



One Window

MANY CAPABILITIES

GROUP PROFILE



RAMA Profile

•	About Us	<u>04</u>
	Leadership	. <u>05</u>

- Team.....<u>06</u>
- Why RAMA.....<u>07-10</u>
- Services.....11-12

Microsoft Dynamics 365

- Dynamics 365 General Features.....14
- Dynamics 365 2 Major Services.....15
- Dynamics 365 BC Capabilities......16
- Dynamics 365 FnO Capabilities......18
- Dynamics 365 CRM.....20

Microsoft Power Platform

- Power Platform.....24
- Power BI Dashboards......26
- Power Automate......29
- Power Apps......30
- Power Virtual Agents......31
- Power Copilot Studio......32

<u>Azure</u>

- Snapshots.....<u>36</u>

Certified Partner for:

















RAMA Profile

RAMA Group (Ram Agarwal & Associates, CA Firm + RAMA Corporate & IT Solutions & LLP) is an enriched and highly experienced IT consulting firm with technology partnerships with Microsoft, Spine, Automation Edge, Finalyzer to provide implementation, support, upgrade, migration services for their products in its boutique.

■ RAMA Group has a professional resource team of 175+ people, with 50+ resources dedicated in providing quality ERP & IT services to across industries such as Food and Beverage, Restaurants, Entertainment, BFSI, Manufacturing, FMCG, Pharmaceuticals, Textiles, Real Estate, Infrastructure, and Oil & Gas.

Headquartered in Mumbai and another offices at Dubai in UAE and Hyderabad in India, RAMA Group has served about 200+ Mid to Large size corporate clients across industries, under all its service verticals.

Focused Service Areas

- ✓ ERP Implementations
- ✓ Upgrades, Migrations & Rollouts
- ✓ Data Analytics (Power BI Implementations)
- ✓ Robotic Process Automation (RPA)
- ✓ Indirect Tax (GST & VAT) Consulting
- ✓ IT Network & Data Security Audit
- ✓ SOP Design and Documentations
- ✓ Process Reviews & Re-engineering

15+

Cities - Clients served in Asia, GCC, Africa, US & Europe 15+

Ultra large group and MNCs clients served

175+

Total Resource team

50+

team of techno-functional ERP / systems consultants



Ram Agarwal - FCA
Founder & Managing Partner
(IA, ERP & Business Advisory Services)

Ram, with nearly 25 years of comprehensive experience, leads the organization, spearheading business development, serving as the key figure in quality assurance, and possessing expertise in Risk Advisory & Management Assurance, Corporate Finance, Business Advisory, and ERP Implementation services.



Manish Patil- BE, MBA VP — Strategy & Consulting

With over 15 years of experience in business development, sales, and consulting, Manish is a strategic leader and specializes in driving growth through innovative strategies, channel partnerships, and enterprise technology transformation. His expertise spans SAP, Oracle, and Microsoft Dynamics, and now extends to Al-powered solutions, including generative Al agents, predictive analytics, and cloudnative platforms. Passionate about solving complex business challenges, he focuses on delivering client value and sustainable growth by aligning emerging technologies with business strategy.



Samit Mallick-MCA
MCP Certified (Navision, Business
Central, LSR)
Associate Director
(FnO | Business Central | Power BI)

15+ years of experience Samit is the brain behind understanding and mapping critical & complex business processes into the ERP with industry best standards.



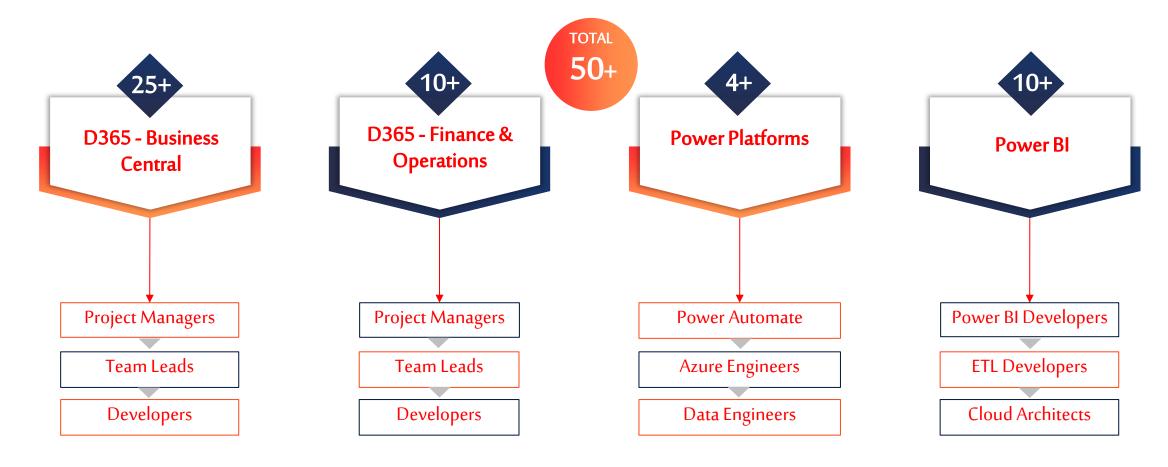
Mahesh Kavathekar- B.COM Solution Architect— Microsoft Dynamics Practice

With 11+ years of experience as a Functional Consultant, Mahesh specializes in MS Dynamics Business Central, D365 F&O (Finance), and Navision, with expertise in ERP implementation, go-live support, and key user training.



