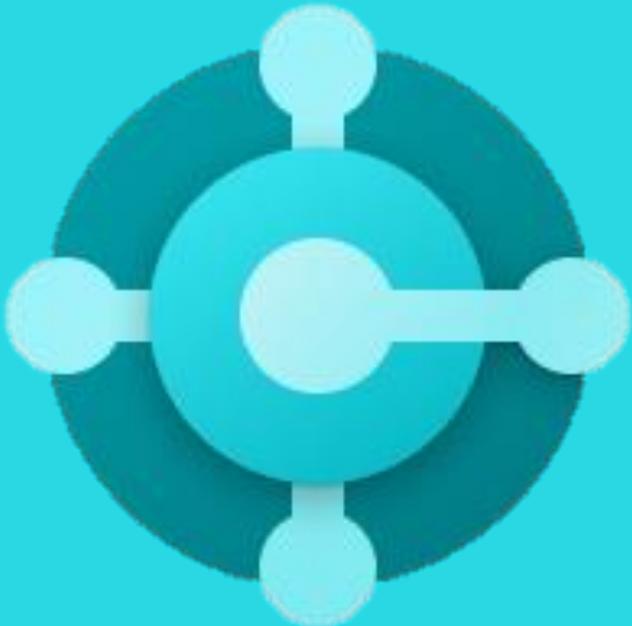


Get the visibility, collaboration, and agility needed to drive success across your project-centric business—from prospects to payments to profits

# Dynamics 365 Business Central

Customization, Development and Consulting Practice



Cognitive Convergence

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+1 4242530744

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# About Us

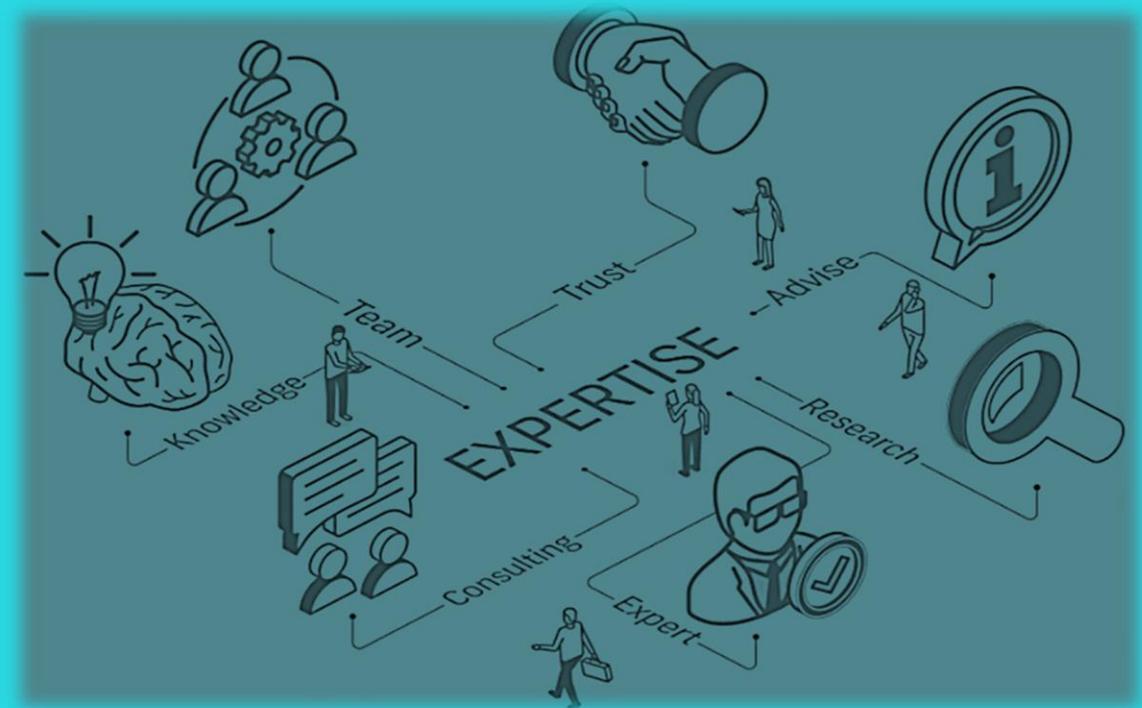
Cognitive Convergence is a subject matter expert in Dynamics 365 Business Central consulting having certified and experienced consultants which will create custom, robust, and scalable apps for different business needs in no time.

Our core Dynamics 365 Business Central consulting are:

- ✓ Automate workflows and processes.
- ✓ Accelerate financial closing and reporting
- ✓ Make more profitable financial decisions
- ✓ Prioritization of leads based on revenue potential
- ✓ Improve cash management
- ✓ Track customer returns and repairs
- ✓ Improve project costing and accounting
- ✓ Optimize resource levels
- ✓ Drive profitability with project insights
- ✓ Improve supplier engagement
- ✓ Predict stock replenishment

