INTEGRATO
technology made simple

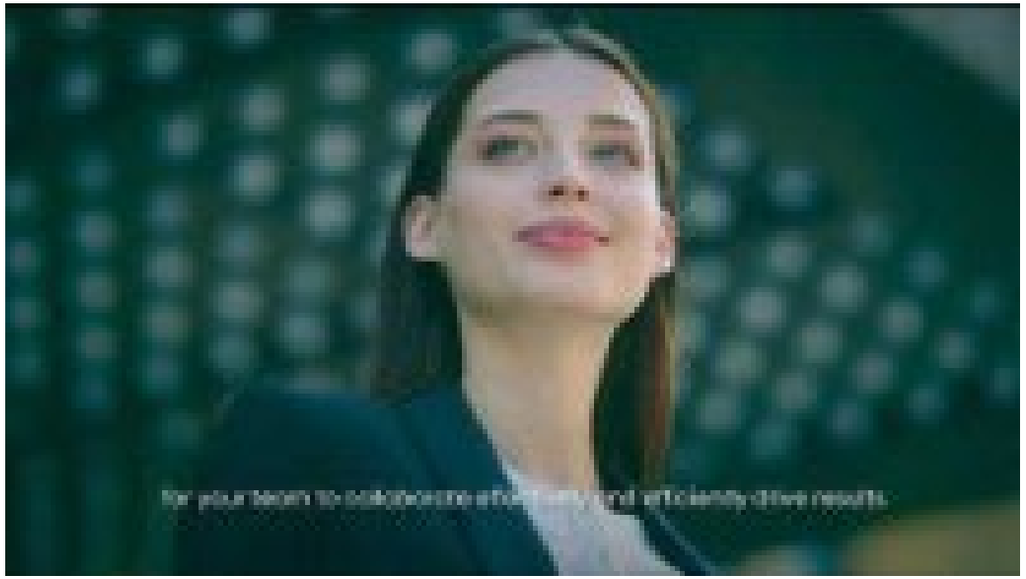
Microsoft Dynamics 365 Business Central

Assessment

Who We Are

Integrato is a **Gold Direct Microsoft Partner and Cloud Solutions Provider** implementing and integrating with Microsoft Dynamics 365 Business Central, Microsoft 365, Power Platform, and Azure. With founders that have over 20 years of accounting and consulting experience, Integrato is uniquely positioned to help you find technology solutions that connects your entire business with the accounting team's needs.

We work closely with your team to deliver implementations and integrations customized to your business needs while prioritizing timeline and budgets.



technology made simple.

What We Do

What is Integrato? Literally translated, it means “integrated” in Italian or “integral” in Spanish. Two words that are directly related to our core focus.

Our goal is to help make technology simple for your team to collaborate effectively and efficiently drive results. **We help connect your people, process, and technology.**

Our team, which includes CPA’s experienced with accounting services, business planning, operations and technology assist with:

- Selecting the optimal technology solution that will best support the scope and growth of your business.
- Implementing the enterprise resource planning (ERP) and customer relationship management (CRM) technology solution to deliver maximum benefits to your organization, fast.
- Retrieving, converting and updating your data to ensure accuracy. Integrating the flow of realtime information – across multiple services –for real-time decision-making.
- Hands-on training to develop skills and knowledge-share to eliminate unnecessary downtime.
- Provide you knowledgeable, flexible and responsive support on site, via telephone or the web

Implementation | Customization & Integration | Upgrade & Migration | Consulting | Training & Support

Assessment Deliverables

- We'll schedule an **Information Gathering Virtual Meeting** with you for a better understanding of your current company setups and goals out of your next ERP.
- During the call we'll discuss your desired next steps which can include
  - Business Central Demo (if applicable)
  - Migration Overview including an estimated implementation and support plan (if applicable)

Are you outgrowing your accounting system?

Microsoft Dynamics 365 Business Central

Connect your business

Make smarter decisions

Start and grow easily

"With Dynamics 365 Business Central we no longer have to store data in separate systems that don't work together – it's all integrated."

Kyle Johanson
VP, J-Systems, Inc.

