



Promo ERP

Built on

Microsoft Dynamics
365 Business Central

Product Overview &
Capability Guide

Connect your financials, sales, service and operations to make smarter decisions.

Microsoft Dynamics 365 Business Central is an all-in-one business management solution that's easy to use and adapt, helping you connect your business and make smarter decisions. A Modern Digital Business Management Solution:

▶ **Actionable Insights**

Achieve greater outcomes and gain a complete view of your business with connected data, useful business analytics and guidance delivered by Microsoft's leading intelligence technologies.

▶ **Enterprise Connectivity**

Unify your business while boosting efficiency with automated tasks and workflows—all integrated with familiar office tools like Outlook, Word, and Excel.

▶ **Mobility**

Access to a fully mobile-enabled user interface across desktop, laptop, tablet or phone – Windows, Apple or Android.



1. Manage your financials



1. Manage your financials

2. Automate and secure your supply chain

3. Sell smarter and improve customer service

4. Keep projects on time and under budget

5. Optimize your operations

6. Protect your data and support GDPR compliance

7. Take Advantage of Promo Centric features

8. Business Central 365 Licenses and Subscriptions

9. Add on products

10. Appendix A

1. Manage your financials

► Make informed decisions

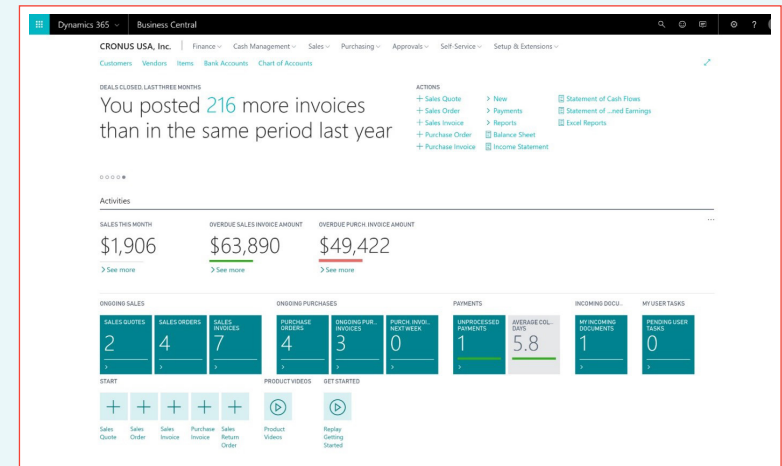
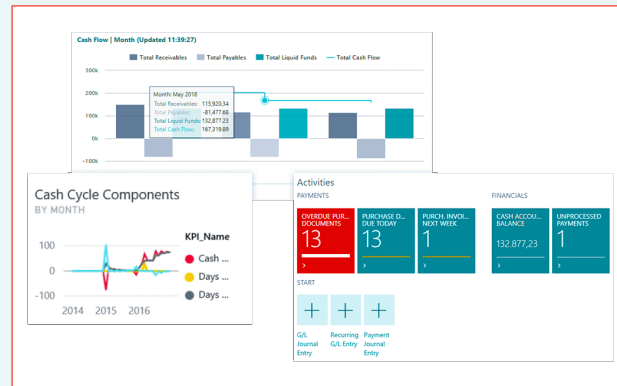
Connect data across accounting, sales, purchasing, inventory, and customer interactions to get an end-to-end view of your business. Chart financial performance in real time with built-in Power BI dashboards.

► Accelerate financial close and reporting

Streamline accounts receivables and payables, and automatically reconcile accounts to close and report on financials quickly and accurately, while maintaining compliance.

► Improve forecast accuracy

Refine financial forecasts by modelling and analysing data across multiple dimensions. Customize reports using seamless Microsoft Excel integration.



2.

Automate and
secure your supply chain



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2. Automate and secure your supply chain

▶ Optimize inventory levels

Use built-in intelligence to predict when and what to replenish. Purchase only what you need with dynamically updated inventory levels.

▶ Avoid lost sales and reduce shortages

Maintain the right amount of inventory by automatically calculating stock levels, lead times, and reorder points. Suggest substitutes when requested items are out of stock.

▶ Maximize profitability

Get recommendations on when to pay vendors to use vendor discounts or avoid overdue penalties. Prevent unnecessary or fraudulent purchases through approval workflows.

The screenshot displays a dashboard for inventory management. It features a grid of product cards, each with an image, a name, a quantity, and a price. A forecast chart on the right shows a downward trend in inventory levels over time. A pop-up window titled 'EDIT - ITEM AVAILABILITY BY EVENT - 1900-S PARIS GUEST CHAIR, BLACK' is open, showing a table of event availability data.