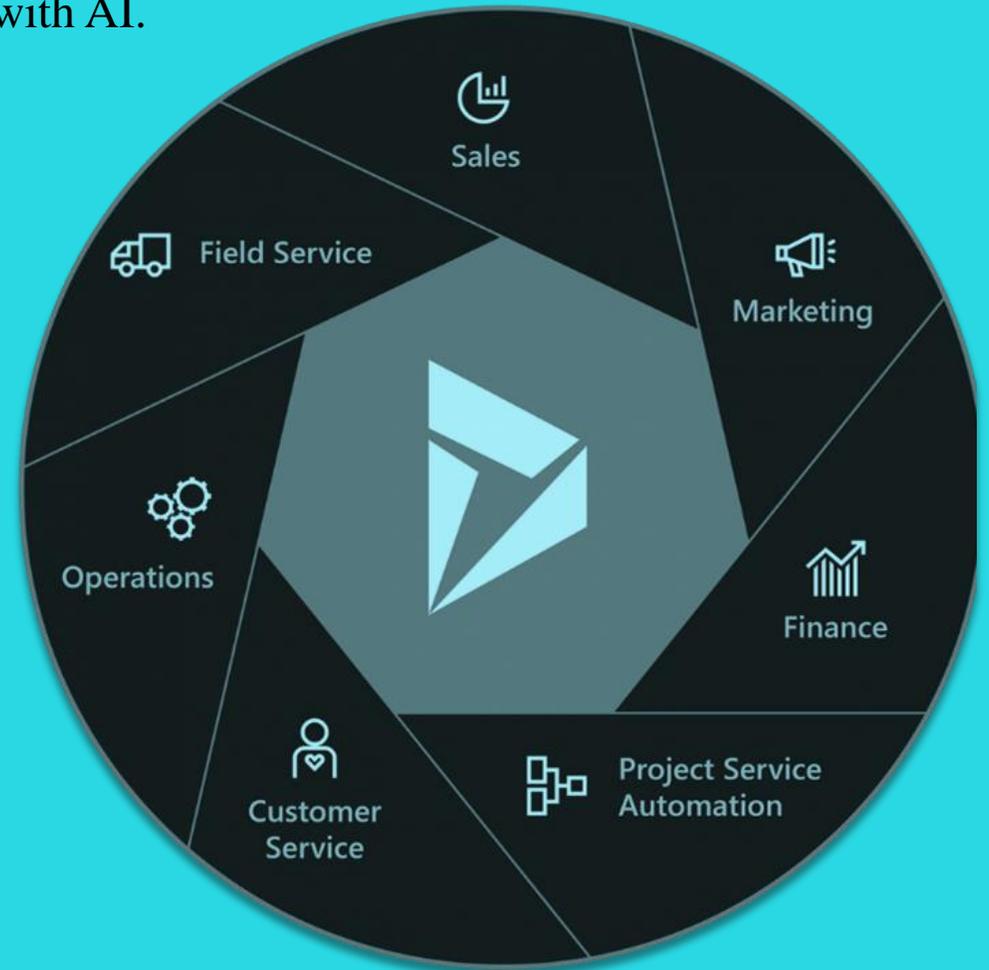
**Current Location: Lahore, Pakistan**

**Planned Front-end Office: California/Washington States- USA**



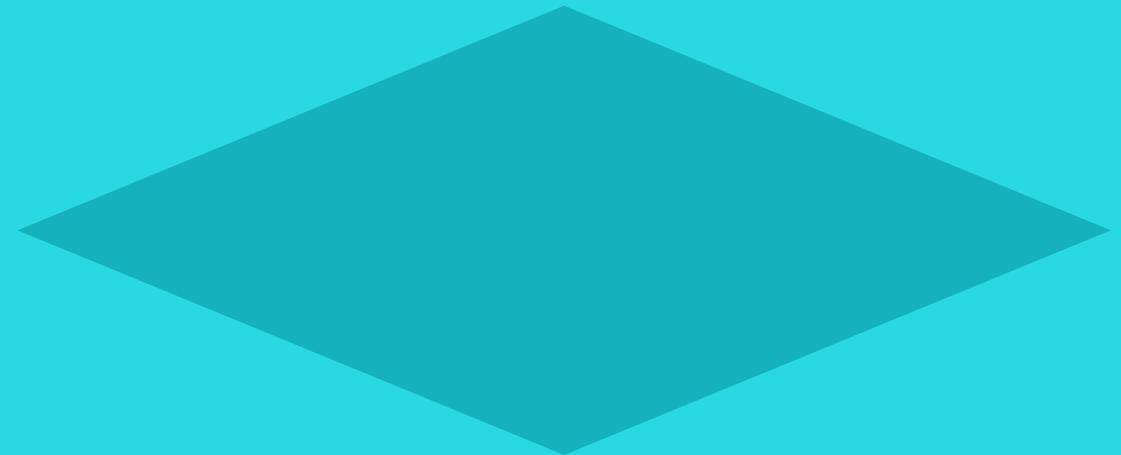
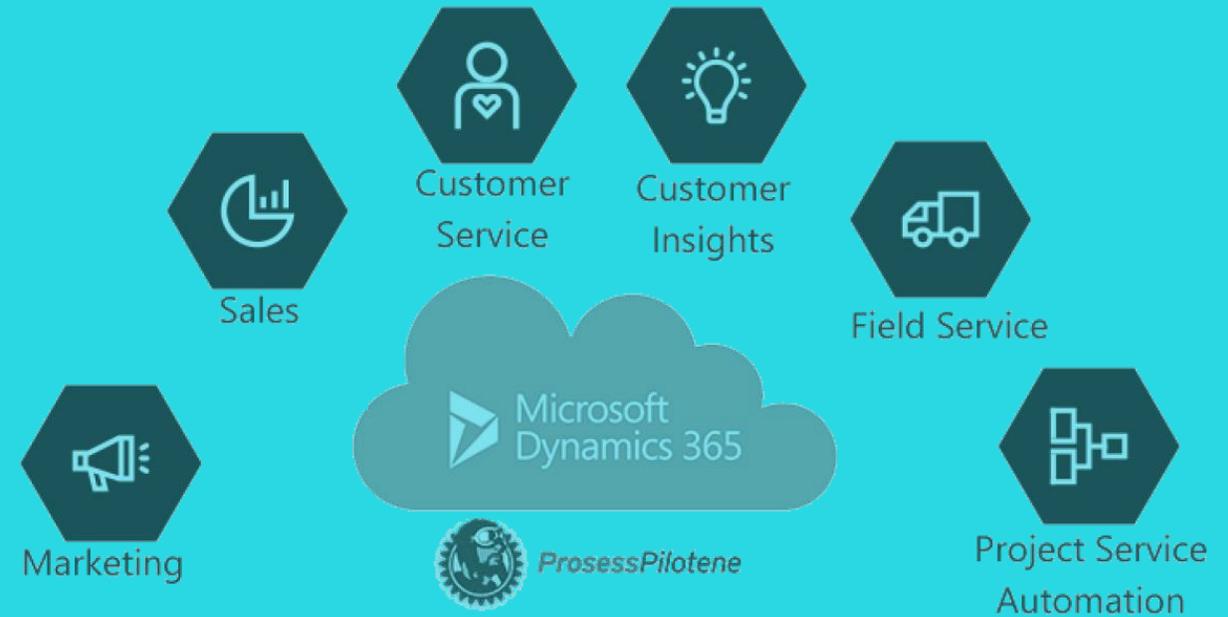
# Microsoft Dynamics 365

- ✓ Microsoft Dynamics CRM, an excellent customer relationship management (CRM) software.
- ✓ Accelerate the business growth with connected business applications to optimize the operations.
- ✓ Drive better outcomes across the business by combining the data with AI.
- ✓ Encryption, and role-based access to auditing and logging.
- ✓ Handle customer databases efficiently.
- ✓ Tackle customer service problems.
- ✓ Deliver more value in less time.
- ✓ Enable teams to accelerate results.



# Modules of Dynamics 365

- ✓ Customer Service
- ✓ Field Service
- ✓ Finance and Operations
- ✓ Marketing
- ✓ Project Operations
- ✓ Retail
- ✓ Sales
- ✓ Human Resources
- ✓ Supply Chain Management
- ✓ Business Central
- ✓ Commerce



# Business Central

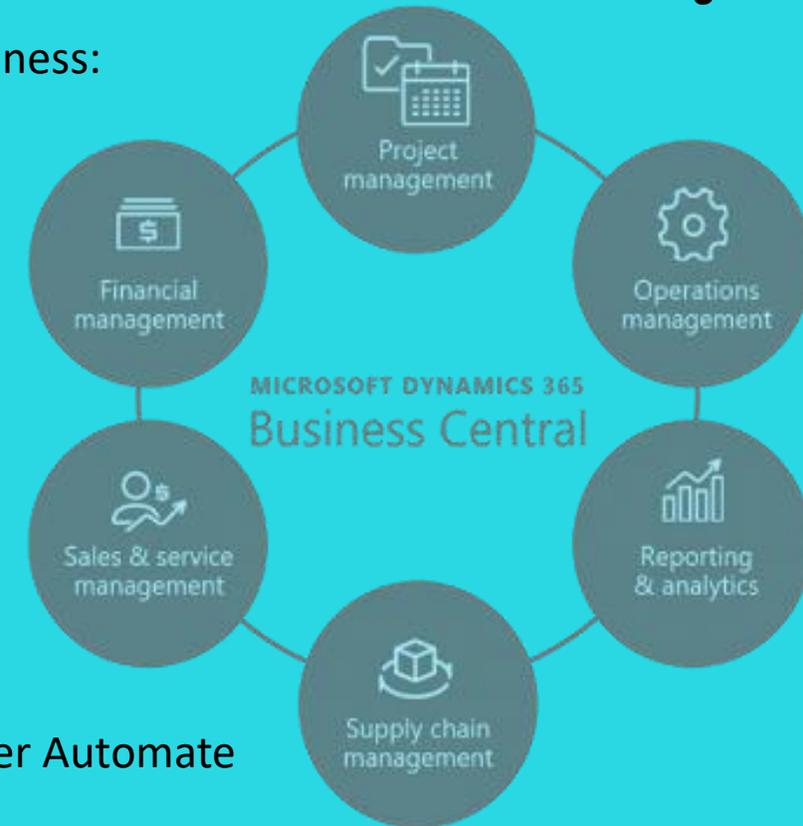
- ✓ An enterprise resource planning (ERP) system from Microsoft
- ✓ A business management solution for small and mid-sized organizations
- ✓ Automates and streamlines business processes
- ✓ Helps organizations manage the business.
- ✓ Adopt new business models faster with flexible deployment, reliability, security, and an adaptable solution
- ✓ Fast to implement, easy to configure
- ✓ Simplicity guides innovations in product design, development, implementation, and usability



# Dynamics 365 Business Central's features and functionality

With Dynamics 365 Business Central's features you can revolutionize how you do business:

- ✓ Taking streamlining
- ✓ Automation
- ✓ Customer engagement to a new level
- ✓ It gives you a single, end-to-end solution for managing finances:
  - Operations
  - Sales
  - Customer service
  - As well as the opportunity to easily upgrade from entry-level accounting software and legacy ERP systems
- ✓ Integrates with other Microsoft cloud services (including Office 365)
- ✓ Can be customized or extended for specific industry needs with Power Apps, Power Automate and Power BI.
- ✓ Next generation of what was previously known as Navision, and later Dynamics NAV
- ✓ Set of trusted, proven technologies.