Connect your business

Deploy a single, comprehensive solution

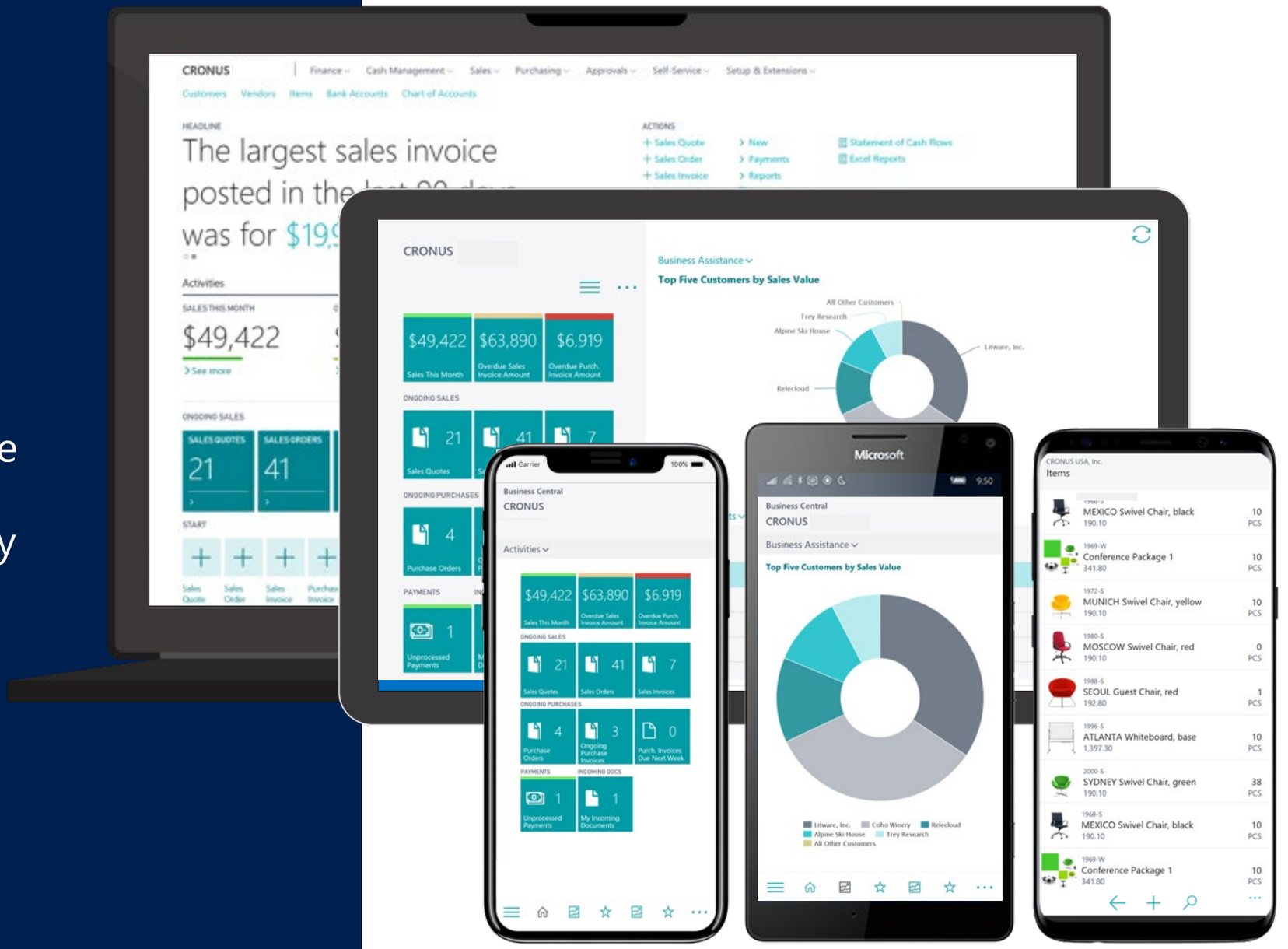
Automatically pull systems and processes together to manage financials, sales, service, and operations.

Connect with 3rd party applications like payroll, banking, CRM, or industry-specific systems.

Work where your business takes you

Desktop, laptop, tablet, or phone you get the same powerful capabilities and rich functionality

Get one experience that's consistent and secure across Windows, iOS, and Android.

