



# Beyond the basics

Making Microsoft Dynamics 365 for Finance and Operations, Business edition, your business management solution

# Introduction

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## Growth requires adaptation.

It's electric; you walk into your own office space and feel that jolt of energy—new employees bringing your vision to life, the hustle and grind that validates the effort you spent so long putting into this business. You're growing, thriving, bringing in new teams and new tools. You're determined to meet every challenge and keep your business trending in the right direction. But like any current, that electricity must be grounded.

**Growth needs a foundation to thrive.**





# Introduction

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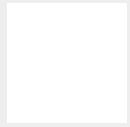
The processes, tools, and resources you've always relied on have to rise with you; they have to adapt to an influx in users, transactions, and data for that growth to continue. There's an understandable loyalty to the tools from those early days, but they can either work with you to advance your goals, **or they can create new challenges and slow you down.**

For an ambitious, growing company, microbusiness accounting solutions are a practical ally to keep your "Is" dotted and your "Ts" crossed—but they often struggle to keep pace alongside a thriving business.

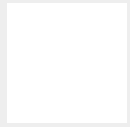
At some point along the way, every organization has to decide: do you keep doing what you've always done, or do you make a change?

When it comes to your accounting software, you have four options. **You can:**

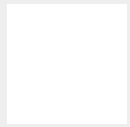
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Do nothing



Hire more people



Expand your existing tools



Find a new solution

# Making the right decision for you and your business hinges on your needs, goals, and relationships.

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What do you want to accomplish in the future? What do you need to make that happen? Do your partners align with those goals?

These questions and challenges are a routine part of any adaptation. Microsoft Dynamics 365 for Finance and Operations, Business edition offers a scalable and comprehensive accounting solution designed to help you reach your future ambitions.

**Discover how Dynamics 365 for Finance and Operations can help your business thrive.**

Need more information on how to evaluate your accounting and operations solutions? Get more information about how to find your ideal solution with our workbook,

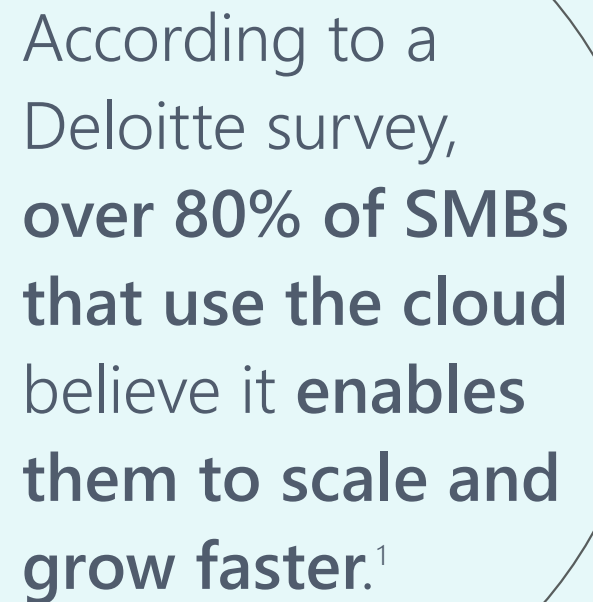
**Beyond the basics:  
How to find your ideal  
accounting solution.**

# A connected solution

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Dynamics 365 for Finance and Operations, Business edition offers you a single accounting solution that can streamline your daily tasks to save you time, money, and frustration.

Powered by the Microsoft cloud, this connected solution combines your financial, inventory, operations, and project management processes with your purchasing and sales tools to create a comprehensive experience.



According to a Deloitte survey, **over 80% of SMBs that use the cloud believe it enables them to scale and grow faster.**<sup>1</sup>

# Inside Dynamics 365 for Finance and Operations

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## Financial Management

- ▶ Account receivables/ payables
- ▶ Bank reconciliation
- ▶ Fixed asset management
- ▶ Month/year-end closing

## Inventory Management

- ▶ Forecasting
- ▶ Inventory control
- ▶ Shipment and distribution
- ▶ Returns and cancellations

## Project Management

- ▶ Capacity planning
- ▶ Budgets and estimates
- ▶ Job and process costing
- ▶ Resource management

# Inside Dynamics 365 for Finance and Operations

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## Purchasing

- ▶ Procurement
- ▶ Purchase line discounting
- ▶ Purchase order management
- ▶ Vendor management

## Sales

- ▶ Quote generation
- ▶ Contact management
- ▶ Sales invoicing
- ▶ Payment processing

“With Dynamics 365 for Finance and Operations, we no longer have to store data in separate systems that don’t work together—it’s all integrated.”

—**Kyle Johanson**, V.P., J-Systems, Inc., Lombard, Illinois



# Make better decisions

By connecting previously isolated business systems, you can get an end-to-end view of your organization.

Centralized information, real-time reporting, and visualized data in Power BI helps you better understand trends, like inventory status and cash flow, and make more informed decisions about the future of your organization.

**Business Manager**  
CRONUS US

**Activities**

Ongoing Sales

Quotes	2	Orders	4	Invoices	7	Sales This Month	\$1,906
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Start

Sales Quote	Sales Order	Sales Invoice	Purchase Invoice	Replay Getting Started
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**Favorite Accounts**

Account No.	Name	Balance
10100	Checking account	1,638.40
10200	Saving account	0.00
10300	Petty Cash	98,030.23

**Business Assistance**

Top Five Customers by Sales Value

**Trial Balance**

Description	03/01/16..03/31/16	04/01/16..04/30/16
Total Revenue	57,320.45	1,906.40
Total Cost	45,138.70	1,485.40
Gross Margin	12,181.75	421.00

# Make better decisions

This integration empowers you and your team to respond to customer needs quickly, optimize your everyday operations, and share data regardless of your device or location.

