Dynamics NAV to Dynamics 365 for Finance and Operations assessment

Digital Transformation Progress Report

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# Executive Summary

This section will summarize the document at an executive level for key stakeholders. It will review the key areas in which this organization has made progress, and where they can still make progress

# Overview of key processes

## Sales Order Entry

This section will describe current order entry process at a summary level and where it can be improved. Examples of areas to be covered will include:

* Can your users navigate the order entry screen easily to get a 360 degree view of the customer?
* How long does it take your users to find the item(s) that the customer is searching for.
* Does the system suggest items to the person creating the order? If so, how are these items suggested?
* Is inventory availability by location easy to find and is it accurate?
* Does the system provide a complete picture of line item profitability?
* How is gross margin calculated on the order?
* How do you calculate standard/replacement cost?

## Order Fulfillment

This section will drill into warehouse management, shipping and the process of how an order is picked, packed and shipped.

* How is the shipping cost calculated and quoted?
* How do you determine how this item will be shipped or delivered?

## Counter Sales

If your organization takes sales onsite at branches or warehouses, what is the process like for your users and customers. If the process is simple and your users like it, then your customers will have a better experience

* Do you take sales at the counter?
* How do you easily process payment methods – credit card, phone, etc.?

## Trade Agreements and Rebates

In this section we will review the types of special agreements common in your industry and assess how they can be better tracked. The types of agreements to be covered will include:

* Vendor Rebate programs
* Co-op marketing agreements
* Royalty agreements
* Customer rebate programs

## Purchasing and Forecasting

We will review your current methods for distribution requirements planning and cover the following areas in more detail.

* If there are multiple branches is your purchasing centralized in order to get best prices?
* Is your forecasting system comprehensive enough to accurately forecast by looking at sales history, item availability, items on PO but not received, etc.?

## Technology Infrastructure

We will discuss your current infrastructure and how these scenarios are handled

* Disaster recovery
* System availability
* Remote user experience
* Security and Compliance

# Progress report

This section will evaluate your process in key areas and identify where you can improve by implementing Microsoft Dynamics 365 for Finance & Operations

## Sales Order Entry

## Counter Sales

## Order Fulfillment

## Rebates and Trade Agreements

## Purchasing and Forecasting

## Technology Infrastructure

# Conclusion