Have served 160,000 customers and millions of users worldwide

# Functionality Overview

Functionality	Description
<b>Finance</b>	Make and collect payments, manage your cash flow, defer income and revenue, prepare year-end closing, and manage fixed assets.
<b>Business Intelligence</b>	Get insight to the performance of your business activities through budgets, account schedules, and analysis views.
<b>Sales</b>	Manage sales processes and information, such as quotes, orders, returns, and customer accounts, and make drop shipments.
<b>Purchasing</b>	Manage purchasing processes and information, such as invoices, orders, returns, and vendor accounts, and purchase items from sales documents.
<b>Inventory</b>	Register new inventory or service-type items, categorize items for easy searching, adjust inventory levels, and perform common inventory costing tasks.
<b>Project Management</b>	Create jobs and schedule resources for project, manage job budgets, monitor progress, and track machine and employee hours.
<b>Fixed Assets</b>	Organize your fixed assets, ensure correct periodic depreciation, and keep track of maintenance costs.
<b>Relationship Management</b>	Manage and support your sales efforts and focus your interactions on preferred customers and contacts.

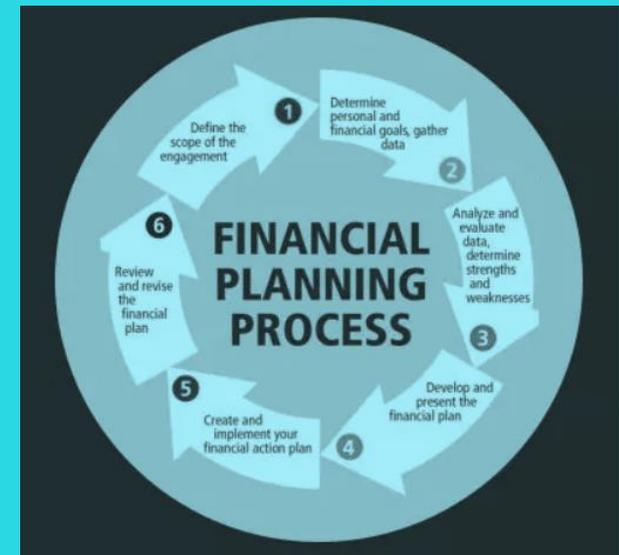
# Functionality Overview

<b>Human Resources</b>	Keep detailed records of your employees and register absence for analysis purposes.
<b>Planning</b>	Plan the production operations that are required to transform inputs into finished goods.
<b>Assembly Management</b>	Put sellable items together in simple steps to make a new item, such as a kit.
<b>Manufacturing</b>	Define shop floor resources and their capacity, schedule operations, pull production components, and execute production operations.
<b>Warehouse Management</b>	Ensure an effective flow of goods that are received and shipped.
<b>Service Management</b>	Schedule service calls and set up service orders, and track repair parts and supplies.
<b>Workflow</b>	Set up and use workflows that connect tasks performed by different users or by the system, such as automatic posting. Requesting and granting approval to create or post documents are typical workflow steps.
<b>Exchanging Data Electronically</b>	Enable users to exchange data with external sources during daily tasks, such as sending/receiving electronic documents, importing/exporting bank files, and updating currency exchange rates.
<b>Incoming Documents</b>	Record external documents in Business Central, including their file attachments, and then manually create the related documents or automatically convert the files to electronic documents.

# Financial Management – General

## Financial Management functionality in Business central management:

- ✓ Provides mature and functionally rich finance solution
- ✓ Providing core functionality
- ✓ Addressing the more complex requirements such as multi-currency and multi-company
- ✓ Not only gives executives and other users an optimal platform for operating their business
- ✓ Provides deep insight into the business to help guide operations and strategic initiatives through rich reports and analytics
- ✓ Financial Management element of Dynamics 365 Business Central is the most used function
- ✓ Sales and purchase ledgers are fully integrated with the stock
- ✓ Order processing features
- ✓ Both sales and purchasing ledger can operate independently of the stock and order processing functions



# General Ledger

- ✓ Set up companies and how to post to the general ledger through general journals
- ✓ Use features for VAT and sales tax, recurring journals, and background posting of journals
- ✓ Posting and reporting can be done in one additional reporting currency
- ✓ Use built-in reports, customized reports (both RDCL and Word), refreshable data in Excel, and Power BI reports and charts
- ✓ View and edit the data in most pages using Microsoft Excel



# Dimensions

- ✓ Use unlimited dimensions in transactions in all ledgers for important parts of the business, such as departments, projects, sales channel, and geographical areas
- ✓ Set up rules for how to combine dimensions and dimension values
- ✓ Control the use of dimensions and increase the reliability of output based on dimensions. Assign default dimensions values to master data such as general ledger accounts, customers, vendors, fixed assets, resources, and items.
- ✓ Set up rules to prioritize the use of default values
- ✓ Use data from dimensions in reports for filtering, account schedules to analyze your general ledger, and in data sent to Power BI



# Multiple Currencies

- ✓ Conduct business with customers and vendors in any number of currencies.
- ✓ Use multiple currencies on sales and purchase documents and in bank transactions and payments in payables and receivables
- ✓ Store currency details for transactions in receivables and payables are stored in local and foreign currencies.
- ✓ Adjust currency values in local and foreign currencies for unrealized gains and losses to keep aging reports correct for receivable sand payables



# Budgets

- ✓ Track business progress using budgets in the general ledger
- ✓ Use budgets in financial reports, user-defined analysis in account schedules, or in data
- ✓ sent to Power BI for data sharing and analysis
- ✓ Import budget information to and from Excel for enhanced calculation capabilities when you prepare budgets



# Accounts Schedules

- ✓ A powerful financial reporting tool
- ✓ Accountants and controllers can include essential business data from the chart of accounts, budgets, cash flow accounts and cost types in financial reports
- ✓ Efficiently monitor the health of the business and provide valuable input for business decision makers
- ✓ Define row and column layouts and combinations to generate the report you need
- ✓ Calculate totals and sub-totals and control the print output, for example, to compare current and historical budget figures.



