NAV

Microsoft
Dynamics

When to Consider a Move to Microsoft Dynamics NAV

Prepared for:

Clients of Synergy Business Solutions
that are Using Microsoft Dynamics SL

Synergy Business Solutions

Financials, Projects, Distribution, and Manufacturing Made Easier

www.synergybusiness.com

Why Synergy Added Dynamics NAV to Its Portfolio

A Microsoft Gold ERP Partner since 2003 with over 300 clients nationwide, Synergy Business Solutions has primarily sold, implemented, and supported Microsoft Dynamics SL, a flagship on-premise solution for project-based and/or distribution companies.

In 2017, Synergy added two additional Microsoft products to its portfolio, Dynamics NAV and Dynamics 365, with both products having impressive long-term roadmaps outlined by Microsoft.

Microsoft Dynamics NAV, formerly Navision, is an enterprise resource planning (ERP) system particularly suited for the distribution and manufacturing markets among small-to-mid-size organizations. It's aimed at companies who need trade functionality with supply chain management, inventory, and warehousing. NAV also has a Project Management series with basic job costing. Moreover, it has a modern interface and phenomenal reporting and dashboards capability.

Dynamics 365 is a lower-range cloud-based solution developed on the foundation of Dynamics NAV.

What gives Dynamics NAV its power is its long history of manufacturing, distribution, and supply chain capabilities, a huge install base of 110,000 organizations, and the resources Microsoft is putting into it for upgrades, Office 365 integration, and cloud technology.

By Spring 2018, Dynamics NAV will have a cloud-based version with all of its current functionality that is found in the on-premise version. This is the reason Synergy became a Dynamics NAV partner—to take advantage of Microsoft's "next generation of business intelligence in the cloud" in service to our clients.

Already Synergy has become a sought-after Dynamics NAV partner for training clients in NAV. Our consultants have been trained in the last year to apply their Dynamics SL expertise to Dynamics NAV.

When Dynamics SL Users Should Consider Dynamics NAV

Synergy clients with the following characteristics are good candidates to consider Dynamics NAV as their next ERP system should their business requirements change in relation to Dynamics SL. Companies having:

- **A desire or mandate to move to a true cloud product** and multi-tenant SaaS model to minimize the need for in-house IT software support and eliminate disruptive upgrades.
- **Distribution, manufacturing,** inventory, warehousing, and/or supply chain management needs.
- **No government contracting requirements** for tracking Indirect Rates Management, unallowable. expenses, submitting ICS reports, etc.*
- **No complex project accounting** needs.*
- Only needs a solution to track **projects on an elementary level**, if any.

*As of March 2018, Dynamics NAV does not have full functionality to meet the requirements of government or DCAA compliance or for complex project accounting/job costing. However, the add-on product called Progressus that integrates with Dynamics NAV, has a roadmap to meet these requirements sometime in late 2018 or early 2019.

Capabilities and Benefits of Dynamics NAV

Here are the major capabilities of Dynamics NAV and some benefits you will get in making the move:

- Dynamics NAV is known for its strong **Manufacturing Series** to meet needs of discrete or make-to-order manufacturers.
- Dynamics NAV has powerful **Inventory Management** to meet the need for accurate inventory data.
- NAV has strong **Distribution** capabilities through its **Supply Chain** modules.
- Its **Warehouse Management** enables warehouse automation.
- It has a variety of Purchase and Payables functionality that meets the need for Order Management.
- Like Dynamics SL, its **Core Financials** are robust.
- You can get powerful **Business Intelligence** through various reporting and dashboard tools.
- NAV has **Project Management** modules to meet basic project cost accounting needs.
- An independent research firm, Nucleus Research, gives **Dynamics NAV high marks** for an impressive ROI, improving productivity (up 20%), increasing visibility, driving higher margins, cutting shipping costs, and boosting business growth.
- Full capabilities descriptions are found in the latest Microsoft **Dynamics NAV Capabilities Guide.**
- Synergy Dynamics SL clients **get credit from your SL investment** toward the cost of Dynamics NAV.
- **Minimize your dependence on internal IT** by implementing the true cloud version of Dynamics NAV.
- NAV has incredible **integration capabilities with Office 365** that increase productivity.
- You will continue with **the same Microsoft Dynamics partner that you know and trust.**

Strategic Partnership to Ensure Dynamics NAV Success

Although Synergy has well over 100 successful implementations under our belt, they are primarily Dynamics SL. To ensure success for our Dynamics NAV clients, Synergy combines our Dynamics ERP expertise in general with the expertise of another Dynamics NAV partner.