Ashok Thakur- MBA IT Head & ERP Project Manager

With 12+ years of experience, Ashok excels in overseeing project execution, ensuring timely delivery, and maintaining quality standards. Experienced in leading crossfunctional teams, ensuring IT compliance, and optimizing enterprise solutions across industries.



> Proficient Data Analytics team compromising of BI developer, UI/UX, ETL

> IT and Azure Cloud Architects

Qualification Index

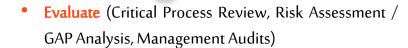
- > Multi Field Qualified Senior Team CAs, MBAs, IT (B. Tech / M Tech) and PMP
- > Mid Level Team IT (B. Tech / M Tech), MCA, PMP, Prince2 and ITIL

- Microsoft Certified Professionals
- > Qualified DBA (Database Administration)
- CCNA (Cisco Certified Network Associates) & CCNP (Cisco Certified Network Professional)

Business Process Management

Technology

Compliance



- Build (SOPs, Risk & Controls Matrix, Internal Controls Framework, CCM, ERM etc.)
- Strengthen (Cost Optimization, Profit Improvement Studies, Increase Process Efficiencies Time/Cost)
- Automate (Digital Transformation using ERP, BI, RPA, IoT, IIoT, Data Analytics etc.)
- Improve (Assist in Implementing Recommendations
 & Establishing Framework for Periodic Reviews)
- Transfer Business Process on models like Build Own Operate (BOO) and Build Own Transfer (BOT)

- Microsoft Partner to implement, upgrade, manage & support MS products like Dynamics 365 (Business Central, AX, Navision, CRM, Power BI etc.)
- Partners with product companies to manage functions like MIS Reporting, Mgt. Dashboards, HR, Automated AP, AR, Reconciliations etc.
- ERP Consulting to identify apt ERP Product & Implementation Partner, Review existing ERP to Enhance Utilization, Integrate with other software etc.
- **ERP Project Management** preparing Functional Requirement Documents (FRDs), Perform UAT, etc.
- Process Automation Solutions using Emerging Technologies like Robotic Process Automation, IoT, IIoT etc.

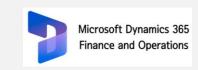
- Indirect Tax Compliance in UAE and India (GST and UAE VAT)
- Direct Tax and Corporate compliance in India (Income tax, ROC filing, returns & assessment)
- Structuring of **Business Transactions**
- Assistance in Accounting and Audits
- Transaction advisory and due diligence
- Fraud Risk Management and investigation

















the objectives

Interactive discussion with

consideration to practical

with the help of existing

operations team & due

business scenarios

with stakeholders



Apt Business Understanding



Quick Resolution to Specific Problems



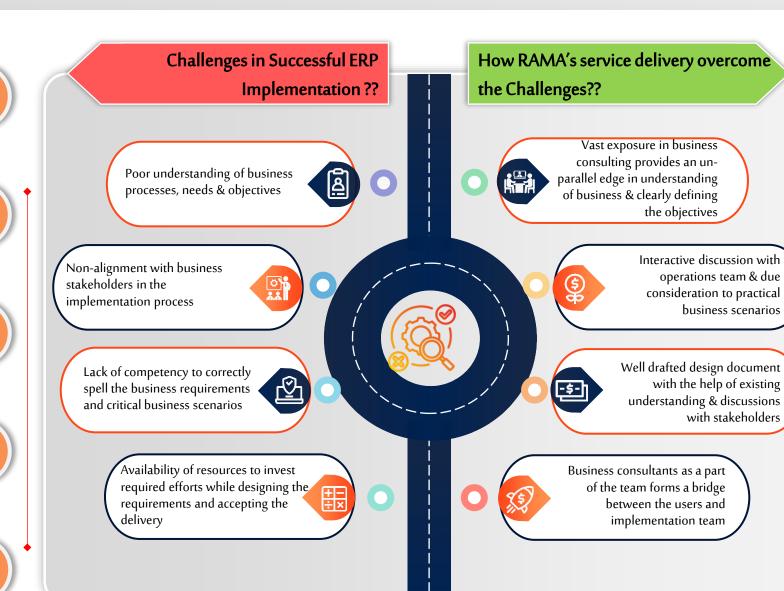
Best Combination of Consultants



Satisfactory & Successful Implementations



Project Ownership & Responsibility





stakeholders for

concurrence

the implementation

and optimum

utilization

RAMA's Team Structure for **ERP Services Functional** Project In-charge Consultant (Senior team member / Business (Expert Knowledge on Product) Consultant) **Technical** Consultant (Expert Knowledge on Technology) Objective Alignment of Business and Process through ERP **Implementation**

"Greenfield" ERP Implementation

- Business Case for ERP Implementation
- Evaluation and Selection of Suitable Products
- ERP Project Management (including project governance framework)
- Business Process Re-engineering & Requirement Study
- Identifying Gaps between Requirements and System Capabilities
- Providing Solutions through Configuration / Customisation
- Development as per Agreed Solutions
- Independent Verification and Validation (UAT)
- Defining cutover and data migration strategy
- Training and handholding of process owners

ERP Support & Migration Services

- Change Management
- Troubleshooting
- Migration/Upgrades
- Enhancements & Improvements
- Development of Reports

ERP Product & Vendor Evaluations

- Business Requirement Study
- Identification of Suitable Products
- Drafting of RFPs
- Demo Scripts for Product Evaluation
- Software's functional strengths & weaknesses relative to business