# Consolidation

- ✓ Consolidate companies from the same Business Central tenant and pull data directly into the consolidation company or use XML files to pull data from other Business Central tenants, databases, or third-party business management application
- ✓ Use multiple currencies, dimensions, and budgets for the consolidation

## Intercompany Postings



Manage accounting for more than one company in a posting process that includes one or more Business Central tenants or databases



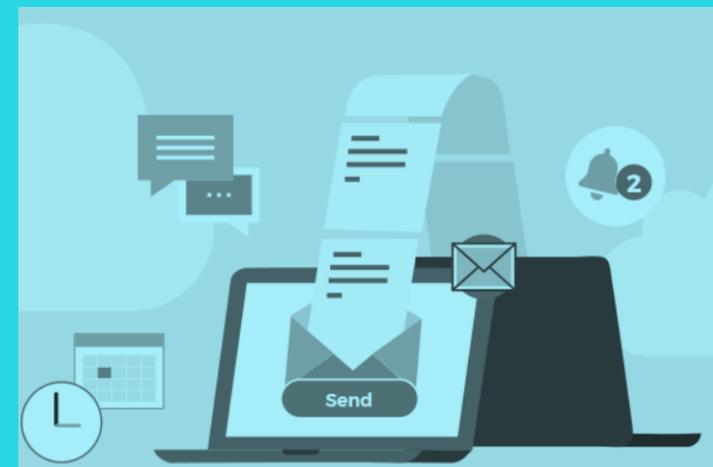
Send sales and purchase documents to partner companies and post journals transactions through a mapping to shared charts of accounts and dimensions



Control the document flow through an Inbox/Outbox feature that automates sending and receipt

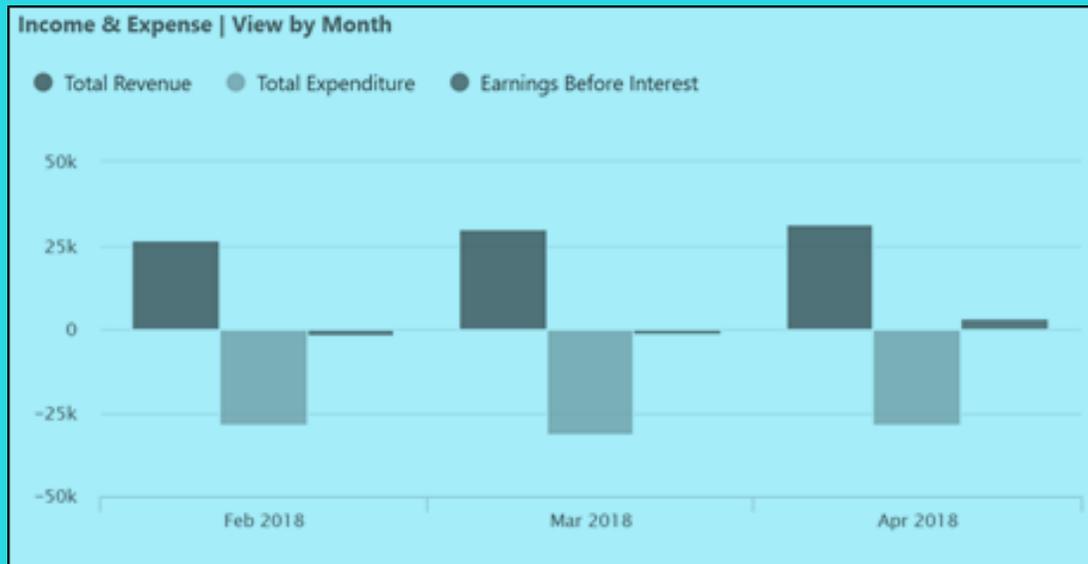


Use sales and purchase documents with multiple currencies to reconcile intercompany balances



# Cash Flow Forecast

- ✓ Predict how the company's liquidity will evolve over time
- ✓ Forecast expected cash receipts and disbursements plus available liquid funds
- ✓ Create basic cash flow forecast set ups that you can extend and adjust
- ✓ assisted setup guide for help completing tasks and take advantage of automatic daily or weekly data updates
- ✓ Include data from jobs and taxes as sources for the cash flow forecast
- ✓ Azure ML capabilities to let Business Central generate cashflow predictions



# Fixed Assets

- ✓ Track fixed assets such as buildings, machinery, and equipment. Post fixed-asset transactions such as acquisitions, depreciation, write-downs,
- ✓ Appreciation, and disposal.
- ✓ Assign one or more depreciation books to define methods and conditions for calculating depreciation.
- ✓ Use depreciation books to meet managerial, internal accounting, and legal reporting requirements.
- ✓ Register maintenance costs, insurance coverage, and cost allocations for assets.

# Fixed Assets Allocations

Use allocation keys to distribute percentages of fixed asset transactions, such as acquisition cost and depreciation, to departments or projects

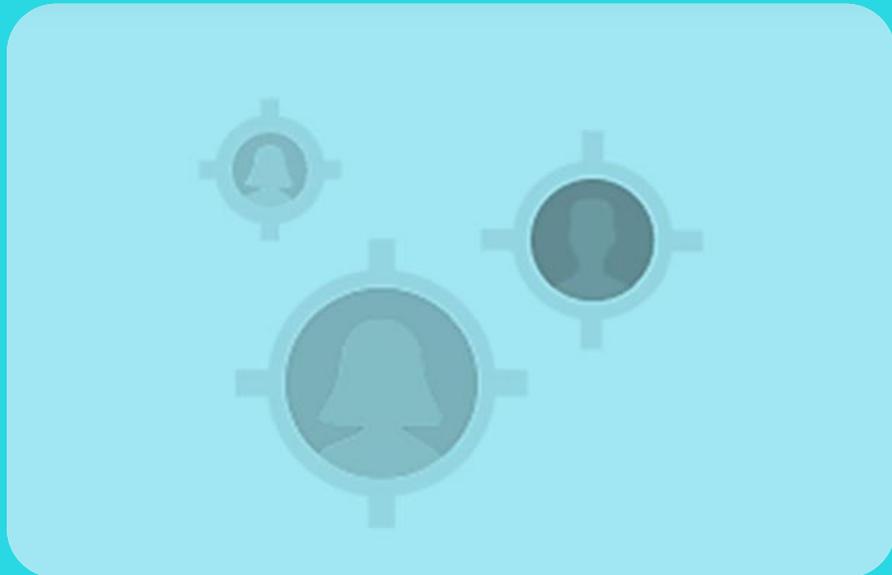


# Fixed Assets - Insurance

- ✓ Track insurance coverage and annual insurance premiums for fixed assets and easily determine whether they are under- or over-insured.
- ✓ Attach assets to one or more insurance policies and index insurance amounts.

# Fixed Assets - Maintenance

- ✓ Record maintenance and service expenses for fixed assets.
- ✓ Get detailed information to analyze and make decisions about fixed asset renewal and disposal.



# Cost Accounting

1

Get insight into costs through the visibility of actual and budgeted costs of operations, departments, products, and projects.

2

Combine base data in general ledger transactions with dimensions with known future costs and define a hierarchy of cost centers and cost objects.

3

Allocate costs using allocation runs with different allocation keys and methods.

4

Analyze general ledger actuals and budgets in user-defined scenarios. Explore the scenarios to gain insight into the business that is not immediately reflected in the chart of accounts.



# Deferrals

- ✓ Set up deferral templates that automate the process of deferring revenues and expenses based on a schedule.
- ✓ Recognize revenues and expenses in periods other than the period in which the transaction is posted.



# Cash Management

## Bank Account Management

- ✓ Create, operate, and manage multiple bank accounts to cater to diverse business needs and across different currencies.