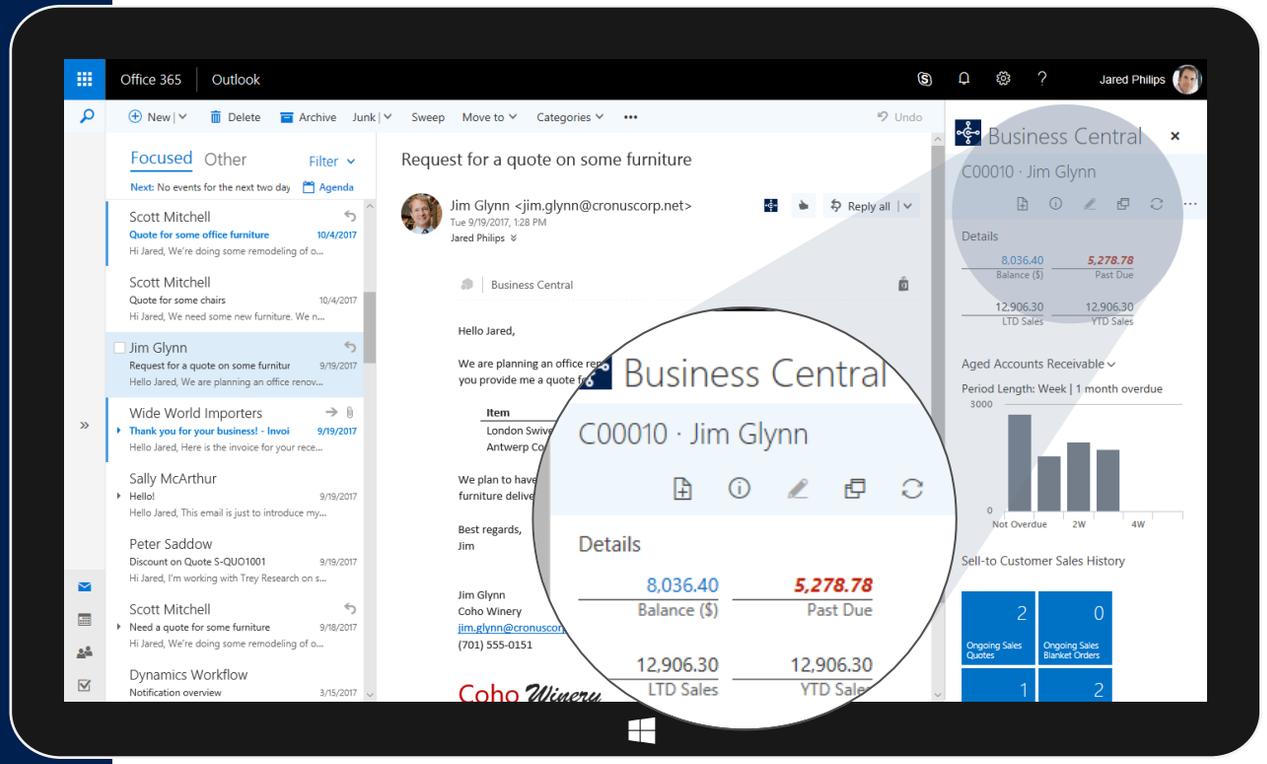


Manage quote to cash, all within Outlook

Create quotes, process orders, and submit invoices without leaving Outlook.

Access live data directly from Microsoft Excel to update items, sales orders, and purchase orders.