 Negotiation & Finalization of Contract with Vendor

ERP Post Implementation Reviews

- Cost Vs. Returns
- System Vs. Business Processes
- Scope Completion Evaluation
- Implementation and Data Migration
- Effective control framework-built processes
- Integration of ERP with other systems / BI Tools
- Efficient maintenance of accounting records
- Requirements related to financial statements

ERP Implementation Assistance

- Project Governance Framework
- Business Process Re-engineering and Requirement Study
- Identifying Gaps between Requirements and System Capabilities
- Providing Solutions through Configuration / Customisation
- Development as per Agreed Solutions
- Independent Verification and Validation (UAT)

► IT Network & Data Security Audit

- Review of the security mechanisms configured
- Evaluation of possible exposures to unauthorized network connections
- Review of router configuration and logging procedures
- Disaster recovery procedures for the firewall and OS



Penetration test

Microsoft Dynamics 365

Business Central



Microsoft Dynamics 365 Finance and Operations



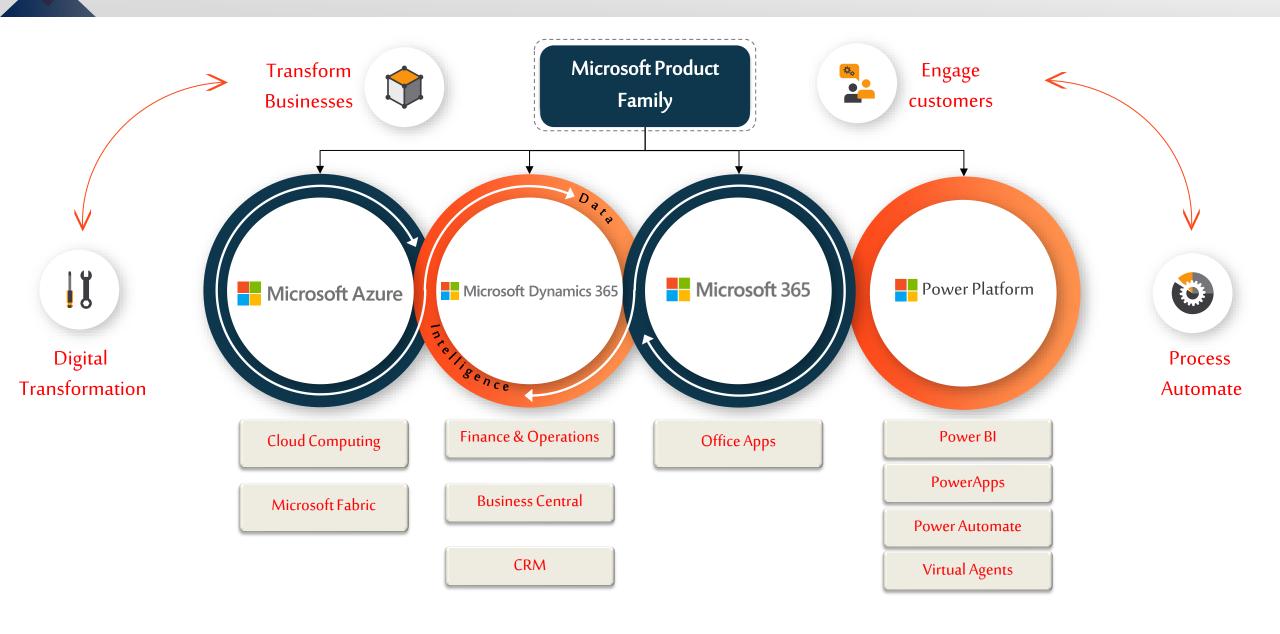














Microsoft Dynamics 365

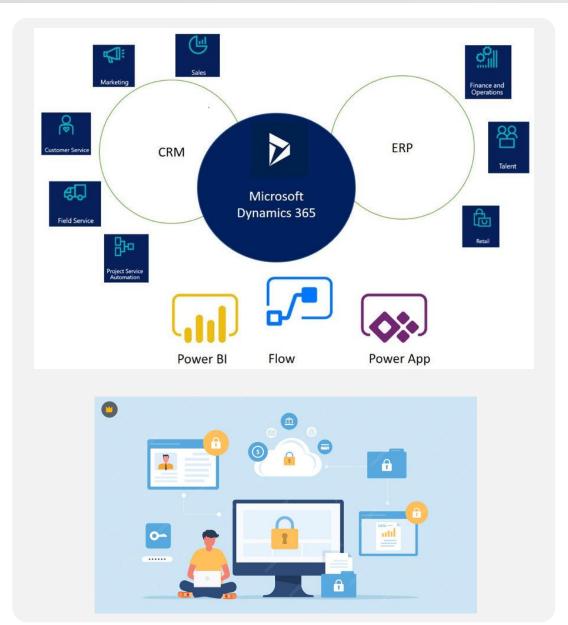
DYNAMICS 365

General Features

Dynamics 365 ERP Solutions — Choosing the Right Fit

- Unified ERP & CRM across Finance, Supply Chain, Sales & Service
- Real-time insights with **embedded AI & analytics**
- Tailored industry solutions: Mining, Manufacturing, Retail, Healthcare, BFSI
- Al-driven forecasting for smarter planning & resource optimization
- **Connected experiences** break silos, enhance collaboration
- Low-code/No-code flexibility with Microsoft Power Platform
- End-to-end visibility & automation for data-driven decision-making
- Built-in compliance, security & global standards
- Anywhere, any device access for modern workforces
- Seamless integration with Microsoft 365, Teams, Outlook, Power BI, Azure
- Cloud-based & scalable grow at your pace
- Continuous innovation with Microsoft's regular Al & feature updates