## Electronic Payments and Direct Debits

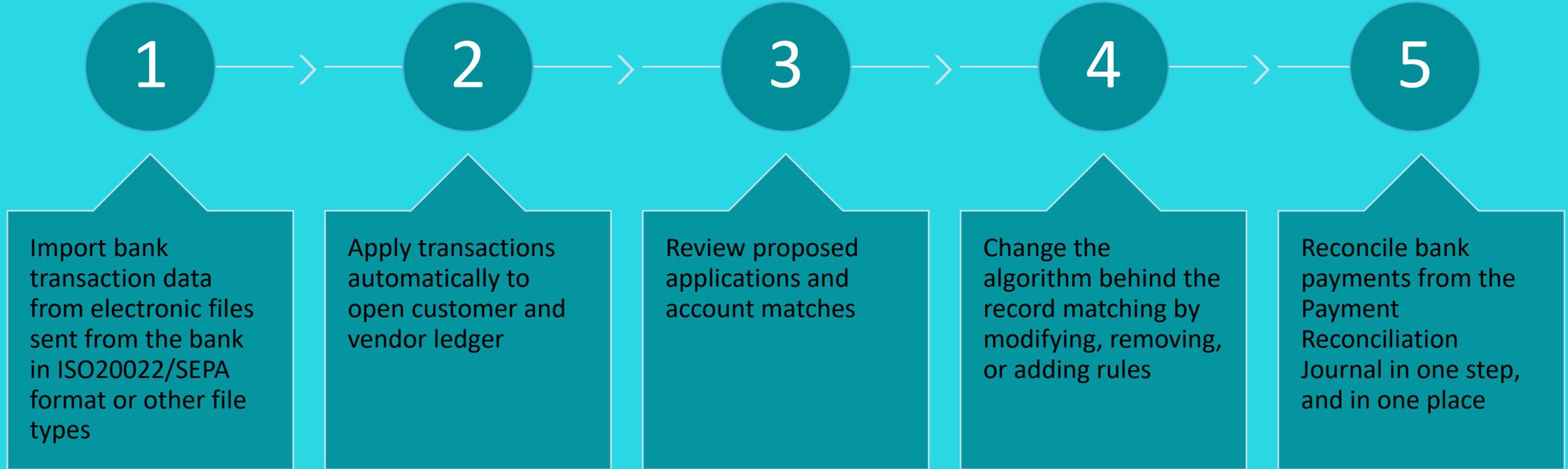
- ✓ Create payment proposals based on vendor documents and generate bank payment files in ISO20022/SEPA format or use the AMC Banking Service
- ✓ to generate electronic payment files in the format the banks require.
- ✓ Create direct debit collections for a bank direct debit file in the ISO20022/SEPA format.

## Easy Payment Process for your customers

- ✓ Give customers an efficient way to submit payments by adding links to online payment services to invoices in the online version of Business Central.
- ✓ Use the PayPal extension for access to a trustworthy global payment service that offers multiple ways to accept payments, including credit card processing and PayPal accounts.



# Reconciliation of Incoming and Outgoing Bank Transactions

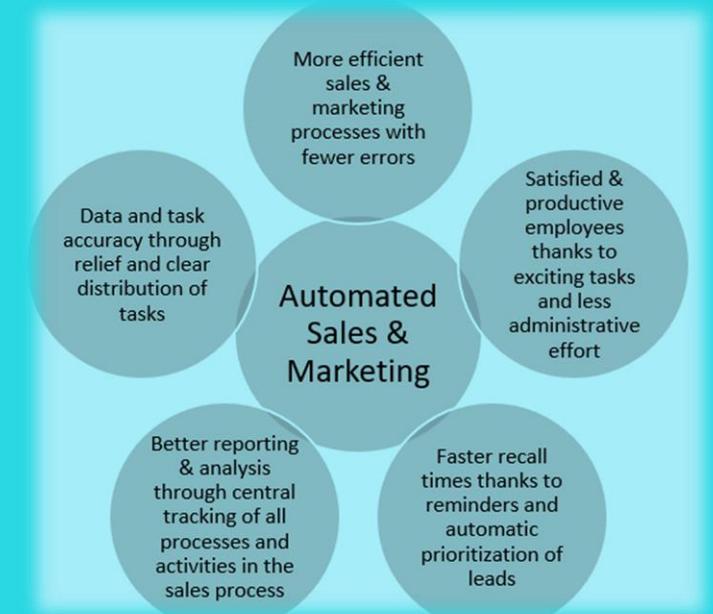
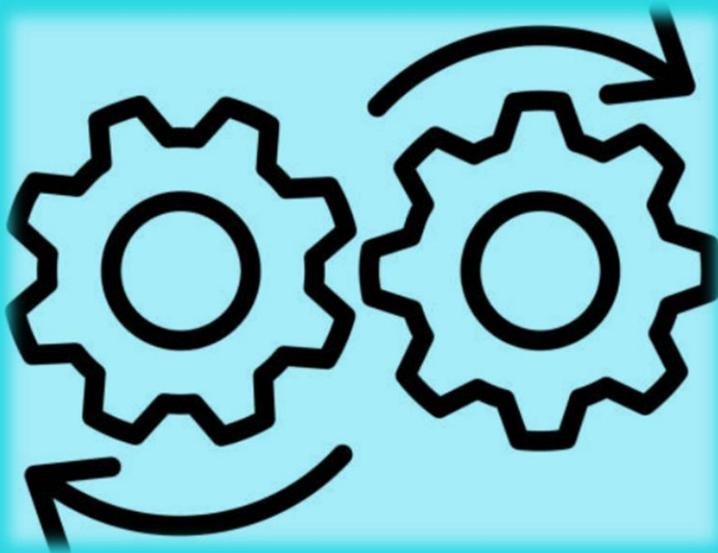


## Check Writing

- ✓ Print checks as automated electronic checks or to write them manual, both with flexible options for voiding, reprinting, using check forms with preprinted stubs, and testing before printing.
- ✓ Consolidate payments to a vendor in a single check.

# Sales and Marketing

- ✓ Can shorten the time from quote to cash by connecting sales and accounting
- ✓ Connect the dots between the sales and marketing teams and act quickly on sales-related enquiries right from Outlook
- ✓ Easily handle multiple ship-to and bill-to addresses per customer, including direct shipment and invoicing addresses.
- ✓ Align the content, data, and processes to deliver engaging customer experiences across all touchpoints, make smarter decisions, and drive business results
- ✓ Post sales right from Outlook, then send the invoices as PDF attachments that include a PayPal link to expedite payments
- ✓ Get a complete overview of interactions and track current customer status all the way from email to order to invoice
- ✓ Negotiate and keep track of special agreements with individual customers, including discount structures
- ✓ Prioritize leads based upon revenue potential and opportunities throughout the sales cycle



# Functionality includes:

- ✓ Campaign Management
- ✓ Contact Management
- ✓ Document Management and Generation
- ✓ Email Integration
- ✓ Mobile Sales
- ✓ Opportunity Management
- ✓ Sales Order and Process Management
- ✓ Tasks/Interaction Management

## Contact Management

- ✓ Record contact information for all business relationships, and specify the individual people related to each contact.
- ✓ Be alerted if you enter duplicate contact information.
- ✓ Get a precise view of prospects and customers by categorizing the contacts based on weighted profiling questions.
- ✓ Divide customers into ABC segments and even use this module for rating.
- ✓ Use the information to target contacts for campaigns.
- ✓ Issue quotes to prospects and create sales documents for specific contacts.



# Campaign Management

- ✓ Organize campaigns for segments of your contacts that define based on reusable criteria, such as sales, contact profiles, and interactions, and reuse existing segments.
- ✓ Send documents to people of different nationalities in their native language by using Campaign Management with Interaction /Document Management.

## Interaction and Document Management

- ✓ Record interactions that you have with your contacts, such as telephone calls, meetings, or letters, and attach documents such as Word, Excel, or TXT files.
- ✓ Automatically log other interactions, such as the sales orders and quotes that you exchange contacts, and revisit them if needed.



# Email Logging for Microsoft Exchange Server

- ✓ Log all inbound and outbound email messages sent through Business Central or Microsoft Outlook® Logging can be manual, or automated.
- ✓ Use a server-based solution with Microsoft Exchange Server to keep email messages in their natural environment and ease administration.



