

# EBOOK Understanding Your Dynamics GP Options

The Ultimate Guide for Taking Dynamics GP to the Next Level

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## Introduction

Now's the time to review your long-term technology plan and make sure it supports your organizational growth strategy and goals.

#### Uncertainty Is at an All-time High

There's no denying companies are facing unprecedented uncertainty. From the economy and the war in Ukraine to Microsoft's laser focus on Dynamics 365 Business Central (BC), business leaders are overwhelmed, frustrated and looking for guidance on how to best protect and serve their customers, effectively compete and drive innovation moving forward. Agile, scalable and integrated technology solutions are at the core of your growth strategy. If your company is currently using Dynamics GP, this guide is designed to help you understand your options and decide **which** path makes the most sense given your unique situation, goals and resources.

#### **Different Versions, Same Questions**

If you're reading this, you know that Dynamics GP is Microsoft's legacy ERP system. It has undergone many iterations, including Dynamics GP 2015, GP 2016, GP 2018, GP 18.2, 18.3 and 18.5. The most current version is 18.5.

Microsoft provides extensive support for newer versions of GP, including bug fixes, new features, compliance updates, service packs and more—everything you need to run your business smoothly, safely and keep up with regulations. As with all other legacy ERP solutions, Microsoft has sunset support for older versions to shift resources to newer platforms. In accordance with <u>Microsoft's</u> <u>Modern Lifecycle Policy</u>, GP solutions with a fixed life cycle receive five years of mainstream support and five years of extended support. At the end of the extended support period, each version of GP will officially be sunset.

Although support for GP 18.2 and future versions will continue until at least 2028, **if you're not currently on the latest version of GP, you may be missing out on important security updates and functionality.** 



In this guide, we'll cover the A to Z of Dynamics GP today, including deciding whether you should stay and upgrade, host your GP environment in the Cloud or consider a move to Microsoft Dynamics 365 Business Central.

# Start with a Checkup of Your Dynamics GP Environment

Whether you're looking to get additional value out of your existing Dynamics GP environment, preparing for an upgrade or considering a migration to Microsoft Dynamics 365 Business Central, there's a lot to gain from performing a health check on your current GP system.

The first step in this process is to <u>use our free Enavate GP assessment tool</u> designed to help you analyze your GP environment and scope the requirements to consider in your migration plan. It'll help you **better understand your GP system, so you can make informed decisions on where to go next**—whether that means identifying how to improve and maximize existing processes or defining key considerations for moving to the Cloud and Business Central before you migrate.

This non-invasive tool analyzes your GP SQL server, looking at higher-level metadata and mining it to understand the modules, features, vendors and processes you use. It also analyzes additional products you've installed, such as ISV applications. This gives you a clear picture of what you currently are, or aren't using.

#### Running the assessment can be done in less than five minutes.

All that's required is a super user with read access to the SQL database, and the tool can be run on a desktop without the need for a server. Work can continue without disruption, as the assessment can run while your teams are using your GP system. Once you've run the tool, you'll receive an in-depth personalized report with findings to help inform the next steps in your technology journey.

## **OPTION 1:** Upgrade Your Dynamics GP Environment

Gain access to a variety of features, including:

- Enhanced user experience
- Year-end updates
- New features
- Greater ISV connectivity
- Bug fixes
- Security enhancements
- Compliance updates (for payroll, taxes and other legal workflows)
- Improved integration with other Microsoft programs
- Active support

One possible next step for GP users is to upgrade to a newer version. Microsoft releases at least three annual updates for supported versions of GP, with each update having approximately 30 new features. When you <u>upgrade your Dynamics GP</u> <u>system</u> to the newest version. Bug fixes and compliance updates are critical for businesses today. At the heart of system maintenance, Microsoft rollouts include service pack, hotfix and compliance updates. These provide fixes to reported problems and help ensure you're compliant with tax laws and accounting practices.

# Having access to new features helps you stay secure, competitive and efficient.

The latest version of GP includes increased security measures, as well as functionality updates. New features may solve for costly workarounds your team must perform to complete their tasks, which are timeconsuming and may compromise business data accuracy and security.