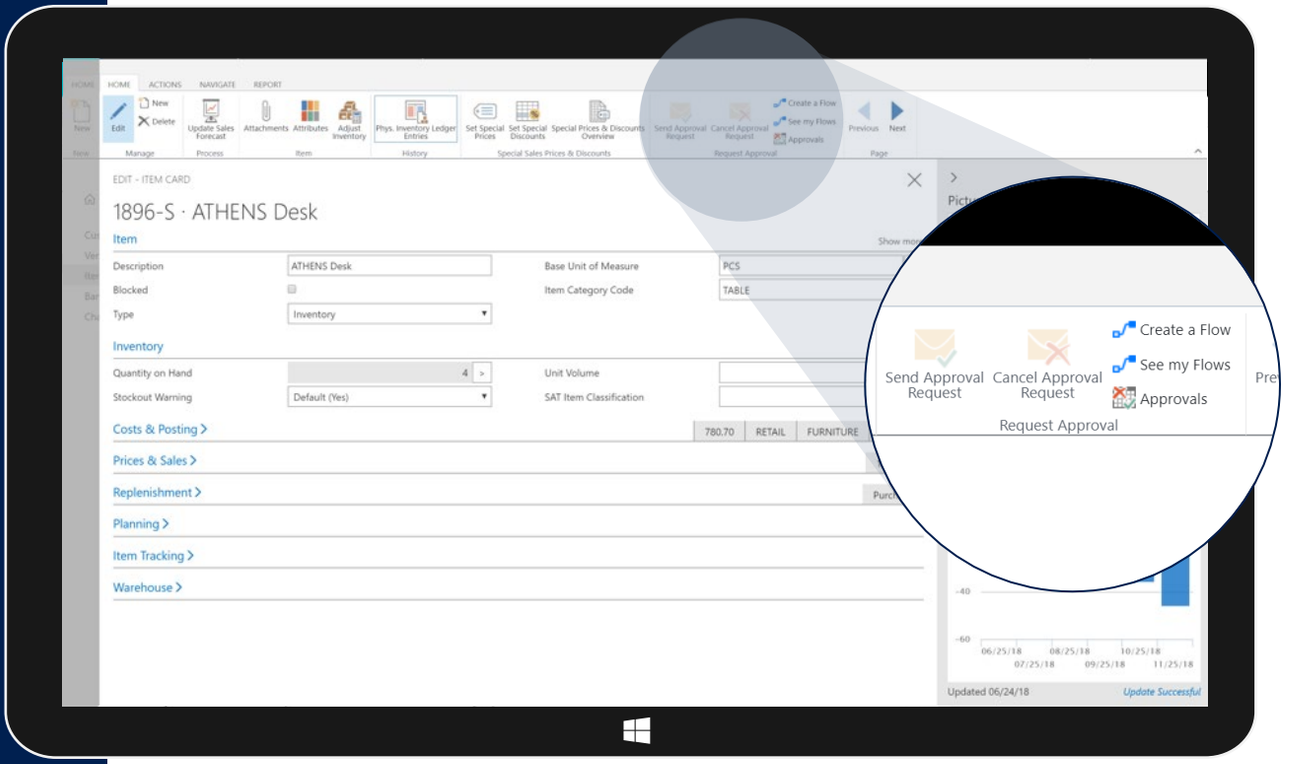
Customize outgoing documents such as quotes and invoices in Microsoft Word.



Automate and secure business processes

Streamline business processes with easy-to-create workflows. Track cash flow and secure purchasing, credit authorization, and vendor payment processes.

Ensure compliance with audit trails and enterprise-level security.



Dynamics 365
Business Central
CRONUS USA, Inc.
Finance
Cash Management
Sales
Purchasing
Approvals
Self-Service
Customers
Vendors
Items
Bank Accounts
Chart of Accounts
Business Assistance
Aged Inventory | View by Month
0..30 days
30..60 days
60..90 days
90..120 days
Over 120 days
Top Five Customers by Sales Value
All Other Customers
Trey Research
Alpine Ski House
Litware, Inc.
Relecloud
Coho Winery
Sales Pipeline
Sales Cycle: EXISTING
Initial
Presentation
Proposal
Sign Contract
Cash Flow Forecast
DEFAULT | Combined | First Entry Date | Month | Account No.
JOB
LIQUID FUNDS
PAYABLES
PURCHASE ORDERS
RECEIVABLES
SALES ORDERS
TAX
Total
Apr 2018
May 2018
Jun 2018
Make Smarter Decisions