# Opportunity Management

- ✓ Keep track of sales opportunities.
- ✓ Section your sales processes into different stages to get an overview of and manage the sales opportunities.

## Microsoft Dynamics Sales integration

- ✓ Enabling integration between Business Central and Sales allows for a more efficient lead-to-cash process and enables users to make more informed decisions without switching products.
- ✓ Gain efficiency by ensuring tight integration between accounts and customers and adding cross-product features for the lead-to-cash flow.
- ✓ Use an assisted setup guide for help setting up the integration and coupling records in Business Central with corresponding records in Sales.
- ✓ Work with prices in currencies that differ from the local currency, using the coupling of the Customer Price Group record in Business Central with the Price List in Sales.



# Sales and Delivery

## Sales Invoicing

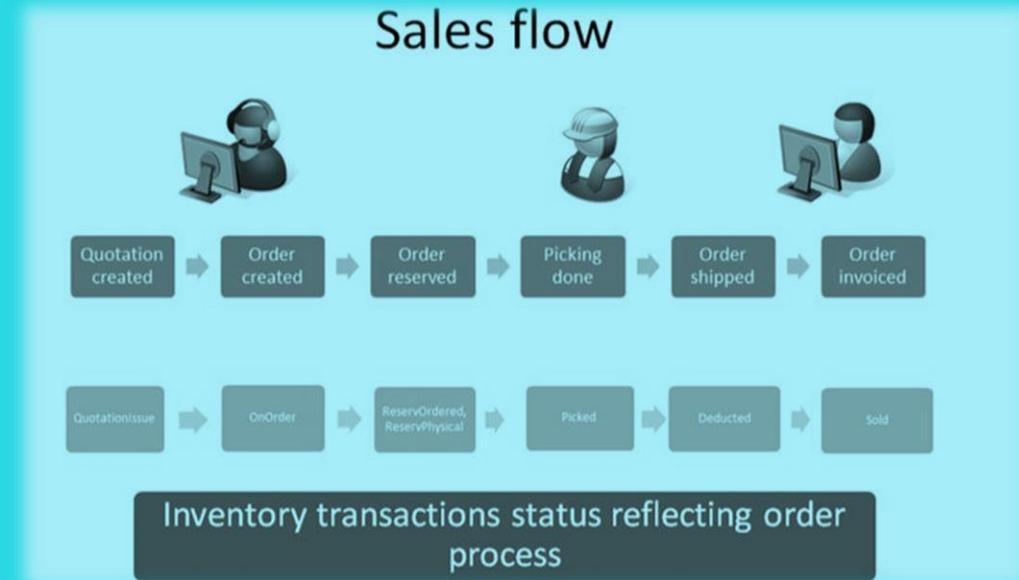
- ✓ Set up, post, and print customer invoices and sales credit memos.

## Sales Order Management

- ✓ Manage sales quotes, blanket sales orders, and sales order processes.
- ✓ Create partial shipments, ship and invoice separately, create prepayment invoices for the sales order and use quotes and blanket orders.

## Sales Line Pricing and Discounting

- ✓ Manage flexible item price and discount structures that differentiate between special agreements with customers and customer groups and are conditioned by parameters.
- ✓ Offer the lowest price on sales lines when the sales order meets the conditions you specify on for sales prices.
- ✓ Update the price agreements by using the sales price worksheet.

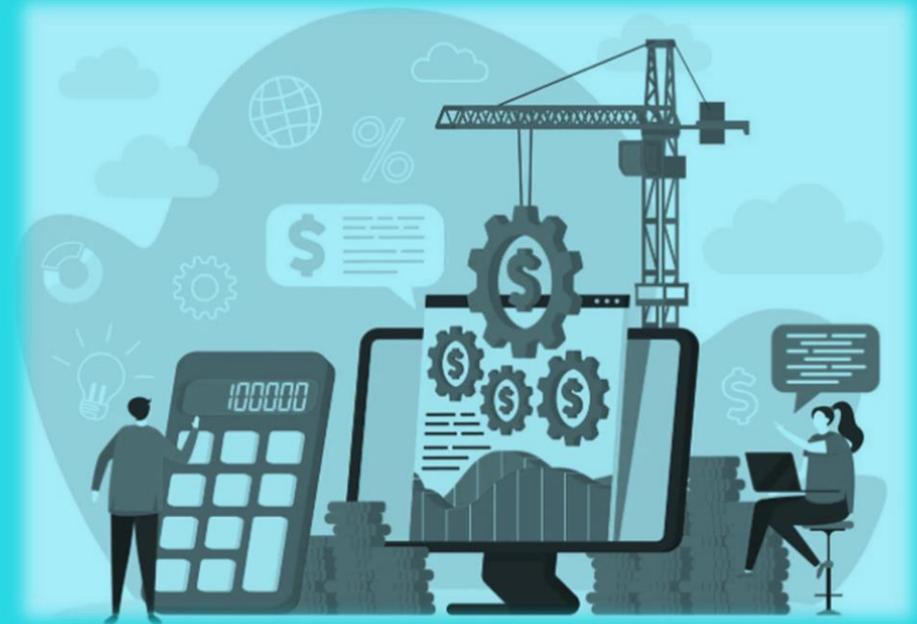


# Campaign Pricing

- ✓ Connect sales prices and sales line discounts to sales campaigns to give special pricing and discounts to customers and contacts in campaign segments.
- ✓ Specify periods for which prices are valid. Apply campaign pricing and discounts to sales and service orders.

## Sales Invoice Discounts

- ✓ Calculate invoice discounts automatically.
- ✓ Set up any number of invoice discount terms, including a certain minimum amount, discount percentage, and/or a service charge.
- ✓ The discount is calculated on the individual item lines and becomes part of the net sum of the invoice.
- ✓ Calculations can be done in both local and foreign currencies.



# Alternative Shipping Addresses

- ✓ Set up multiple ship-to addresses for customers who receive goods at more than one site.
- ✓ The person creating a sales order or invoice can specify exactly where to send it.



# Sales Return Order Management

- ✓ Create sales return orders to compensate customers who received incorrect or damaged items, receive return items for the orders, and link the orders to a replacement sales order