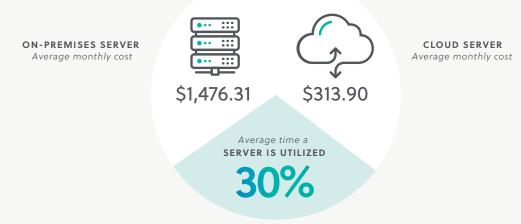
Upgrading also enables a more seamless connection to Independent Software Vendor (ISV) solutions. Oftentimes, leveraging a thirdparty product as well as your GP solution requires using the newest versions of both. Your efficiency and competitiveness demand the latest feature enhancements that Microsoft Dynamics has to offer. Unfortunately, not all versions of GP can be upgraded automatically to the current version. Instead, you may need to take several steps or "hops" to reach the current system.

A good rule of thumb for Microsoft Dynamics GP upgrades is that, in most cases, if you're on a specific release for one version of the GP application, you must upgrade to at least the equal release of the new version. For example, if you're currently on the 2021 year-end release of Microsoft Dynamics GP 2016, you must upgrade to at least the equal 2021 year-end release of Microsoft Dynamics GP 2018/18.

Each "hop" to a new version requires time and resources. **If you don't upgrade regularly, you may experience extended downtimes and higher upgrade costs to get on the current version.** 

If you want to update your Dynamics GP environment but don't know where to start, <u>reach out to our team of experts</u> to help you determine how many hops are needed to get your systems up to date, implement changes and update your ISV integrations.

## **On-premises VS.** Cloud: Financial Implications



Most on-premises IT costs are committed upfront and don't vary with demand. This means you're committed to the fixed capacity you've purchased, based on expected future demand and growth, which results in underutilized capacity. In fact, most organizations that host their applications on-premises purchase capacity, including servers, to accommodate their peak demand. According to atlantech.net, the average total cost of ownership (TCO) for an on-premises server is \$1476.31 per month. This cost includes:

- Direct costs: Hardware, software, backup, redundancy, HVAC
- Indirect costs: IT salaries or third-party management costs
- Hidden costs: Lost productivity due to downtime or over provisioning

Yet, according to Gartner, the average server is only utilized 30% of the time.

According to atlantech.net, the average monthly cost of a Cloud server is \$313.90. And when you host your applications in the Cloud, you pay for the service as you consume it. This variable cost model allows you to be more agile and optimize your capacity and spend. With Microsoft Azure, you also have:

- Pay-as-you-go and spot pricing to support elastic workloads
- Reserved instances with a lower price point to support static workloads

# **OPTION 2:** Host Your Environment in Microsoft Azure

# Azure is billed according to three services:

**Compute:** The virtual machines, memory and CPU that provide the infrastructure needed to run applications. These can run on Windows, Linux or SQL O/S. Compute capacity is billed by the second.

**Storage:** Secure Cloud storage that protects your data infrastructure storage solutions (which could vary) or can be attached to other resources such as virtual machines. Storage is billed by gigabyte per month.

**Networking:** Networking, or data transfer, allows connectivity between Cloud and on-premises infrastructure and services. You aren't charged for inbound data transfer, but you pay a fee for outbound data transfer. A second possible option for GP users to leverage their existing GP environment more fully is to move to the Cloud, in this case <u>Microsoft Azure</u>.

Microsoft Azure is one of the most trusted Cloud platforms available. It has capabilities other Cloud providers can't deliver due to scale or bandwidth limitations.

Azure is not a product. It's a suite of more than 200 different products and Cloud services. Azure is specifically designed for building, running and managing your applications across multiple Clouds, with the tools and frameworks of your choice.

Microsoft has roughly 3,500 security experts supporting Azure and spends \$1 billion annually on Cloud security. According to atlantech.net, they analyze more than eight trillion events, such as attempts to access your environment, each single day.

And Microsoft Defender Advanced Threat Protection automatically mitigates around 95 percent of all detected endpoint attacks.

