









contract  ERP

a COMPUSOFT product

Agenda

- 1  Microsoft Dynamics 365
Business Central On-line vs On-premise
- 2  Business Central Version Release
Schedule
- 3  Upgrading Process and Options
- 4   Help Yourself!
New On-Boarding & Help System
- 5  Front End Detailing Partners &
Applications





Microsoft Dynamics 365 Business Central On-line (CSP) vs On-Premise

	On-premise	On-line
Accessibility	<ul style="list-style-type: none"> Built for on-premise deployment on a server. It can be hosted within a private cloud but doesn't offer the same seamless experience as a fully managed cloud-based solution. 	<ul style="list-style-type: none"> All the capabilities of the on-premise version. Benefit of being a true cloud solution. Easy 24/7 access anywhere from any device to real-time information.
Customization	<ul style="list-style-type: none"> Supports Extension development as well as core object changes. <i>Core Object Changes are not recommended going forward even with an on-premise install.</i> 	<ul style="list-style-type: none"> Supports Extensions only, easy integration using Web API
Integration	<ul style="list-style-type: none"> Limited control on applications on Power platform Some limitations with M365 integration. 	<ul style="list-style-type: none"> Tight / built-in integration to the Power Platform and M365 application stack.
Upgrade	<ul style="list-style-type: none"> Requires a complete install process for each version upgrade. 	<ul style="list-style-type: none"> Automatic Upgrades.
Hosting	<ul style="list-style-type: none"> Investments need to be made into existing hardware and IT infrastructure as equipment ages or scaling is required. Client is responsible for all environment related services. 	<ul style="list-style-type: none"> Hosted and Managed within the Microsoft cloud. Everything is included in one fee—software, cloud hosting, and environment managed services. Data is stored in the Microsoft cloud, removing the need to install SQL Server locally. Both Computing and Database Capacity automatically scale based on pre-defined algorithms.
Licensing	<ul style="list-style-type: none"> Perpetual (purchased) or Subscription licensing option. Perpetual Licenses still require the 16% Enhancement Plan. 	<ul style="list-style-type: none"> Only a Subscription License model. No Enhancement Plan. The monthly subscription includes all fees related to the application, hosting and database.



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Business Central Version Release Schedule

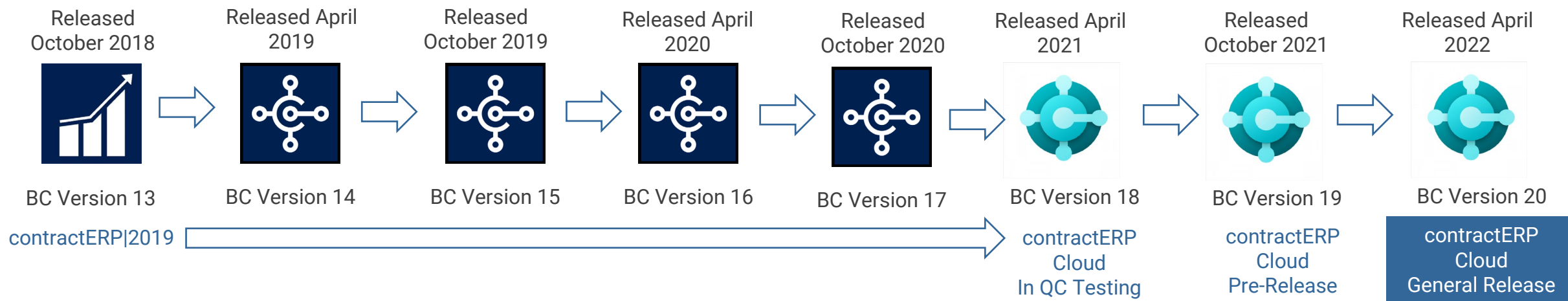
Two “Major” Releases Per Year

- Wave 1 – April of each year
- Wave 2 – October of each year

Current Version is 2022 Wave 1 (*Microsoft’s Internal version = v20*)

- contractERP is current on this version

✓ contractERP is now a complete Extension-based solution and will support the Microsoft ongoing release schedule



1. Microsoft Licensing Promotion for “Moving to the Cloud”
2. Transition License Examples
3. Process of Upgrading (By version of contractERP)

Microsoft's Bridge To The Cloud (CSP License) Promotion:

Who is eligible for the promotion?

- Any Business Central (NAV) Licensed Customer who is current with their Annual Enhancement “Maintenance” Plan (EP)
- Offer expires December 31st 2022

What is the offer?

- Transition your Perpetual License Enhancement Plan to a Subscription “Cloud” License.
- Includes the Microsoft Business Central Online (formerly NAV) License and all your licensed contractERP feature-set.
- **FULLY** hosted solution within the Microsoft Azure Cloud provisioned for Business Central
- ***Your Transition Investment is equal to your current Enhancement Plan.**
 - **Some external 3rd Party Add-in Apps may not apply*

What are the benefits?