PERIOD START	DESCRIPTION	SOURCE	DOCUME. NO.	RESERVED REQUIREME.	RESERVED RECEIPT	AVAILABLE BALANCE
4/14/2018	Saturday					8
4/14/2018	Wide World Importers	Purchase Order	106003			8

3.

Sell smarter and improve customer service



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3. Sell smarter and improve customer service

▶ Deliver value at every touch point

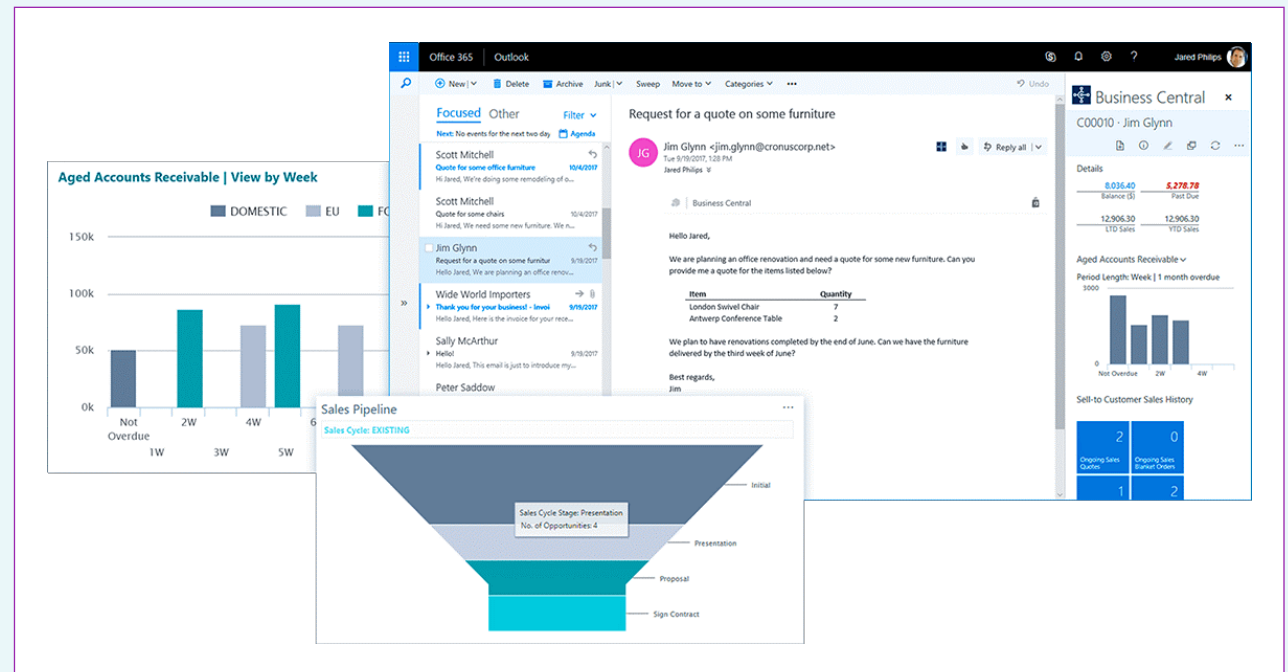
Prioritize sales leads based on revenue potential. Keep track of all customer interactions and get guidance on best upsell, cross-sell, and renewal opportunities throughout your sales cycle.

▶ Boost sales productivity

Accelerate the quote to cash process. Act quickly on sales-related inquiries, manage service requests, and process payments—all from within Outlook.

▶ Deliver exceptional service

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



4.

Keep projects on time
and under budget



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4. Keep projects on time and under budget

► Stay on budget

Create, manage, and track customer projects using timesheets along with advanced job costing and reporting capabilities. Develop, modify, and control budgets to ensure project profitability.

► Plan with precision

Manage resource levels by planning capacity and sales. Track invoicing for customers against planned costs on orders and quotes.

► Analyze project performance

Make effective decisions with real-time insight on project status, profitability, and resource-usage metrics.