That's why we offer real-time Azure cost predictions and optimizations, for which we examine your environment to be more costand use-efficient. These strengths are just a few of the reasons why nearly 95 percent of Fortune 100 companies use Microsoft Azure (*Source: Microsoft*).

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## Simple, More Secure Management



Enavate Cloud is a fully managed Microsoft Azure environment. <u>Hosting GP in Azure</u> with managed services delivers advantages for running the application, improving security and reducing dependency on local servers.

Our consultants are tried-and-true Microsoft Dynamics experts armed with innovative methodologies to help optimize your system performance. Enavate Cloud delivers more than the latest hardware and software, you also get:

- Visibility through a client portal, so you can easily see current incidents, support statuses and other information about your environment
- Guaranteed 99.95% uptime
- Peace of mind that comes from meeting regulatory compliance challenges
- Support for Windows server operating system administration
- Auditable patching updates, with systems patched on a regular basis
- Automated management, security and windows updates
- 24x7 support for your SQL server environment, including backups, optimization and performance tuning

# **OPTION 3:** Migrate to Microsoft Dynamics 365 Business Central

A third option for GP users is to <u>migrate to</u> <u>Microsoft Dynamics 365 Business Central</u>. Many businesses are making this move

Many businesses are making this move right now, and it's helpful to understand what this would entail, as well as the key differences and benefits.

#### Dynamics GP vs. Microsoft Dynamics 365 Business Central

Although Dynamics 365 Business Central and GP share similar characteristics, the workflow automation, Cloud backups, automatic updates and user-friendly dashboards make Business Central well worth the transition. And many of the third-party tools integrated into your GP system are native in Dynamics 365 Business Central.

Here are three key differences between GP and Business Central:

1. **Resource Requirements**—Some features of GP can be moved to the Cloud, but it's primarily an on-premises solution. Most companies running Microsoft Dynamics GP have on-site servers and must spend considerable resources paying IT and security teams to manage assets and maintain physical hardware. Business Central operates in the Cloud and doesn't require on-premises hosting or maintenance support.

2. Security and Updates—GP doesn't offer automatic updates. Instead, companies must pay a fee to update their software and IT teams must kick users out of the system to initiate the updates. With Business Central, Microsoft's team of IT professionals performs bug fixes and updates remotely. Business Central's monthly subscription also includes security and data backups.

3. Automation and Efficiency—Microsoft Dynamics GP has limited workflow automation functionality and crossplatform synchronicity. Often, teams must manually update and enter data, a process that's both time-consuming and prone to error. Business Central automatically syncs information via the Cloud, enables teams to access unified data and apps from anywhere, and streamlines processes.

Everybody wants to move to the Cloud. You're getting updated more frequently than with on-premises systems, it's mobilefriendly and it's user-friendly. Once we learned how to marry our work and the system, it was very easy to jump into our processes."

- Ron Allen, Chief Financial Officer, International Risk Management Institute (IRMI)

# 5 Key Benefits of Microsoft Dynamics 365 Business Central

After migrating to Business Central, your teams can still enjoy many of the workflows, add-ons and functionality they've come to rely on. In addition, once teams have acclimated to Dynamics 365 Business Central, they'll have access to greater automation, connectivity between tools and streamlined accounting options.

Some key benefits of Business Central include:



### 1. Automatic Updates

Microsoft releases minor updates monthly and major updates twice per year. All updates are included in the monthly subscription. Because changes are automated, you can schedule your updates during offhours to reduce disruption.

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### 2. Streamlined Workflows and Automation

Business Central connects Microsoft tools and third-party add-ons to synchronize data automatically and streamline workflows. For instance, teams can automate invoice approval, edit Excel spreadsheets in Business Central or process transactions and quotes directly from Outlook. And there are greater efficiencies for accounting teams for core processes.



# 3. Better Reporting and Analytics

Because platforms and channels are always connected, your team will have greater insight into companywide sales, marketing and customer analytics.

### **4.** Connectivity

Business Central works effortlessly with other Dynamics 365 apps, Office 365, PowerApps, Power Automate and Power Bl. It can also integrate with various third-party add-ons, so you can continue to use the custom software solutions you used in GP.