# Bulk Invoicing from Microsoft Bookings

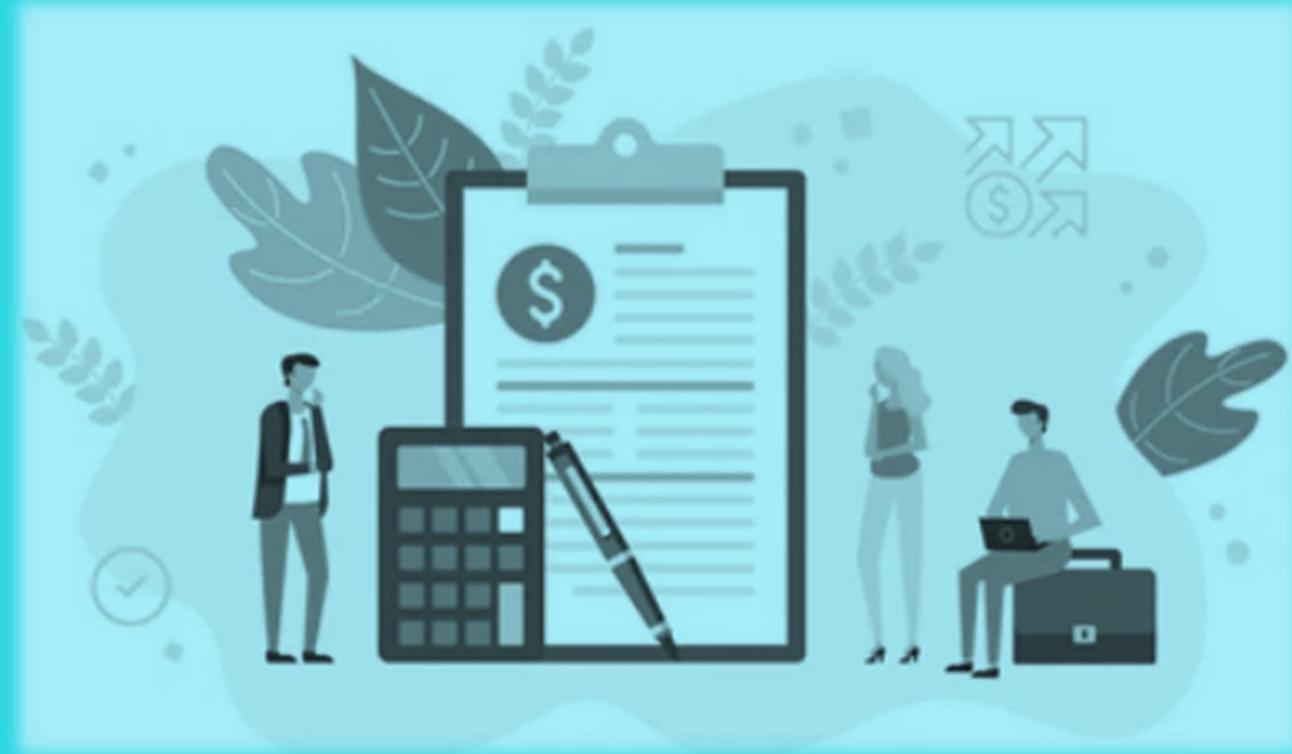
- ✓ Possible to do bulk invoicing for bookings.
- ✓ The Un-invoiced Bookings page in Microsoft
- ✓ Dynamics Business Central provides a list of the company's completed bookings.
- ✓ Quickly select the bookings you want to invoice and create draft invoices for the services provided.

# Purchase and Payable

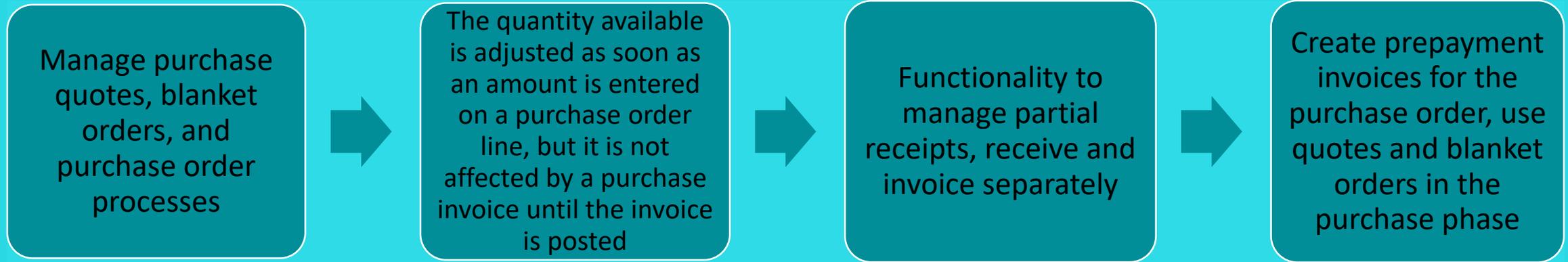
- ✓ Alert Management
- ✓ Catalogues
- ✓ Consignment Management
- ✓ Price/Discount Management
- ✓ PO Budget Control
- ✓ Requisitions-to-Invoice Management
- ✓ Retrospective Discount
- ✓ Returns Management

## Purchase Invoicing

- ✓ Set up, post, and print purchase invoices and purchase credit memos.



# Purchase Order Management



# Purchase Return Order Management

- ✓ Create a purchase return order in order to compensate the company for wrong or damaged items.
- ✓ Items can then be picked from the purchase return order.
- ✓ You can set up partial return shipments or combine return shipments in one credit memo and link purchase return orders with replacement purchase orders.



# Alternative Order Addresses

- ✓ Set up multiple addresses to manage orders from vendors that in addition to a main business address have more than one site from which they ship orders.
- ✓ Additional locations can then be selected by the purchasing agent when creating a purchase order or invoice.

## Purchase Invoice Discounts

- ✓ Calculate invoice discounts automatically.
- ✓ The discount can differ from vendor to vendor with different minimum amounts (also in different currencies) and different rates, depending on the size of the invoice.
- ✓ The discount is calculated on the individual item lines and becomes part of the net sum of the invoice.



# Purchase Line Discounting

- ✓ Manage multiple item purchase price discounts on such parameters as minimum quantity, unit of measure, currency, item variant and time period.
- ✓ The best, as based on the highest discount, unit cost is calculated for the purchase line when the order details meet the conditions specified in the purchase line discounts table.

## Alternative Vendors

- ✓ Manage purchase of the same item from different vendors
- ✓ Set up alternative vendors for items, specify typical lead times, and record price and discount agreements with each vendor

## Vendor Catalog Items

- ✓ Offer items to customers that are not part of regular inventory, but you can order from vendors or manufacturers on a one-off basis.
- ✓ Register these items as non-stock items but treat them like regular items



# Dynamics 365 development services

## 1. Dynamics 365 Business Central Consulting/Customization

- ✓ Extensively result-driven services help businesses transform various business operations
- ✓ Assist clients with Dynamics 365 implementation
- ✓ Successfully maintain quality customer services, enhance customer acquisition, conversion, and retention
- ✓ Customize the applications to deliver the best solutions
- ✓ Help different organizations to transform the business by earning profit and reducing costs
- ✓ Offer customization such as adding new fields, custom workflows, data collection and data processing
- ✓ Create and customization of schema features, metadata, business logic, design user-friendly dashboards, forms and views, notification templates, and optimization

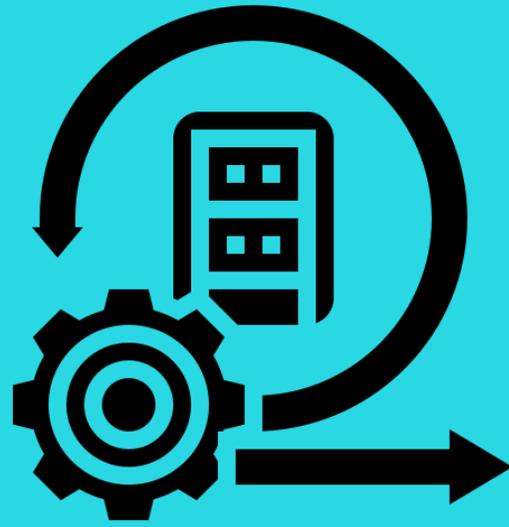


# Dynamics 365 development services

## 2. Dynamics 365 – Business Central Power Platform Development

For each module Dynamics 365, we offer:

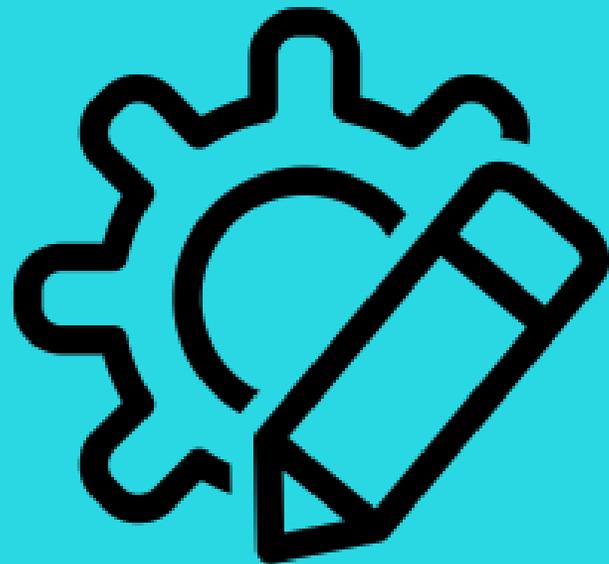
- ✓ Custom solution development via Power Apps, process automation/workflow management
- ✓ Turn ideas into organizational solutions by enabling everyone to build custom apps that solve business challenges by using Power Apps (Canvas & Model-Driven).
- ✓ Boost business productivity to get more done by giving everyone the ability to automate organizational processes by using **Power Automate**
- ✓ Dashboard-graphs implementation via **Power BI** & Make informed, confident business decisions by putting data-driven insights into everyone's hands.
- ✓ Easily build chatbots to engage conversationally with your customers and employees by developing intelligent chatbots via **Power Virtual Agents**.