- Fully hosted solution within the Microsoft Azure Cloud for Business Central.
 - No Local or Private Cloud Server / Infrastructure Investment.
- If you still have concurrent user licenses you get a 3 to 1 conversion to named users at no additional cost to you.
- Allows for Dual Access Rights to continue to run your On-Premise License while you are transitioning to the Cloud version.
- The offer locks in these rates for four (4) years. Microsoft is inclined to extend that as well.
- No Ongoing Annual Enhancement Plan.
- All version Upgrades /Updates are included (*Less any training or implementation assistance*).

Microsoft's Bridge To The Cloud (CSP License) Promotion:

- Parallel License Conversion (excludes any new features or additional users)*

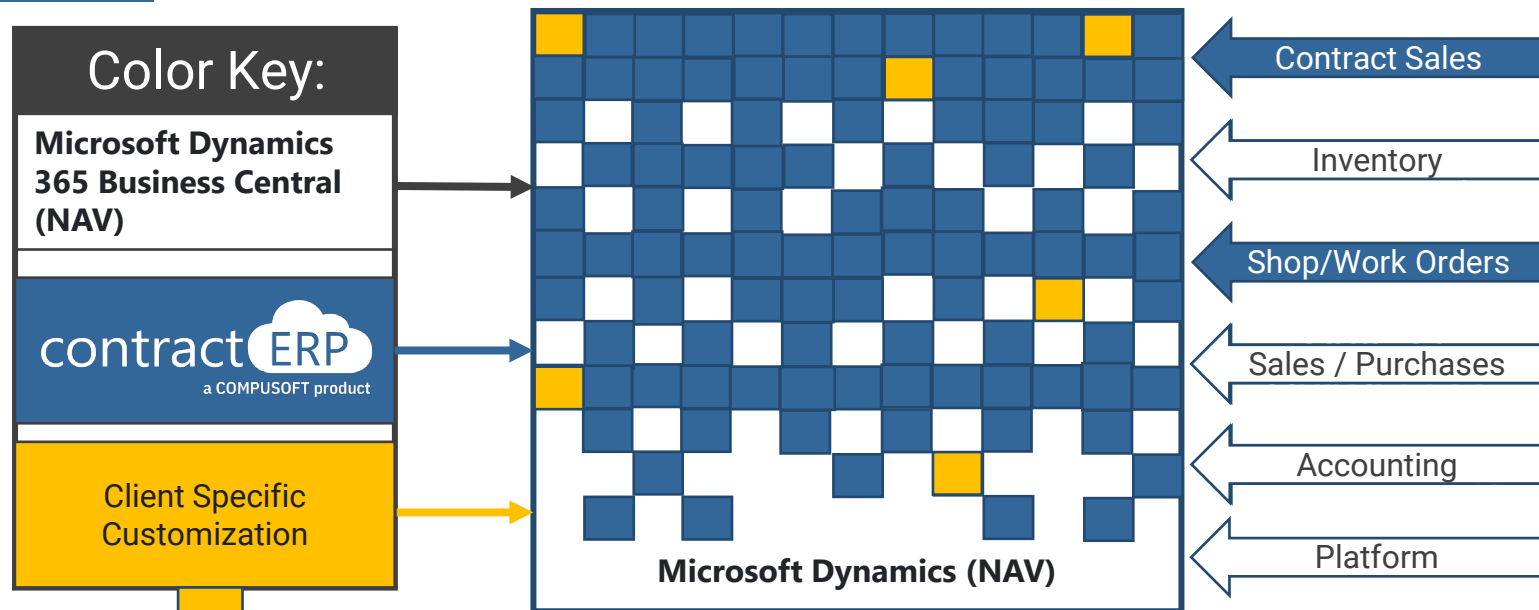
Investment Example 1: Concurrent License to Named Users and Move to the Cloud

Concurrent License Count	3 to 1 Conversion of Users to Named Users	Team (Limited) Users	Current Annual Enhancement Plan	Annual Subscription with Promotion (Min 4 years)	Includes All Cloud Server Hosting Services
12	36		\$12,320	\$12,320	\$0

Investment Example 2: Previously Converted to Named Users now Moving to the Cloud

Named Users (Already Converted from concurrent)	Advanced contractERP Features	Team (Limited) Users	Current Annual Enhancement Plan	Annual Subscription with Promotion (Min 4 years)	Includes All Cloud Server Hosting Services
66	<ul style="list-style-type: none"> WMS Capacity Scheduler 		\$26,040	\$26,040	\$0

Client using **contractERP|2016** (or older) or **contractERP|2019** *WITH* Embedded Customizations



Expect an embedded customization to be 50%-75% of the original development value.