A unified solution not only makes accessing this data easier, but it helps keep your reports, analytics, and insights accurate and relevant so your team can take a smarter approach to strategy and execution.

**Business Manager**  
CRONUS US

**Activities**

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**Start**

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**Business Assistance**

**Top Five Customers by Sales Value**

Litware, Inc.	Coho Winery	Retecloud	Alpine Ski House	Trey Research	All Other Customers
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# Grow at your own pace

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With Dynamics 365 for Finance and Operations, you only use what you need when you need it.

Flexible licensing plans, adaptable business apps and a scalable database mean you can better manage your growth by adding additional users as the need arrives. Based on a per user, per month structure, you can start your service small and adapt your solution as you expand your business.





# Automate and secure your processes

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Dynamics 365 for Finance and Operations equips your team with secure automation tools that make ordering, selling, invoicing, and reporting easier and faster.

In other words, you can focus on what you do best while easing the burden of monitoring, maintaining, and managing regular tasks.

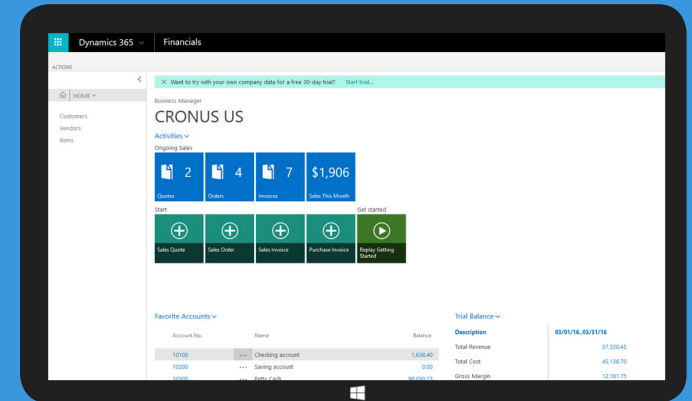


# Fast from the start

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Intuitive migration tools within Dynamics 365 for Finance and Operations make transferring your internal data quick and easy.

Essential tasks like quoting customers and managing your cash flow won't be disrupted. With Dynamics 365 for Finance and Operations' integration into the Office suite, your colleagues can leverage the familiar interface as the Office tools, like Outlook, Word, and Excel, helping to eliminate extensive training required on new platforms, and driving quicker adoption for employees.



“We were operational in a few hours with full access from anywhere at a very affordable cost.”

—**Kim Hulke**, Accounting Manager, Sanchez Imports, Chula Vista, CA

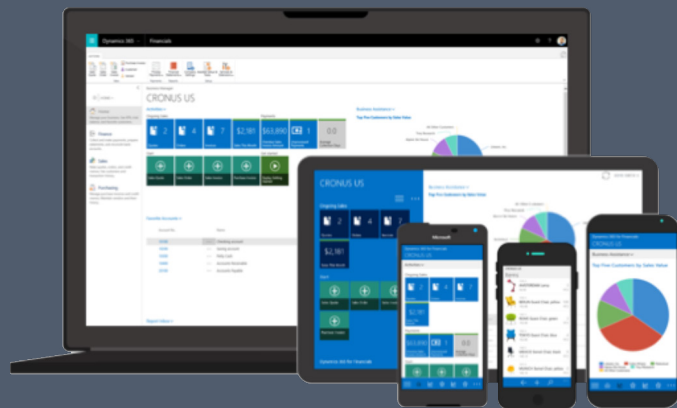


# Work where business takes you

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A cloud-driven business management solution empowers you to get work done from nearly anywhere.

Access your essential data and business tools regardless of your location or device with a shared cross-platform experience that won't compromise data security.



With Dynamics 365 for Finance and Operations, your organization can benefit directly from Microsoft's security investment to protect your data and individuals.

# Try Dynamics 365 for Finance and Operations for yourself

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Upgrade your accounting software from the dining room table to the cloud, and be the hero of your accounting team.

**Start your free 30 day trial,** or schedule a personalized demo today.

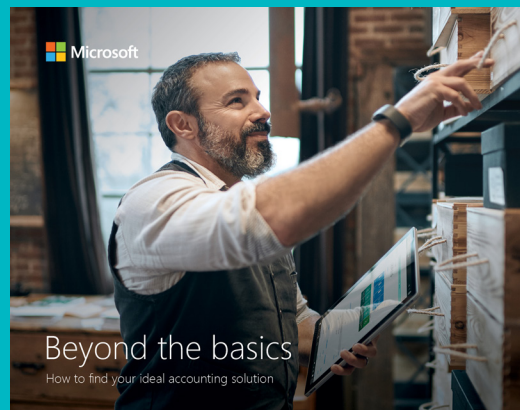
[Learn more](#)

## Moving beyond the basics? You may also be interested in:



**Beyond the basics:**  
How the right accounting solution can help achieve your goals

[Download](#)



**Beyond the basics:**  
How to find your ideal accounting solution

[Download](#)



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