Business Central

- All-in-one ERP: Finance, Supply Chain, Sales, Service, Projects & Operations
- Designed for all type of Enterprises except large, voluminous & complex industries
- Seamless integration with Microsoft 365, Teams, Power BI, and Power Platform
- Flexible deployment Cloud, On-Premises, or Hybrid
- Al-driven insights for smarter decisions
- Industry adaptable Manufacturing, Trading, Retail, Services, etc.
- Scales as your business grows without costly migrations
- Role-based dashboards & improved productivity
- Compliance & localization for multiple countries
- Secured with Microsoft's enterprise-grade protection



Finance & Operations

- Enterprise-grade ERP for large, multi-entity, global organizations
- Built for complex enterprises with high transaction volumes
- Deep integration with Azure, Power Platform & Microsoft ecosystem
- Cloud-first, enterprise-scale deployment
- Embedded AI, ML & predictive analytics
- Advanced manufacturing, supply chain, logistics & procurement
- Handles thousands of users & enterprise-wide scalability
- Advanced financial consolidation, compliance & reporting
- Global trade, multi-currency, multi-country compliance
- Enterprise-grade Microsoft security with global reach



Operations





Microsoft **Dynamics 365** for Finance and **Operations**









Finance and Accounting

- General Ledger
- Unlimited Dimensions
- Multiple currencies
- Multiple companies
- Budget

- Financial reporting
- Consolidation
- Intercompany postings
- Statistical accounts
- Cash flow forecast

- Fixed assets
- Cost accounting
- Deferrals
- Electronic payments/direct debits
- Customer payment process

- Late payment prediction
- Bank account reconciliation
- Bank account management
- Check writing



Sales and Marketing

- Marketing text suggestions
- Contact management
- · Campaign management
- Interaction and email logging
- Opportunity management
- Dynamics 365 Sales integration



Fulfillment and Delivery

- Sales invoicing
- Sales order management
- Sales line and invoice discounting
- Campaign pricing
- Returns and exchanges
- Dynamics 365 Customer Service integration



Purchasing and Payables

- Purchase invoicing
- Purchase order management
- Purchase return order management
- Alternative order addresses
- Purchase invoice discounts



Inventory

- Inventory control
- Item categories and attributes
- Item tracking
- Multiple locations
- Location transfers



Supply Planning and Availability

- Supply planning
- Demand forecasting
- Sales and inventory forecasting
- Order promising
- Calendars



Project Management

- Basic resources
- Capacity management
- Multiple costs
- Projects
- Time sheets



Service Management*

- Planning and dispatching
- Service contract management
- Service item management
- Service order management
- Service price management
- Dynamics 365 Field Service integration



Warehouse management

- Bin Tracking
- Inventory picks and put-aways
- Warehouse receipt
- Warehouse shipment

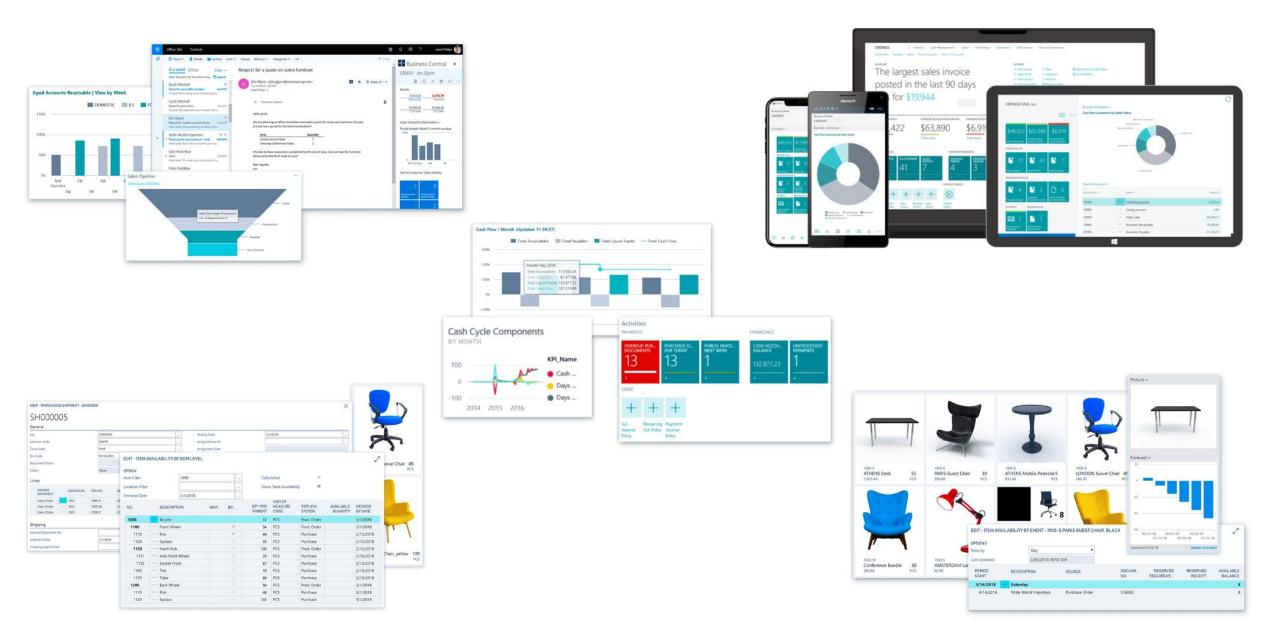


Manufacturing*

- Assembly management
- Standard cost worksheet
- Production bill of materials
- Basic capacity planning
- Machine centers
- Version management



MICROSOFT DYNAMICS 365 BUSINESS CENTRAL





Financial Management

- General Ledger
- Account receivable & payable
- Bank management
- Fixed Assets
- Intercompany Accounting & Consolidation
- Budget Planning & Control



Manufacturing Mgmt.