Each customization will be reviewed individually which may alter this estimate +/-

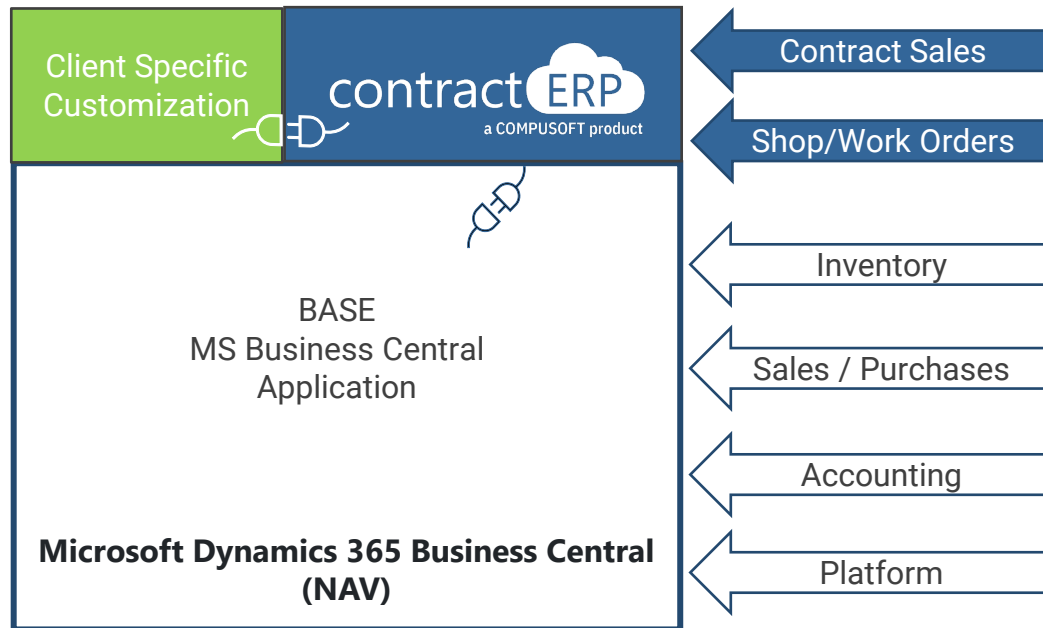
Upgrade Path

- Any customization needed in the new version will require converting to an extension.
- Data upgrades will need to pass through previous versions to convert to the current contractERP version.

Re-implementation is suggested if running contractERP2016 or older:

- Re-evaluate any specific code change to determine if required in the current state of contractERP.
- Data is exported and migrated to the latest version.
- Best opportunity to correct adopted process flows that don't support the best use of the application.

Client using contractERP version 2019 with EXTENSION Customizations:



Upgrade Path

- Customizations are already an Extension and will publish into the latest version.
 - Data upgrades will need to pass through previous versions to convert to the current contractERP version.
- Re-implementation is an option but not required**
- Best opportunity to correct adopted process flows that don't support the best use of the application.

Client using contractERP version **2019** with NO Customizations:



Upgrade Path

- Data upgrades will need to pass through previous versions to convert to the current contractERP version.
- Re-implementation is an option but not required:**
- Best opportunity to correct adopted process flows that don't support the best use of the application.

Implementation Services:

- Upgrade / Re-implementation Decision Point
- Training, System Testing, and Process Improvements will be evaluated on a per client case
- An Implementation Budget will be submitted with the Conversion Upgrade Proposal

Help yourself!

New On-Boarding and Self-Help Enhancements within contractERP Cloud

Presenter:

Amy Gracer

Manager of Information Development

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Agenda

- 1 Guided experience for first time users
- 2 Introductory tours when you first visit a page
- 3 Help pane provides contextual assistance
- 4 contractERP Cloud Help Center



Commercial Construction Supplies | Contracts ▾ Reports ▾ Posted Documents ▾ Sales & Purchases ▾ Shop & Work Orders ▾ | ☰

Items Customers Vendors Posted Purchase Invoices

Get started

Complete the last steps to get ready for business

Skip checklist

Your checklist:

1. Intro to Contracts
2. New Contract
3. Add material
4. Create a release schedule
5. Purchase material
6. Review purchase status

Introduction to Contract Management Video

Watch a video on contractERP's contract management workflow.