- Synergy has an Implementation & Development partnership for Dynamics NAV with Velosio, an award-winning Microsoft Dynamics NAV Partner that achieved Microsoft Dynamics Inner Circle in 2017 & 2018.

Synergy's Implementation Methodology

Synergy has the following Implementation Methodology built on its years of experience implementing financial management, project accounting, manufacturing and distribution processes, and ERP projects.

1. **Needs Analysis** – Prior to implementation, Synergy will conduct a detailed requirements analysis.

2. **Prove-Before-You-Purchase Prototype** – When appropriate, Synergy will build a Prototype after the Needs Analysis, using the client's data, to prove the system performs the major requirements before the client buys software and commits to an implementation.

3. **Project Planning** – Synergy uses proven PMI Project Management to plan phases of the implementation project to chart a course for a successful implementation from beginning to end.

4. **Documentation** - The proper documentation of organizational and system procedures as to how data is to be entered and processed through the system.

5. **Configuration** - Each module is setup and configured to your business process as defined in the Project Planning Phase.

6. **Integration** - Integrate your financial and business system with other software applications within your current business process framework and other third-party software purchased.

7. **Data Conversion** - We have the expertise to convert your current data to the format required.

8. **Training** - Our certified and experienced Dynamics NAV consultants will provide the necessary know how to instruct you in how to properly use the software in your day-to-day operations.

9. **Go Live** – Once you are ready to go live with a particular phase of your software, Synergy will have staff deployed on-site as necessary, to make sure the transition is smooth, and that all the users are comfortable using the new system.

10. **Ongoing Support** - We will jointly review the success of the project, any outstanding issues and any additional requests to make sure you are pleased and have received value with the investment that you've made. Synergy offers a variety of on-going support plans to help keep you running at peak.

Synergy Expertise & Certifications

Synergy Business Solutions makes a substantial investment in the training and certification of our consulting staff. To ensure your success, Synergy consultants are certified implementers and Microsoft Certified Professionals. Synergy's Expertise & Certifications from Microsoft, Dynamics NAV, Dynamics SL, and other sources include:

- Microsoft Gold Enterprise Resource Planning (ERP) Partner
- Microsoft Certified Solution Professionals (MCP)
- Certified Master Dynamics Application Professionals
- Certified Dynamics Manufacturing Professionals
- Certified Dynamics Project Management and Accounting Professionals (Job Costing)
- Certified Dynamics Distribution Professionals
- Certified Dynamics Inventory and Order Processing Professionals
- Certified Dynamics Installation and Configuration Professionals
- Certified Dynamics Financials Professionals
- Certified Dynamics Financial Integration Professionals
- Certified Dynamics Payroll Professionals
- Certified Dynamics Reporting Professionals
- Certified Dynamics Crystal Report Writer Professionals
- Certified Dynamics Customization Manager Professionals
- Certified MBS SQL Server Foundation Professionals
- Certified Microsoft Sales & Industry Professionals
- Certified Public Accountants (CPA)
- Certified Management Accountants (CMA)

Synergy consultants are trained in Dynamics NAV, transfer their expertise in Dynamics SL to Dynamics NAV implementations, and utilize our strategic Dynamics NAV partner, Velosio, when necessary.

How Synergy Stands Out from Other Partners

1. Our clients rave about our client support and training:

- *"In all my years, I've never seen such quality customer service and support as I've seen with Synergy... They understand. They walk the talk."* – Christine Finkbeiner, Senior Accountant, Computerized Facility Integration

- *"Synergy has been outstanding... They are knowledgeable and timely. By far the best software company I have worked with in my 25 years."* – Dan Jones, Finance Director, Esys Automation, manufacturer

- *"We would not be as successful as we are today without Dynamics SL and Synergy. The support that the Synergy staff provides to GP&A is indispensable. Service is very quick and they are very responsive."* – Robin Smyth, Owner, Gillespie, Prudhon & Associates

- *"It is a pleasure doing business with a firm that cares!"* – Wendy Randolph, Controller, CHR Solutions

- *"Since our 'go live,' Synergy support is always there, remotely or onsite, to guide us and resolve matters."* – Misha Goloborodko, Assistant Controller, NuScale Power