The screenshot displays a software interface with two main components:

VIEW - EMPLOYEE LIST + New

Hill Annette	Secretary	Roberts John	Managin
Dempsey Mary	Designer	Hanson Mark	Production
Saddow Peter	Sales Manager	Lum Richard	Production
Sneath Timothy	Production Assistant		

Job Details

Job No.	JOB00020
Budget Cost	
Resource	360,00
Item	328,00
G/L Account	235,00
Total	923,00
Actual Cost	
Resource	345,00
Item	205,00
G/L Account	233,00
Total	783,00
Billable Price	
Resource	1,440,00
Item	420,00
G/L Account	0,00
Total	1,860,00
Invoiced Price	
Resource	321,00
Item	102,00
G/L Account	340,00
Total	763,00

5. Optimize your operations



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5. Optimize your operations

- ▶ **Manage forecasting to fulfillment**
Use sales forecasts and expected stock-outs to automatically generate production plans and create purchase orders.
- ▶ **Run your warehousing efficiently**
Get a holistic view of inventory for efficient order fulfilment. Track every item transaction and movement by setting up bins based on warehouse layout and storage unit dimensions.
- ▶ **Reach optimal output levels**
Calculate and optimize manufacturing capacity and resources to improve production schedules and meet customer demands.

NEW - WAREHOUSE SHIPMENT - SH000005

SH000005

General

No. SH000005 Posting Date 3/1/2018
 Location Code WHITE Assigned User ID
 Zone Code SHIP Assignment Date
 Bin Code W-09-0001
 Document Status
 Status Open

Lines

SOURCE DOCUMENT	SOURCE NO.	ITEM NO.	DEMAND DATE
Sales Order	1001	1896-S	AT
Sales Order	1001	1925-W	CC
Sales Order	1001	1908-S	LC

Shipping

External Document No.
 Shipment Date 3/1/2018
 Shipping Agent Code

EDIT - ITEM AVAILABILITY BY BOM LEVEL

OPTION 1000 Calculated
 Item Filter Location Filter Show Total Availability
 Demand Date 3/1/2018

NO.	DESCRIPTION	WAR.	BO.	QTY. PER PARENT	UNIT OF MEASURE CODE	REPLEN. SYSTEM	AVAILABLE QUANTITY	NEEDED BY DATE
1000	Bicycle		<input checked="" type="checkbox"/>	12	PCS	Prod. Order		3/1/2018
1100	Front Wheel		<input checked="" type="checkbox"/>	34	PCS	Prod. Order		3/1/2018
1110	Rim		<input checked="" type="checkbox"/>	44	PCS	Purchase		2/15/2018
1120	Spokes		<input type="checkbox"/>	55	PCS	Purchase		2/15/2018
1150	Front Hub		<input type="checkbox"/>	100	PCS	Prod. Order		2/15/2018
1151	Axle Front Wheel		<input type="checkbox"/>	25	PCS	Purchase		2/15/2018
1155	Socket Front		<input type="checkbox"/>	67	PCS	Purchase		2/15/2018
1160	Tire		<input type="checkbox"/>	10	PCS	Purchase		2/15/2018
1170	Tube		<input type="checkbox"/>	89	PCS	Purchase		2/15/2018
1200	Back Wheel		<input type="checkbox"/>	50	PCS	Prod. Order		3/1/2018
1110	Rim		<input type="checkbox"/>	46	PCS	Purchase		3/1/2018
1120	Spokes		<input type="checkbox"/>	122	PCS	Purchase		3/1/2018

Swivel Chair 45 PCS
 Chair, yellow 100 PCS

6.