Get an end-to-end view of your business

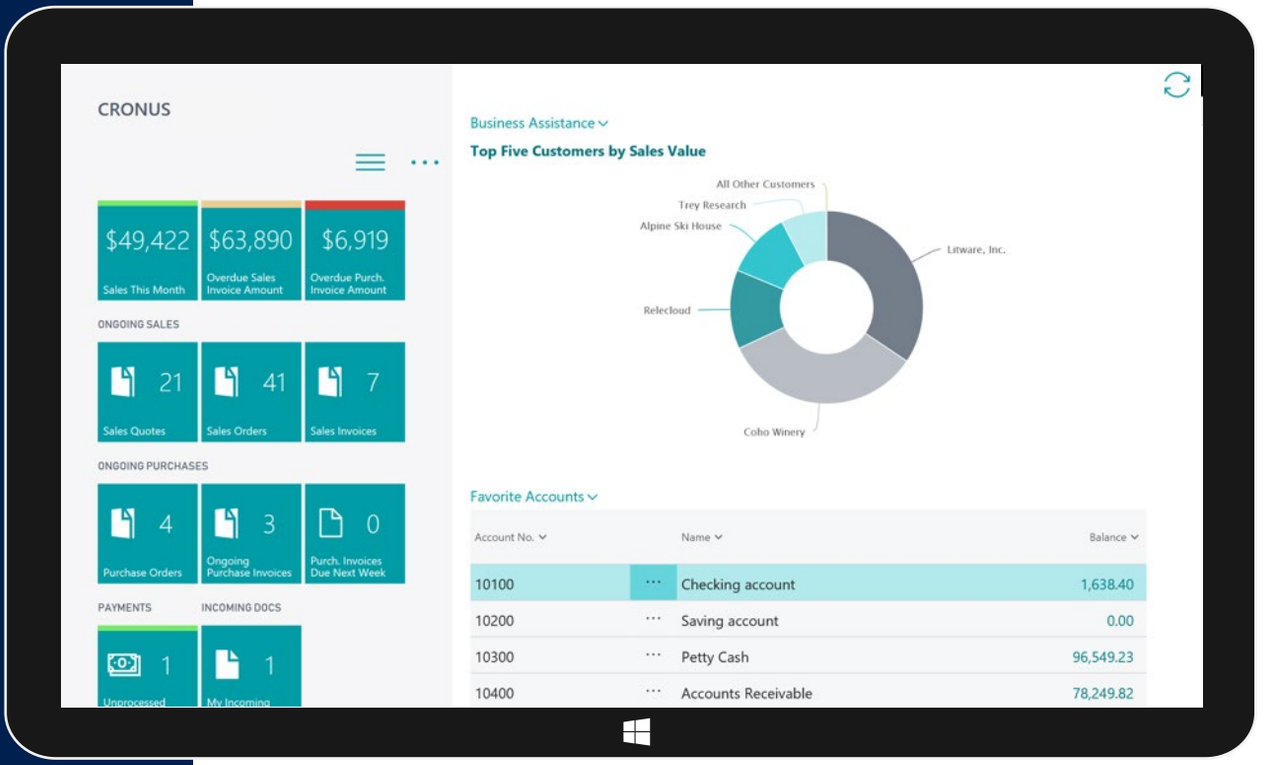
Centralize data from finance, sales, service and operations to get an accurate view of your business.

Real-time data updates help you spot trends, prevent issues, and deliver great customer experiences.

Sell smarter and improve customer service

Focus on the right opportunities and track ongoing sales performance using custom dashboards and multidimensional reports.

Gain a comprehensive overview of service tasks, workloads, and employee skills to effectively assign resources, accelerate case resolution and better serv. customers.