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### 5. Integrated Training

Business Central features built-in training modules, so team members can learn how to use each new tool with short videos and walkthroughs. Alternatively, they can hover over a function to trigger an explanatory popup.

## How to Prepare to Migrate from GP to Business Central

Dynamics GP isn't a complete ERP system as it only encompasses accounting and finance. Your migration to Dynamics 365 Business Central involves both a Cloud migration and the centralization of other ERP functions you're managing through other software and tools, so they're in one location. Regardless of your current infrastructure, there's a general path everyone will need to take to get to Dynamics 365 Business Central.



### Audit Your Current System

Take stock of what systems you use, processes, the data each system uses and the overlap of departments that use the same data. Mapping all this out will clearly identify how your systems and business processes are intertwined:



#### Analyze the Audit

It's not enough to just gather data. You must read into what the data is telling you. Where are the redundancies? What can be made more efficient and what problems can be fixed with technology? And which problems need improvements to streamline processes?



### Talk to the Teams

Talk to each team that'll be affected by migrating to Dynamics 365 Business Central. Find out what their current pain points are, their concerns about migrating to a new system and what's on their "wish list" to make their jobs more efficient with fewer headaches.

#### Find an ERP Partner You Can Trust

It takes some searching to find an experienced partner who's the right fit for your business. Make sure you're asking the right questions of potential partners who really know your industry. You want someone who's going to answer the hard questions and tell you, realistically, what you're up against and how they can help you overcome unavoidable obstacles in the migration process.



#### Prepare a Migration Roadmap

With Enavate, the first step to beginning a Business Central migration will be to request an assessment from our technology experts. Our <u>Enavate</u> <u>GP Assessment Tool</u> reviews your current infrastructure, technology requirements and business conditions in minutes by analyzing your metadata. The goal of the assessment is to lay out requirements, processes and goals that can be incorporated into a Business Central roadmap that'll best fit your business needs.

## How to Make the Final Moves to Migrate to Business Central

Enavate's team of professionals uses the information gathered through the assessment to determine a step-by-step plan to move your company to Business Central. Enavate offers complete migration services, including technical and <u>change management</u> support, so you can move to Microsoft Dynamics 365 Business Central with minimal disruption to your operations.

Enavate teamed up with Microsoft to develop the Microsoft GP Data Migration Tool, a **built-in migration tool to simplify the process of moving your data** from GP into the Cloud. Be advised this tool only works on GP 2015 and later versions. It also requires your on-premises system to be running SQL Server 2016 or a later version and your database needs a compatibility level of 130 or more. If you're on older versions of GP or SQL Server, you'll either have an additional step of upgrading prior to migrating to the Cloud, or you can choose to complete a full migration from square one.



Once your system requirements are met, you'll be able to migrate data to the Cloud, so you can fully operate on Business Central. This includes data related to inventory, customers, vendors, finance and more. Once you've migrated the following data into the Cloud, you'll be ready to use Dynamics 365 Business Central as your primary ERP:

- Chart of Accounts master records
- Customer records and outstanding transactions from the Receivables module
- Vendor master records and outstanding transactions from the Payables module
- Inventory items
- Checkbook master data
- Historical data from Inventory, Payables, Receivables, PO processing, and Sales Order processing

You'll likely encounter additional information that must be migrated manually. Your partner can help you plan for migrating this data.

### How to Migrate to Business Central Fast and Affordably

If you're ready to make the move to Business Central and want to start leveraging its efficiency, anywhere access and scalability sooner rather than later, <u>Enavate Xcelerate</u> is the fastest way to get you there with confidence. It leverages our **proven rapid deployment methodology to eliminate the high cost, lengthy deployment times and disruptions that plague traditional migrations.** Budgeting is easy with our transparent and predictable fixed-price approach, and defined timeframes ensure you know what to expect.

Xcelerate: GP to BC Finance Essentials starts with the Core Finance functionality and gives you the option to add additional Business Central functionality and more as needed.