Protect your data and
support GDPR compliance



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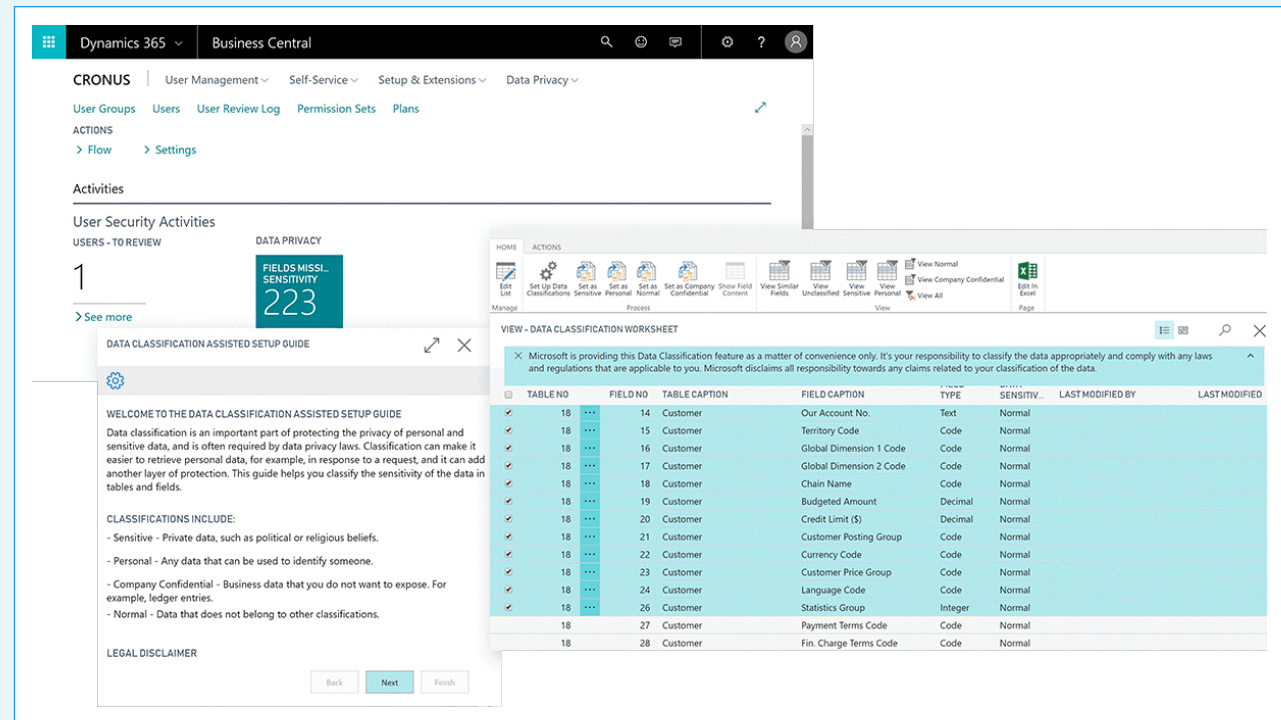
6. Protect your data and support GDPR compliance

► Respect your customer's privacy

Use built-in privacy-by-design and privacy-by-default methodologies to help your business comply with the General Data Protection Regulation (GDPR). Grant and restrict access to personal data on multiple levels and enable audit trails to ensure security and accountability.

► Handle, store, and transmit data securely

Move and store personal data freely across your systems while protecting it from unauthorized access with Microsoft datacenters' automatic encryption.



The screenshot displays the Dynamics 365 Business Central interface. The top navigation bar shows 'Dynamics 365' and 'Business Central'. The main area is titled 'CRONUS' and includes navigation options like 'User Management', 'Self-Service', 'Setup & Extensions', and 'Data Privacy'. The 'Data Privacy' section is active, showing 'User Security Activities' and 'USERS - TO REVIEW' with a '1' indicator. A 'DATA CLASSIFICATION ASSISTED SETUP GUIDE' is open, providing instructions on data classification. A 'VIEW - DATA CLASSIFICATION WORKSHEET' is also visible, displaying a table of data fields and their classifications.

TABLE NO	FIELD NO	TABLE CAPTION	FIELD CAPTION	TYPE	SENSITIV...	LAST MODIFIED BY	LAST MODIFIED
18	...	14 Customer	Our Account No.	Text	Normal		
18	...	15 Customer	Territory Code	Code	Normal		
18	...	16 Customer	Global Dimension 1 Code	Code	Normal		
18	...	17 Customer	Global Dimension 2 Code	Code	Normal		
18	...	18 Customer	Chain Name	Code	Normal		
18	...	19 Customer	Budgeted Amount	Decimal	Normal		
18	...	20 Customer	Credit Limit (\$)	Decimal	Normal		
18	...	21 Customer	Customer Posting Group	Code	Normal		
18	...	22 Customer	Currency Code	Code	Normal		
18	...	23 Customer	Customer Price Group	Code	Normal		
18	...	24 Customer	Language Code	Code	Normal		
18	...	26 Customer	Statistics Group	Integer	Normal		
18	...	27 Customer	Payment Terms Code	Code	Normal		
18	...	28 Customer	Fin. Charge Terms Code	Code	Normal		

7.

Take Advantage of Promo Centric features



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7. Take Advantage of Promo Centric features

▶ Automated Proof Approval

An automated online proof approval system with reminders that helps you get approvals faster and hands free. Automated proof/ art status updates. Buckets for the art team to manage priority art and day. Auto creation of art folders.

▶ Suggestion of Freight estimates and Additional charges

Integration with UPS worldship and FEDEX Ship manager. Charges and freight charges suggested by the system based on the order configuration and type of shipment. Label generation. Tracking number updates.