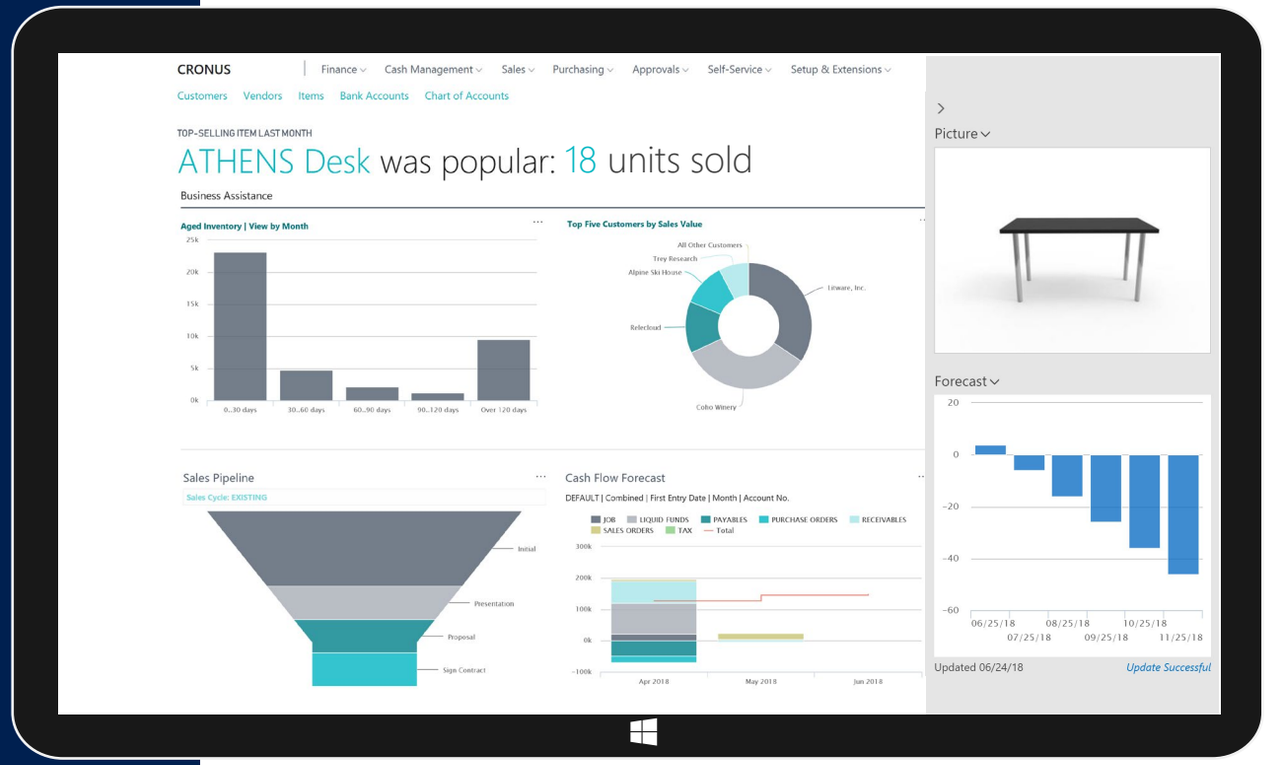


Guide employees to optimal outcomes

Predict when and what to replenish with built-in intelligence, sales forecasts and dynamically updated inventory levels.

Get recommendations on when to pay vendors to use vendor discounts or avoid overdue penalties.

Manage budgets and monitor progress with real-time data on available resources.

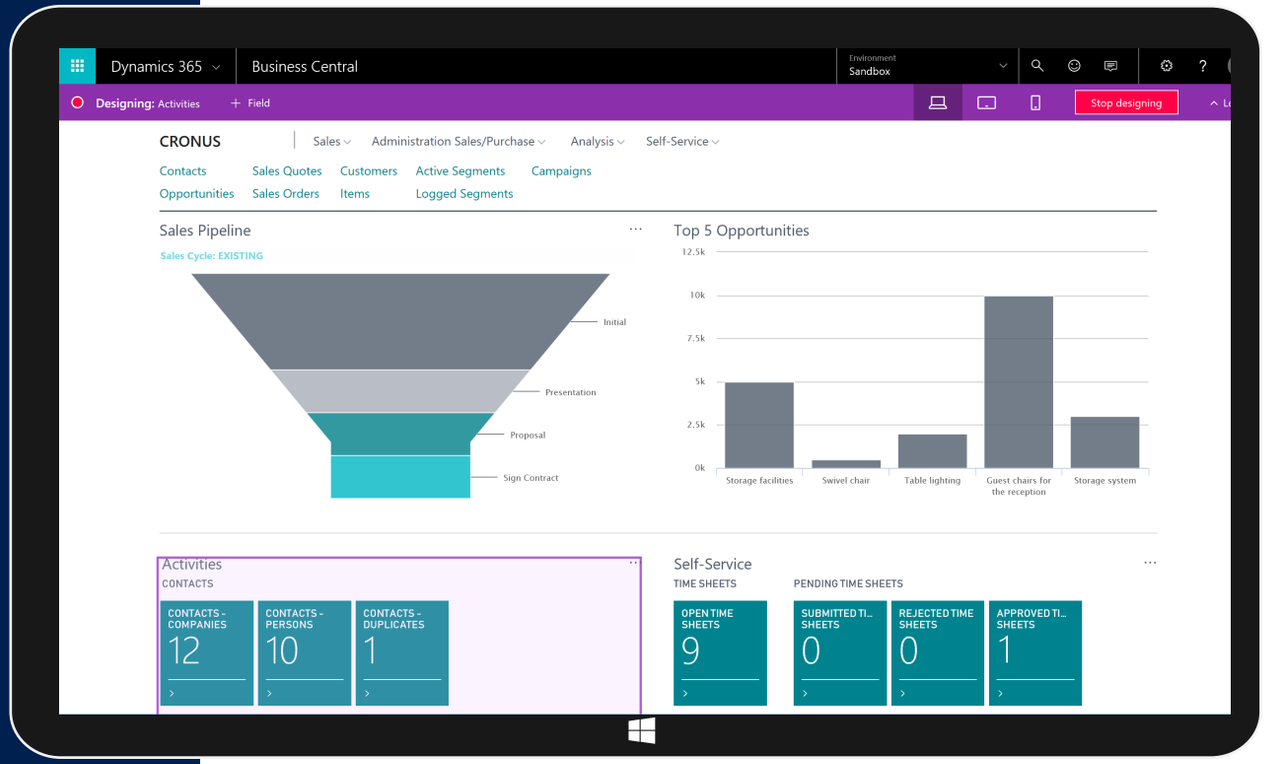


Start and grow easily

Tailor to your needs

Customize applications to support your unique business needs.