- Lean, Discrete & Process Manufacturing
- Capacity Planning & MRP
- Job Scheduling
- Shop Floor Management
- Production Control
- Compare Actual Costing
- Sub-Contracted Work
- Rework Management



Sales & Marketing

Sales force & Marketing Automation

- Lead & Opportunity
- Telemarketing and Tele sales
- Quotation
- Trade Agreement
- Sales Management
- Customer Rebate
- Broker & Royalty



Supply Chain Mgmt.

- Product Item Hierarchy (Barcode, Size, Style, Color...)
- Demand Forecasting
- Intercompany Trade
- Inventory Management
- Warehouse Advanced
- Transportation Mgmt.
- Quality Control



Procurement & Sourcing

- RFQs: Scoring Criteria, Compare Quotes, Vendor Approval
- Centralize PR Workflow approval
- PO Workflow Approval
- Vendor Rebate
- Vendor Performance



Compliance Management

- Workspaces
- · Audit trails and access control
- Business Workflow Approval (42 Out-of-Box)
- Security Record level
- Alert & Notification



Business Intelligence & Reporting

- Excel integration
- Embedded Analytics
- Reporting Services
- Power BI Integration

Collaborative Workspace

- Vendor Collaboration
- Employee Self Service



Retail & POS

- Call Center for Sales
- Replenishment
- Pricing, Discount, Promotion
- Loyalty Management
- Multi-payment
- E-commerce & Mobile



Human Resource

- Organization/Department / Position Hierarchy
- Recruitment
- Training
- Employee Profile
- Compensations & Benefits
- · Personal Development
- Time & Attendance
- Payroll



Project Mgmt. & Accounting

• Financial Report Designer

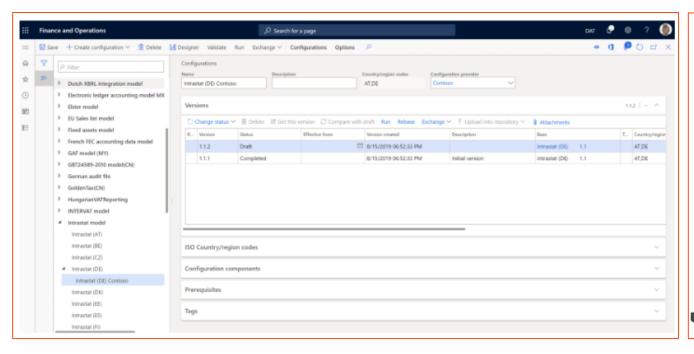
- Compare Budget vs Actual
- Project Cost Control
- Revenue Recognition & WIP
- Integration with other Modules
- Integration with MS Project

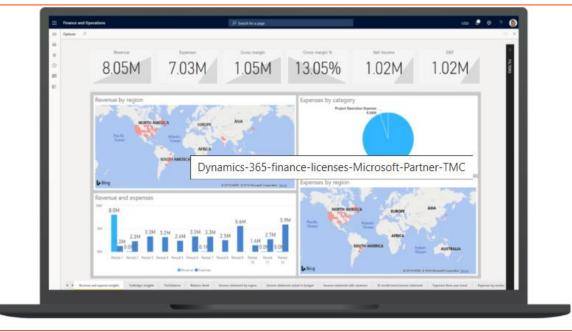


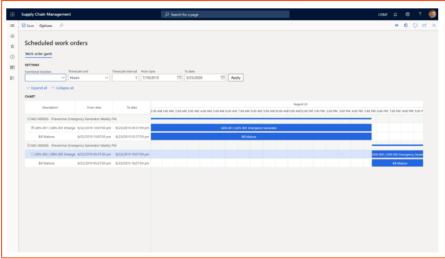
Service Management

- Case management
- Service Orders & Contracts
- Service Calls & Dispatching
- Repair Management
- Service Subscription

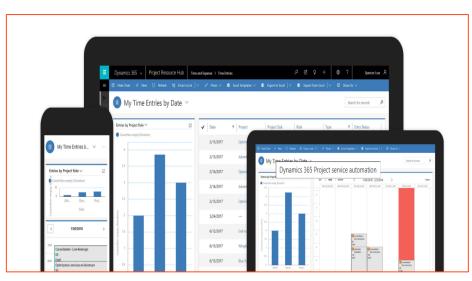
MICROSOFT DYNAMICS 365 FINANCE & OPERATIONS











MICROSOFT DYNAMICS 365 CUSTOMER ENGAGEMENT (CRM)

Unified business applications driving efficiency, growth, and innovation.