▶ Integration with website and promo standards

A single point of control of all data which is accessed by the website as well as promo standards.

▶ Product master customized for Promo

Product Master customized for imprint details, methods, discount codes, quick ships, charges related to imprint methods, carton logic, in hands date, all web related data etc.

▶ Workflows based on the type of order

Types of orders having their own workflows- Blank orders, Imprinted orders, Split ship orders, Pre Orders, Back orders, 3rd Party ship orders, Overseas orders, Orders outsources for imprinting/ decoration.

A photograph of a business meeting in progress. Several people in suits are seated around a wooden conference table. In the foreground, a silver laptop is open, and a tablet lies flat on the table. A smartphone is also visible. Papers with charts and documents are scattered on the table. The background is softly blurred, showing a bright window. A teal-colored text box is overlaid on the upper left portion of the image.

8.

Business Central 365 Licenses and Subscriptions

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8. Business Central 365 Licenses and Subscriptions

Subscriptions are named user subscriptions where a user is licensed for Dynamics 365 Business Central Essential or Dynamics 365 Business Central Premium.

Dynamics 365 Essential	Dynamics 365 Premium
Financial Management	Everything in Essential
Customer Relationship Management	Service Management
Project Management	Manufacturing
Supply Chain Management	
Human Resources Management	
Warehouse Management	

Default Subscription Capacities

Production Instance	1 Included
Non-Production Instance	None
File Storage	Unlimited
Database Storage	Unlimited
External Accountant Licenses	1 Included
Companies	Unlimited
Cortana Intelligence	1800 seconds per month/tenant

9.

Add on products

BUSINESS
TOOLS

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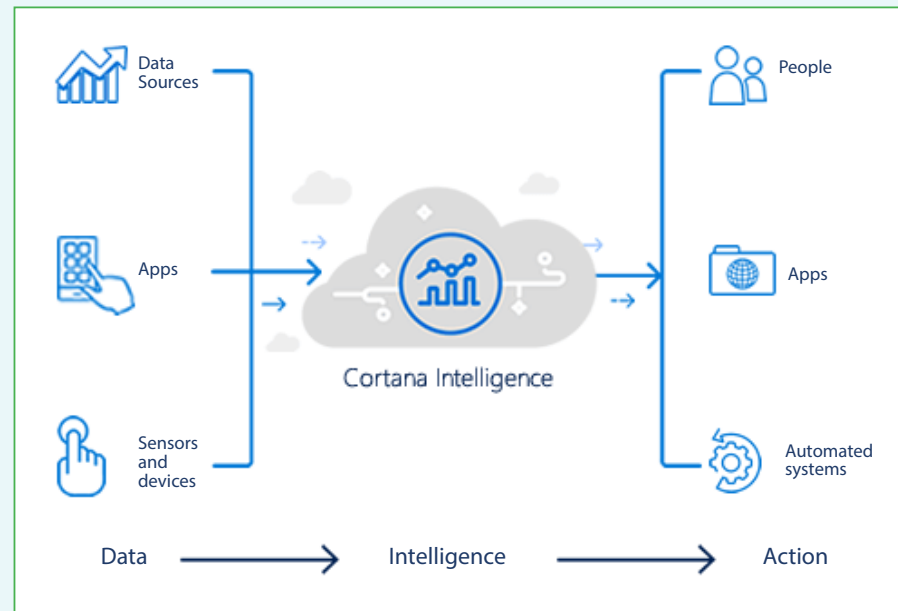
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► Microsoft Power BI in Dynamics 365

Power BI is a suite of business analytics tools that deliver insights throughout your organization. Connect to hundreds of data sources, simplify data prep, and drive ad hoc analysis. Produce beautiful reports, then publish them for your organization to consume on the web and across mobile devices. Everyone can create personalized dashboards with a unique, 360-degree view of their business. And scale across the enterprise, with governance and security built-in.

► Cortana Intelligence

Cortana Intelligence is a Suite of service offerings on the Microsoft Azure Cloud, which enable businesses to transform the data into Intelligent Actions. The following is a high level diagram which shows where exactly Cortana Intelligence Suite fits in the overall Data Analytics Ecosystem.



Source: Microsoft (<http://bit.ly/1RTOHRg>)

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Cortana Intelligence allows us to process the data from a variety of data sources, transform the data, apply advanced analytical techniques (Data Mining, Machine Learning etc.), and extract actionable insights which enables the business to take intelligent and timely actions.