Rearrange fields, rename groups, and reposition elements using a simple drag-and-drop interface.



Integrato Partners

INTEGRATO
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ONE
SMART CONFIGURABLE SOFTWARE

Continia

COSMOS
DATA TECHNOLOGIES

INSIGHT WORKS

Avalara

insightsoftware

VARIS

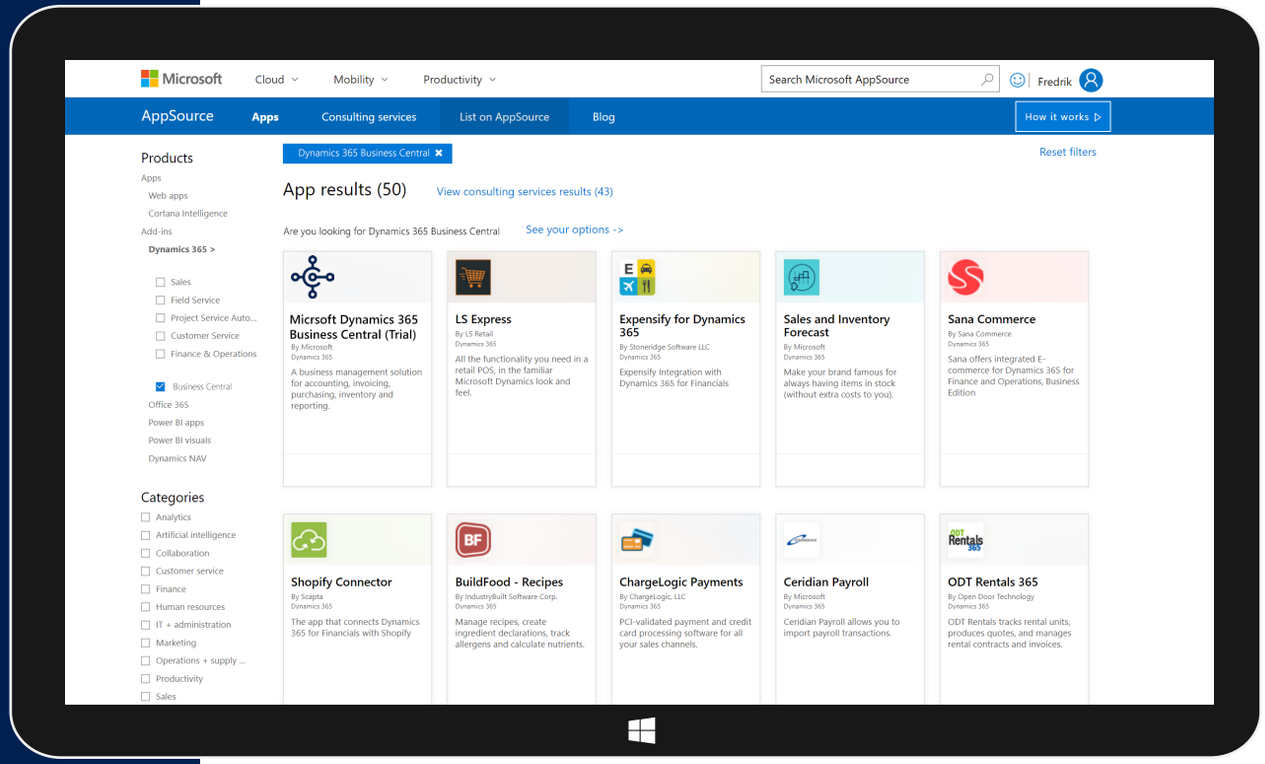
ChargeLogic

and more…

Add industry or business extensions

Extend Dynamics 365 Business Central to fit industry or business needs with integrated add-on apps.

Connect to data sources and services — Excel files, SharePoint lists and CRM records with Microsoft PowerApps.



Be ready for growth

Start with what you need and grow at your own pace to run your business securely in the trusted Microsoft cloud.

Easily manage growth using adaptable business applications, and a scalable database.