# Dynamics 365 development services

## 3. Dynamics 365 Business Central Mobility Solutions

- ✓ Custom development for almost every type of computer device
- ✓ Advanced structural development service for different kinds of devices like:
  - ✓ Dynamics 365 for phones
  - ✓ Dynamics 365 for tablets
- ✓ Adopt Native App Development Approach for different devices
- ✓ Choose modern Front-end frameworks to make the solution compatible with every device operating with any modern operating system



# Dynamics 365 development services

## 4. Dynamics 365 Business Central Custom Integration



Helped several organizations to migrate data from CRM solution to Dynamics 365 CRM in a cost-effective manner.



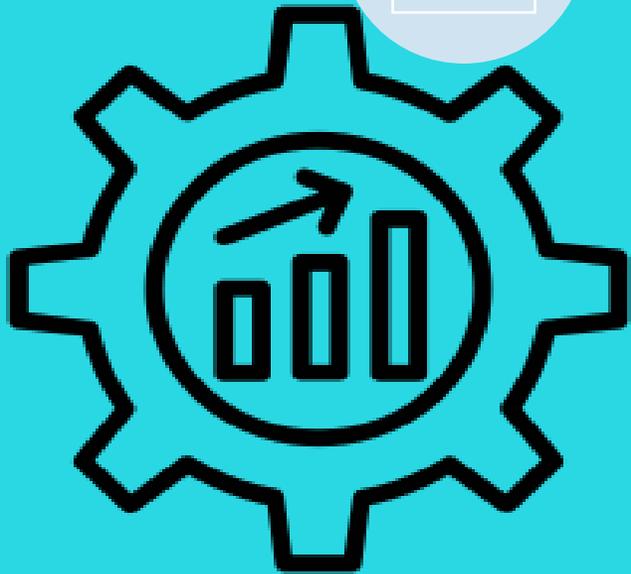
Incorporate the best practices and methodologies to map and move data from target CRM to Dynamics 365.



Integrates Dynamics 365 with third-party applications and ERP systems to fulfill the rising demands of businesses.



Streamline business analysis and integration for data syncing & data migration from 3<sup>rd</sup> party apps



# Dynamics 365 development services

## 5. Dynamics 365 Business Central support

- ✓ Technical, functional as well as production support for the implementation of Microsoft Dynamics 365 CRM.
- ✓ Post-implementation support service assistance.
- ✓ Assist clients in solving arising or reoccurring issues to ensure the smooth operation of the app.
- ✓ Great ROI – with Microsoft Dynamics support, 2managed services offerings represent a significant saving.
- ✓ In-depth assistance and consultancy across all CRM related requirements



# Dynamics 365 development services

## 6. Dynamics 365 Business Central user training

- ✓ Highly experienced in designing, developing, and delivering bespoke, client-branded, collaborative learning solutions for any Dynamics 365.
- ✓ Develop training programs for users of any module of D365 that reflect their way of working, incorporating the individual business processes and workflows for each role group.
- ✓ Training services include:
  - ✓ Training needs analysis (TNA)
  - ✓ Rapid Scope® – scoping your D365 training requirements
  - ✓ Development of bespoke deliverables including reference guides, quick cards, trainer packs, and three different eLearning options
  - ✓ Assistance with Skill the Trainer and Go-Live Support
  - ✓ Delivery in the form of classroom, presentation, eLearning, and various online solutions
  - ✓ Localization and translation services for global D365 rollouts



# Dynamics 365 development services

## 7. PowerApps Component Framework PCF for Dynamics 365 Business Central

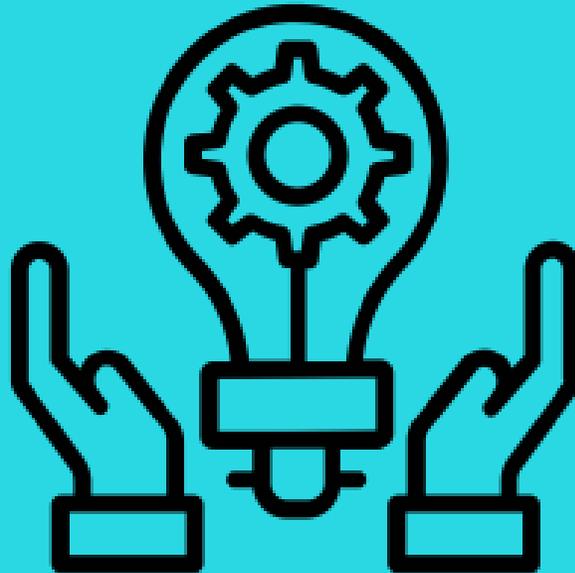
- ✓ Enhanced user experience for the users to work with data on forms, views, and dashboards
- ✓ Create code components that can be used across the full breadth of Power Apps capabilities
- ✓ Utilize the reusability of the code components
- ✓ Reuse these components many times across different tables
- ✓ Forms which provide support of modern web practices
- ✓ Reusability, Access to a rich set of framework APIs that expose capabilities like:
  - ✓ Component lifecycle management
  - ✓ Contextual data,
  - ✓ Metadata Seamless server access via Web API
  - ✓ Utility and data formatting methods;
  - ✓ Device features like camera, location, and microphone; and easy-to-invoke user experience elements like dialogs, lookups, and full-page rendering.



# Dynamics 365 development services

## 8. Opensource TypeScript Based Development for Dynamics 365 Business Central

- ✓ We provide the services of the execution of the custom functionality for each module of Dynamics 365
- ✓ Using TypeScript to streamline the custom business requirements of the clients
- ✓ Supported by the dynamics by default but provide a way of extension.
- ✓ While the execution of the TypeScript code, entities and form attributes are accessed, and actions can be performed:
  - ✓ Form context
  - ✓ XRM Web API,
  - ✓ Support of support HTML,
  - ✓ CSS,
  - ✓ JavaScript and TypeScript,
  - ✓ React.js,
  - ✓ Angular.js,
  - ✓ Vue.JS,
  - ✓ Ember.JS,



# Contact Us

- ✓ Dynamics 365 Business Central Consulting services of Cognitive Convergence offers strategic opportunities to clients, investors, and partners that is:
- ✓ Unique and industry defining
- ✓ Mutual interest centric business approach
- ✓ Significantly enhance company's footprint
- ✓ Turn grow revenues by entering new and exciting Technology Domains, App development ideas, Solution Development, and Joint venture projects
- ✓ 1st mover advantage with
  - Talent: 100%
  - Timing:100%
  - Technology: 100%
  - Technique: 100%



**THANK YOU**

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**For questions or queries contact us, we will be sure to get back to you as soon as possible.**