Here's an overview of what you can expect:

Package Details	Enavate Xcelerate: GP to BC Finance Essentials	Enavate Xcelerate: GP to BC Finance Enhanced
Designed for	Current users of Dynamics GP with the basic accounting requirements	Current users of Dynamics GP with more complex requirements
Go-live Time	10 weeks	12 weeks
Business Central Functionality	<ul> <li>Finance</li> <li>Accounts Payable</li> <li>Accounts Receivable</li> <li>Cash &amp; Banking</li> <li>Basic Reporting</li> </ul>	<ul> <li>Advanced Finance</li> <li>Accounts Payable</li> <li>Accounts Receivable</li> <li>Advanced Cash &amp; Banking</li> <li>Basic Reporting</li> <li>Fixed Assets</li> <li>Multi-company Setup and Consolidations</li> </ul>

Both Xcelerate GP to BC migration packages include:

- Migration assessment and recommendations
- Business Central provisioning in Microsoft SaaS
- Project management
- Business Central Finance module basic accounting configuration
- GP data migration using Microsoft's GP
   Data Migration Tool (for GP versions 2015 and up with SQL 2016 and up)
- First month-end close assistance

Enavate understands you have requirements that go beyond the basics, such as functionality that relies on thirdparty providers and in-depth reporting. Once we complete the basics, our Integrations and Reporting Workshops give us the opportunity to address your additional needs, for example advising you on ISVs that are BC optimized.

Learn more about how Enavate Xcelerate might be <u>your best path to Microsoft</u> <u>Dynamics 365 Business Central</u>.

### What Do You Need to Know About Licensing for Business Central?

When you buy Business Central as a hosted, subscription-based solution, the monthly user fee includes both the software and management of the hosting environment. The two licensing options for BC are **Essentials** and **Premium**. Each provides access to a wide range of features and capabilities in BC. Once you determine the functionality that'll accommodate your business needs, all your user licenses will be under that option.

Where GP user licenses are concurrent, limiting the number of users who can be logged into the system at any one time, BC licenses are named users and each person who logs into the system must have their own user license. You'll need to review your entire list of GP users to determine how many people will need a BC license.



**Essentials License:** Essentials licenses are the first level of BC user licenses. They are \$70 per user per month and include the following capabilities:

- Financial Management
- Supply Chain Management
- Human Resources Management
- Warehouse Management and Inventory
- Project Management
- Customer Relationship Management

**Premium License:** Premium licenses build upon the Essentials license and are \$100 per user per month. The capabilities include all the same features as the Essentials license, plus the following:

- Service Order Management
- Manufacturing

**Team Member License:** Users who require readonly access, or who approve or reject workflows assigned to them in BC can use a Team Member License. For users who don't need a full Essentials or Premium user license, the Team Member License is a good alternative. Team Member licenses are \$8 per user per month.

### Enavate—Your Partner for GP, Business Central and Beyond

As a trusted Microsoft partner with extensive experience working with both Dynamics GP and Business Central, Enavate can help you make the best decisions for the future of your business software. Changes in your technology shouldn't be done quickly or on a whim, like a task on a to-do list. Any change, whether staying on GP or migrating to Business Central, requires thoughtful and careful planning and a clear vision of how your business operates today and where you need to be tomorrow. Getting guidance from an expert is often exactly what you need to get on the right path. For instance, our team can review your goals and assist you in determining the most appropriate timeline for your technology and business to help determine if, and when, the Dynamics 365 migration is right for you. You may want to begin your transition right away or decide to test certain Business Central functionality for a few months before leaping into a complete migration.

Regardless of which path you choose, Enavate will be there for you every step of the way. We know you have questions about where to go from here with GP.



You always come across things after training and you're in the actual use of the product. Our Account Manager was right behind us through the whole process. It was a very nice, smooth implementation."

> **Tammy Koehler** Chief Financial Officer, <u>Andretti Indoor Karting & Games</u>

# ENAVATE.

Contact our experts to explore your options and discover the answers—together.

**CONTACT OUR EXPERTS**