Appendix

Microsoft Dynamics 365 Business Central

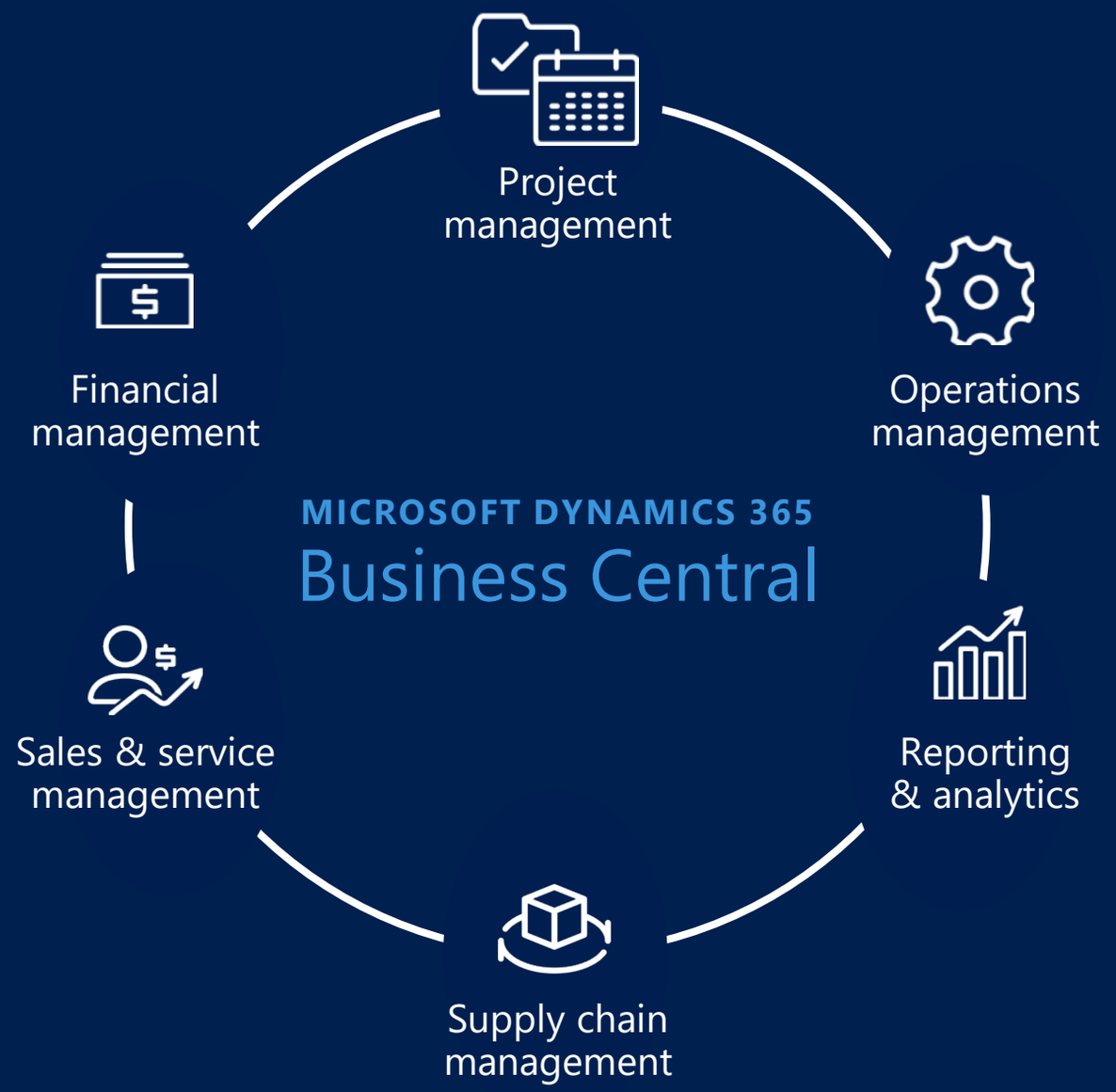
Core Capabilities

Financial management	Account receivables/ payables	Bank reconciliation	Fixed asset management	Month/Year end closing
Sales & service management	Quote generation	Contact management	Sales invoicing	Payment processing
Project management	Capacity planning	Budgets and estimates	Job and process costing	Resource management
Supply chain management	Inventory and Purchasing control	Shipment and distribution	Returns and cancellations	Procurement and vendor management
Operations management	Forecasting	Production planning	Manufacturing capacity	Warehouse management
Reporting & analytics	Customer insights	Self-serve reports	Interactive dashboards	Built-in intelligence

Deploy a single, comprehensive solution

Automatically pull systems and processes together to manage financials, sales, service, and operations

Connect with 3rd party applications like payroll, banking, CRM, or industry-specific systems



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

Kim Hulke, Sanchez Imports,
Accounting Manager

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