Data can be extracted from a variety of data sources including applications, files, logs, devices and sensors, and a variety of Big Data and Internet of Things (IoT) systems. There are various offerings as part of Cortana Intelligence Suite which enable data engineers and power users to extract valuable insights from such variety of data sources and deliver them to decision makers, applications, and automated systems enabling them to take intelligent actions.



► Charge Logic Credit Card Processing

Charge Logic Payments is the leading PCI-compliant credit card and payment processing software integrated with Microsoft Dynamics.

Charge Logic's approach to easy, secure, and reliable electronic payment processing helps you stay focused on your business. Built on an encrypted web services platform and completely integrated with Microsoft Dynamics NAV (formerly Navision), users can easily enter data for authorization. Charges are automatically settled when sales orders are shipped or when a retail sale is complete.

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Contact us

Learn more

Consultation and pricing

Alpa Patel

E: alpa@powerweave.com

T: +91 22 40079343

Pratik Thakore

E: pratik@powerweave.com

T: +91 22 40079343

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► Essential Functionality

Financial Management		
Basic General Ledger	Basic Fixed Assets	Electronic Payment / Direct Debits*
Allocations	Insurance	Bank Account Reconciliation
Budgets	Maintenance	Payment Handling
Account Schedules	Fixed Assets Allocations	Cash Flow Forecast
Consolidation	Reclassifications	Advanced Dimensions
Basic XBRL	Bank Account Management	Deferrals
Change Log	Check Writing	Multiple Currencies
Advanced Financial Management		
Responsibility Centers	Inter-company Postings	Cost Accounting
Customer Relationship Management		
Contact Management	Dynamics 365 for Sales and Dynamics 365 for Customer Service	
Task Management	Opportunity Management	Campaign Management
Outlook Client Integration	Interaction / Document Management	Relationship Management
Contact Classification	Mail Logging	Notifications
Project Management		
Basic Resources	Estimates	Time Sheet

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Capacity Management	Tasks/Steps	User Tasks
Multiple Costs	Jobs	
Supply Chain Management		
Basic Receivables	Requisition Management	Item Cross References
Sales Invoicing	Alternative Order Addresses	Non stock Items
Sales Order Management	Purchase Return Order Management	Item Tracking
Sales Invoice Discounts	Purchase Line Discounting	Item Charges
Alternative Ship-To Addresses	Purchase Line Pricing	Bin
Shipping Agents	Drop Shipments	Pick
Sales Return Order Management	Salespeople / Purchasers	Analysis Reports
Sales Line Discounting	Basic Inventory	Item Budgets
Sales Line Pricing	Multiple Locations	Workflow
Sales Tax / VAT*	Document Management, Document Capture and OCR Document Management, Document Capture and OCR	
Basic Payables	Alternative Vendors	E-services
Purchase Invoicing	Assembly Management	Item Categories
Purchase Order Management	Location Transfers	Item Attributes
Purchase Invoice Discounts	Item Substitutions	Stock keeping Units
Human Resources Management		
Basic Human		

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Warehouse Management

Order Promising	Put Away	Warehouse Management Systems
Calendars	Warehouse Receipt	Internal Picks and Put Aways
Campaign Pricing	Warehouse Shipment	Automated Data Capture System
Cycle Counting	Standard Cost Worksheet	Bin Set-Up

Other

Unlimited Companies	Job Queue	Word reporting/Document reporting
Multiple Currencies	Reason Codes	User Management
Intrastat	Extended Text	Embedded Power BI

► Premium Functionality

Service Order Management

Service Order Management	Service Item Management	Planning and Dispatching
Service Price Management	Service Contract Management	

Manufacturing

Production Orders	Basic Supply Planning	Finite Loading
Production Bill of Materials	Demand Forecasting	Sales and Inventory Forecasting
Version Management	Basic Capacity Planning	Agile Manufacturing
Machine Centers		

► Product Overview

<https://www.youtube.com/watch?v=nqM79hIHuOs>

aws

artworkservicesusa

ART ■ WEBSITES ■ SERVICES

www.artworkservicesusa.com

USA

📍 Suite 410, 8815 Center Park Drive
Columbia, MD 21045

☎ +1 443 283 3456

🖨 +1 360 397 1410

UK

📍 Oakfield, Little Somerford Wiltshire
SN15 5JX

☎ +44 207 096 0237

INDIA

📍 Plot No. 27, Road No.11 Marol Industrial Area
MIDC Andheri (E), Mumbai 400093

☎ +91 22 40079343

🖨 +91 22 40079334