- **360° Customer View** Centralized customer data across sales, marketing, and service
- Sales Acceleration Automate lead nurturing, opportunity tracking, and forecasting
- Al-Powered Insights Predict customer needs, recommend next best actions, and improve win rates
- Seamless Microsoft Integration Works natively with Outlook, Teams, LinkedIn Sales Navigator, Power BI, and Power Platform
- Customer Service Excellence Omnichannel support (chat, voice, email, social) with intelligent case routing
- Marketing Automation Targeted campaigns, customer journeys, and ROI tracking
- Field Service Management Schedule resources, optimize routes, and enable mobile field agents
- Scalable & Flexible Modular apps (Sales, Customer Service, Marketing, Field Service) tailored to business needs
- Anywhere, Anytime Access Mobile-ready CRM with real-time data and offline support
- Enterprise-Grade Security Microsoft Cloud security with role-based access, compliance, and data protection

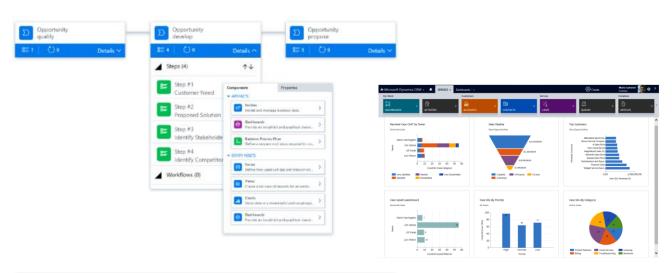


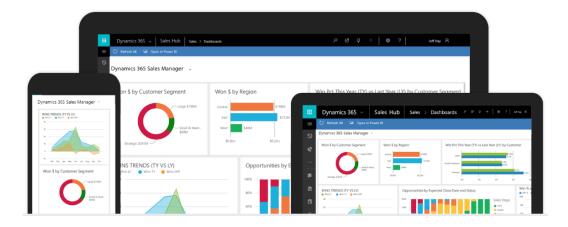


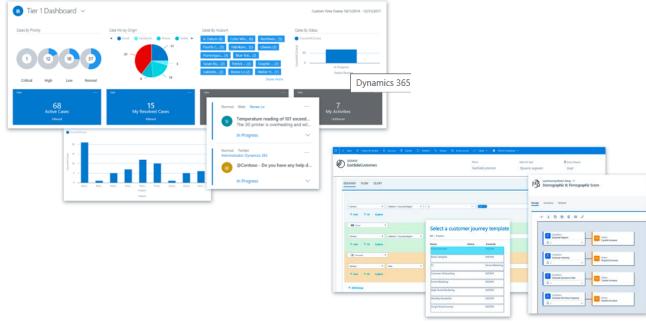
Dynamics 365 Customer Engagement (CRM) Capabilities

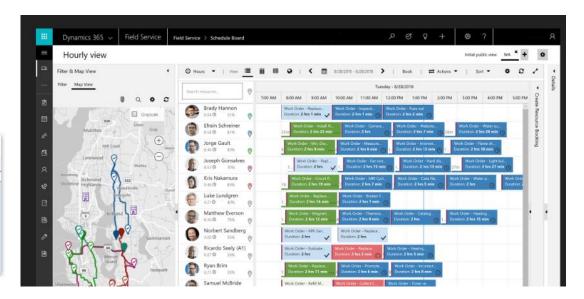
Sales	Lead, Opportunity, Account, Contact Management	Product & Price Listing	Quotes, Order and Invoices	Reports & Dashboard	pipeline intelligence	Copilot capabilities in Dynamics 365 Sales	Advanced sales engagement
Customer Services	Omni Channel	customer journeys and campaigns	Embedded Analytics	Knowledge Management	Data Insights	Account Management	Al Copilot
Customer Insights	Data Enrichment	Event Management	Profile search & Discovery	Customer cards	Business Measures	Power Platform Connectors	Analytics & AI
Field Service	contract & SLA management	Work order management	Service request management	Resource Scheduling & Dispatch	Mobile Field service App	Technician performance analysis	Al assistance from Copilot
Contact Center	Self service	Digital channel	Voice channel	Service representative experiences with Copilot	Integrations and analytics		

MICROSOFT DYNAMICS 365 CUSTOMER ENGAGEMENT (CRM)





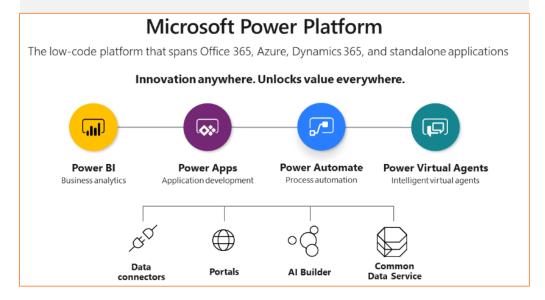




Microsoft Power Platform

Power Platform: Low-Code, High Impact

- Empower your teams with Microsoft's Power Platform a unified suite to analyze, act, and automate
- Build apps, automate workflows, create chatbots, and gain insights – all without deep coding expertise
- Connect seamlessly with Microsoft 365, Dynamics 365, and Azure
- Secure, scalable, and built on Microsoft's trusted cloud





Create Al-powered chatbots

to improve customer service

and engagement.

Gain real-time insights through

powerful data visualization and

analytics tools.

Data

Insights

Apps

Automation

Engagement

Power BI

(From Data to Decisions)

- Real-time data analytics and reporting.
- Interactive dashboards for 360° business visibility.
- Predictive and Al-driven reporting.
- Seamless integration with Microsoft 365 & Dynamics 365.

Power Apps

(Build Without Code)

- Low-code/no-code app development.
- Digitize manual and paper-based processes.
- Mobile-ready apps for employees on the go.
- Connect with 400+ data sources & systems.