- *"Your consultants are great! I haven't seen a company with such efficient and attentive client service."* – Inal Tshovrebov, IT Manager, Committee for Children
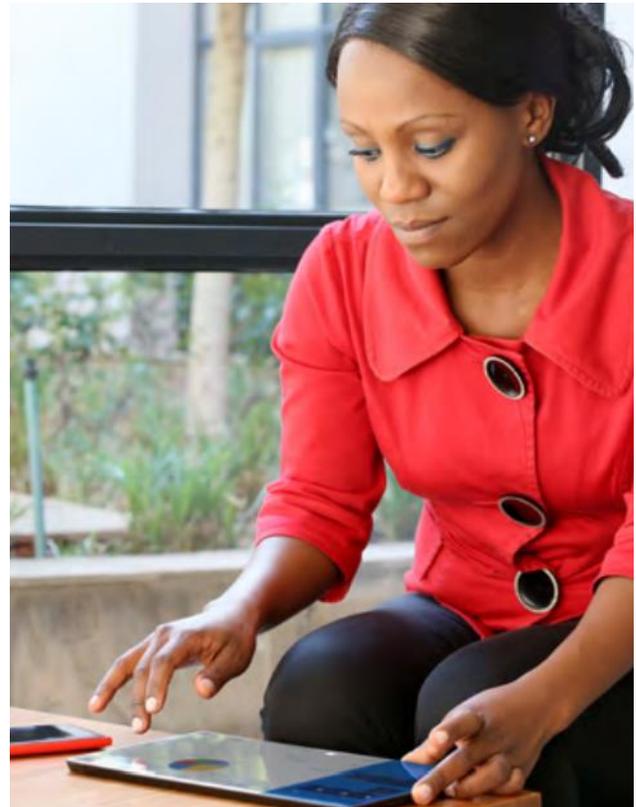
2. Our clients rave about our implementation services, including core financials, manufacturing, distribution, inventory, reporting, project accounting, etc.:

- *"Synergy helped us zero in on a comprehensive solution, which tied together financial and project accounting and materials management. The solution has helped us increase productivity, efficiency, and our output every single day."* – Ryan Penrose, IT Manager, SAFE Boats Int'l, MTO manufacturer

- **_"Choosing the right implementation partner was just as critical as a new ERP system._** _Synergy made the process virtually painless and quicker than expected. They configured a system that met the requirements of both our small and large projects and vastly improved our project management and ability to keep projects on budget."_
  – Daniel Thompson, Chief Operating Officer, The Production Network

- _"I've been through several implementations and it's unusual to make 'go live' dates. Synergy made the difference solving any challenges that arose and getting us live, both on time and within budget of the original scope."_ – Michele Gargaro, Controller, TDA Research

- _"The solution Synergy implemented makes us more effective and efficient. I get my reports in half the time with half the staff!"_ – Alton Cherry, President / CEO, Hydro Resources

- _"The real challenge is finding a partner that is knowledgeable and can deliver the things we need delivered and Synergy did do that for us."_ – Mike Hansen, IT Director, Productions Plus

- _Synergy empowers us. They took the time to understand our challenges and used their expertise to help us optimize our processes and workflow."_ – Kevin Sullivan, former VP, Kurion

- _Synergy is incredible. They treated us as if we were their number-one client and helped me perform a "triage" on a deficient installation that both of us inherited."_
  – Richard Frankhauser, Former Controller, Pulver Dryer

How to Engage Synergy to Explore Dynamics NAV

You can enter into an evaluation process with Synergy's Dynamics NAV consultants and system architects through the following:

1. **Discovery** – A Synergy Dynamics NAV consultant interviews your stakeholders to determine your latest financial, business, manufacturing, distribution, inventory, supply chain, warehousing, order management, reporting, dashboards, integrations, and/or remote access needs and preferences in software.

2. **Preliminary Pricing** – Synergy will provide you with a preliminary cost estimate for a migration project that will reflect your credit from Microsoft and our implementation services.

3. **Demo** – Synergy will present an overview Demo on how Dynamics NAV (and possibly other third-party add-ons) solve the issues you have outlined in Discovery.

4. **Prove-Before-You-Purchase Prototype** – Through a paid engagement, Synergy builds a Prototype of your new system that will ensure Dynamics NAV solves all of your major challenges and requirements before you purchase the software—which will be discounted due to a Microsoft credit—and before you commit to an implementation.

5. **Implementation** – The Prototype becomes the starting point for implementation, and assuming your project moves forward, there is no extra overall cost to you added to the implementation services.

6. **Support** – Receive the same high-quality support you did with Dynamics SL from our Dynamics NAV team.

Contact Your Account Manager to Learn More:

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