⌚ 3 minutes

[▶ Play video](#) [Skip for now](#)

Activities ▾

Project Manager / Salesper... ... View Orders where you ar... ▾

Contract Sales			Contract Sales Order Shipment Status			Material Management		
Planned	In Process	Completed	Not Shipped	Partially Shipped	Past Due	Unconfirmed PO Lines	Unassociated I... Lines	Stored Material Lines
7	12	8	0	0	18	35	2	0

Non-Contract Sales			Alerts	Admin Tasks	
Sales Quotes	Sales Orders	SO Past Req. Date	# Lines Past Due	My Open Tasks	My Tasks Due ... 14 Days
0	27	27	0	0	0

Guided Experience

- Role-based
- Full workflow
- Customizable

Configurator Setup

Search + New Manage Card Items Dynamic Description

No.	Description	Make to Stock	Type	Item Category Code ↓	Product Group Code	Primary Attribute Code	Primary Attribute Value
RCWINDOW	REPLACEMENT WINDOW...	<input type="checkbox"/>	Item Search	WINDOW	MATERIAL		
WD FRAME	WD FRAME	<input type="checkbox"/>	Item Search	WD FRAME	WDFOTH		
			Item Search	WD DOOR	PREHUNG		
			Item Search	STOREFRONT	MATERIAL		
			Item Search	ST	STRACK		
			Item Search	SS	SSTUD		
			Item Search	INSTALL	INSTALL		
			Item Search	HM FRAME	HMFCHJ		
			Item Search	HM FRAME	HMFCHD		

About the configurator list ✕

The contractERP Configurator allows you to simplify the production of products that are custom configured or built for each customer order. Using the Configurator, you can create a parent product or work order, and then assign the items and labor that comprise it. For each item, you can assign a number of attributes that define it.

[Learn more](#) [Take a tour](#)

Teaching Tips and Tours

Introduction to each page to increase your chance of success.

- What is this page about?
- What can I do with this page?
- Where can I learn more?

Hi! How can we help?

Search

SEARCH

contractERP is the Microsoft Dynamics 365 Business Central solution for originating, managing, and billing projects on a contract basis for the construction material and equipment supply industry.

Registration open for our User Conference June 13-15, 2022
View the [agenda](#) and [Register Now!](#)



General Information

Latest announcements and what's new in contractERP



contractERP Academy

Visit the Academy and learn how to use contractERP



Ask the community

Trade ideas with peer experts and request features

Demo

Front-end Estimating and Detailing Software Integrations

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Commercial Door and Hardware:

- eMullion – ePWS
- TOAD – Web Configurator
- ASSA ABLOY – Protech
- ASSA ABLOY – Titan
- ASSA ABLOY – Product Selector
- Software 4 Hardware
- Avaware

Systems/Security Integrator:

- *Upcoming integration: D-Tools*

Window/Door Manufactures:

- Soft Tech – V6
- *Future integration: FeneVision*

Contract Glazier:

- Orgadata - LogiKal

Getting The Most From This Event!

Tuesday's Sessions:

- 10:30-11:30**
- contractERP WMS (Warehouse Management System) with Mobile App**
- Every business depends on accuracy, accountability and efficiency to improve as a business: this is no exception in the back warehouse and shop floor. In this session, we'll provide a firsthand demonstration of contractERP's WMS solution with mobile warehousing, as well as discuss the future direction of this game-changing feature set for contractERP.
-
- 12:30 - 1:30**
- Contract Material Services**
- contractERP Material Services is functionality to properly align services that need to be performed to contract material requirements that are *not* traditional shop fabrication tasks. Material Services may include pre-installed hardware, painting, or field installation defined by material item. This session will walk you through contractERP's Contract Material Services with real-world examples.
-
- 1:30 - 2:30**
- Labor Work Orders, Time Entry & Payroll Requirements (such as Certified Payroll Reporting)**
- This session will take you through all contractERP functionality related to planning, scheduling, recording, and posting of labor tasks. We'll run through the process including visually scheduling resources and using the field app to view, record and submit time in the field.
-
- 2:45 - 3:20**
- cERP Docs: Document Management within contractERP**
- Get a real-world view of document management inside contractERP, including AP/AR document management workflow; how your operations teams can use cERP Docs for contracts and sales orders; and finally, how you can use cERP Docs to create an automated approval workflow for transactions such as PO Approval and tax-exempt sales.
-
- 3:25 - 4:05**
- Capacity & Delivery Scheduling Boards**
- This session will take you through the workflow and end user experience of contractERP's two capacity-based scheduling boards. Capacity Planning assists in scheduling Shop Work or inside labor tasks such as Material Services (Pre-install as an example), and the Delivery Scheduler will assist you planning out which orders are going out on which trucks, on a selected route/day.
-
- 4:10 - 4:45**
- contractERP Configurator**
- We will review the contractERP configurator, new features within it, and real-world best practices where it should be used.

Tuesday Evening:

Punch Bowl Social. Dinner, drinks, karaoke, games and lots of fun!

W
up

Above all, take the opportunity to co-mingle with your industry colleagues and the contractERP Team!!

Thank You!