Power Automate

(Work Smarter)

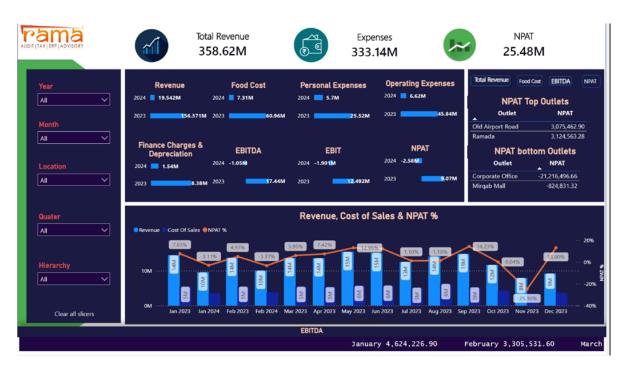
- Automate repetitive, time-consuming tasks.
- Al-powered process automation.
- Integrate workflows across multiple applications.
- Reduce human errors & improve efficiency.

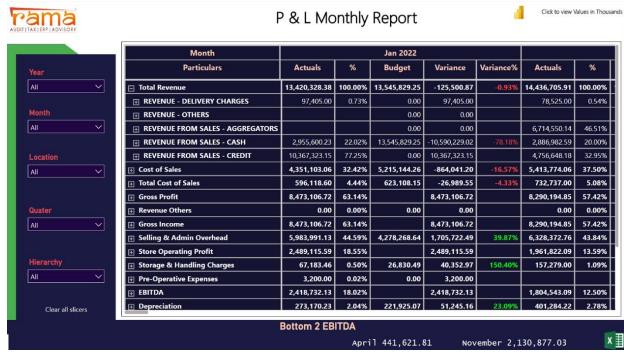
Power Virtual Agents

(Al at Your Service)

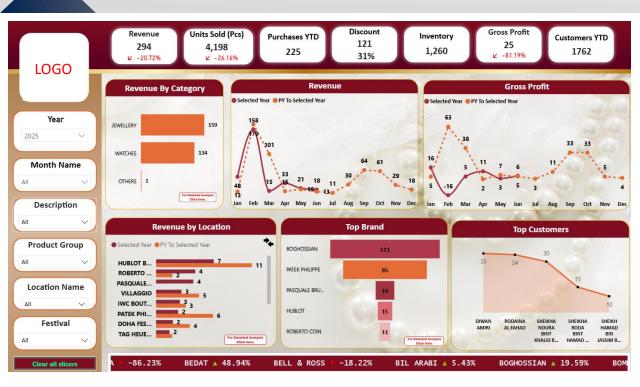
- Build no-code Al-driven chatbots.
- Handle FAQs, employee queries & support tickets.
- 24/7 availability for faster customer engagement.
- Integrates with Microsoft Teams & third-party apps.

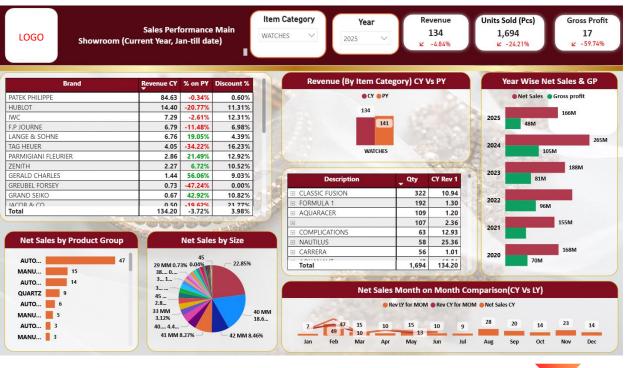
POWER BI Finance Dashboards



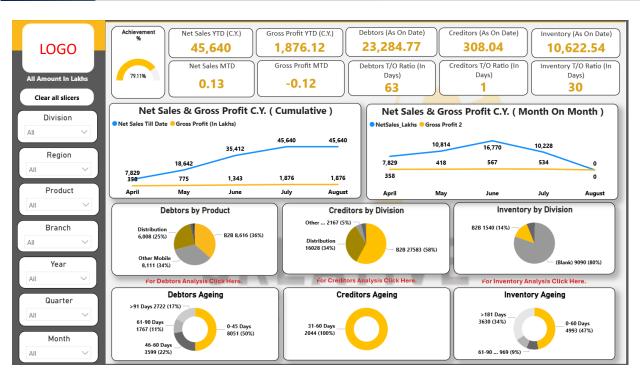


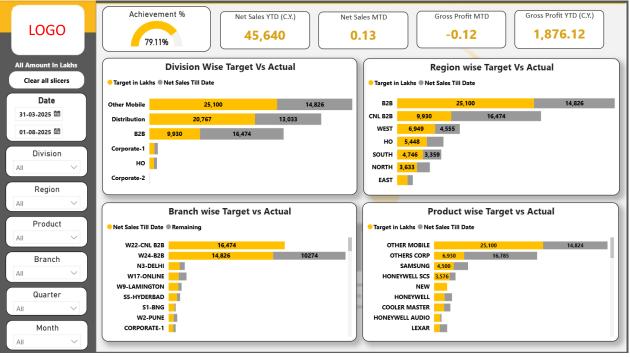
POWER BI Sales Dashboard



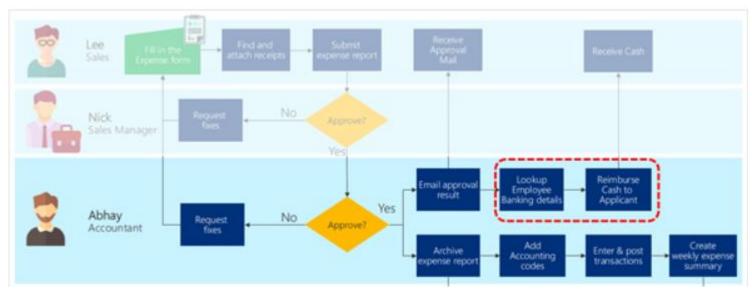


POWER BI Sales Dashboard

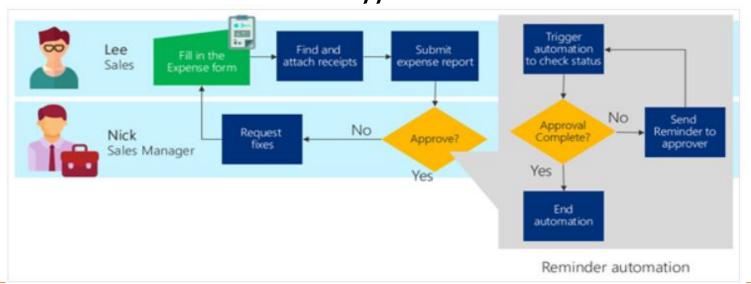




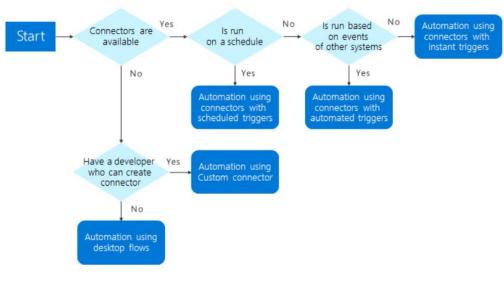
Reduce human error

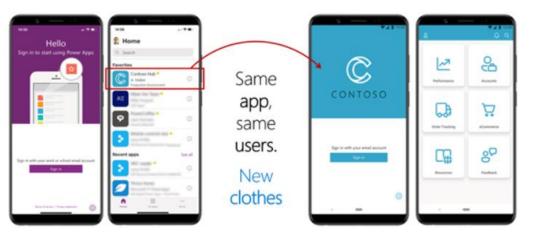


Streamline approvals

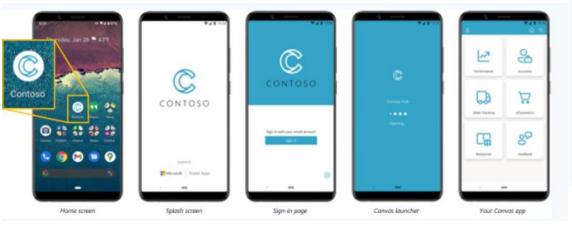


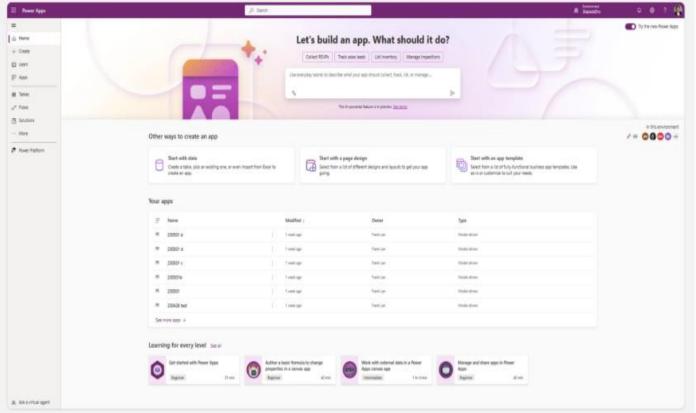
Decision-making flowchart for your design



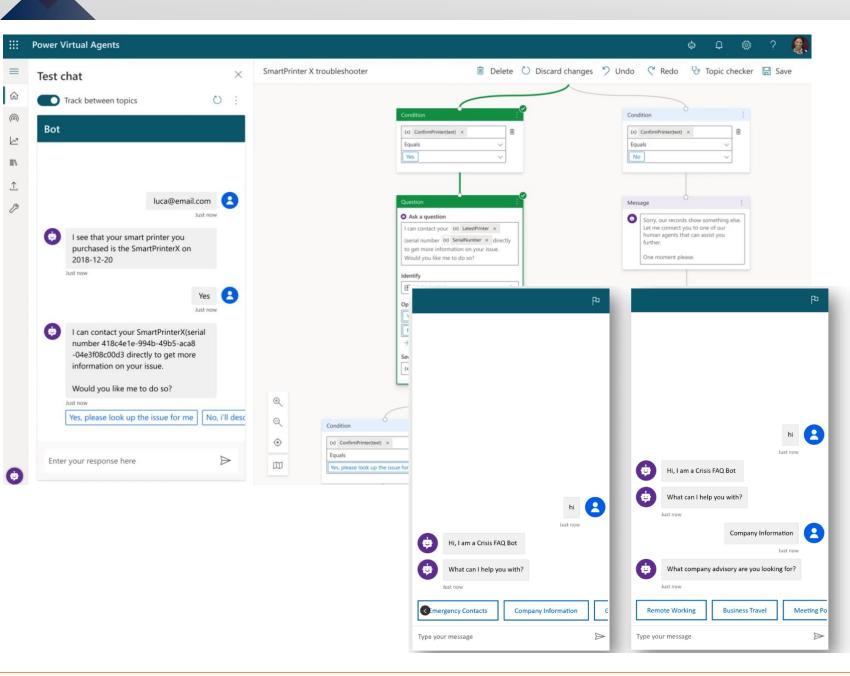


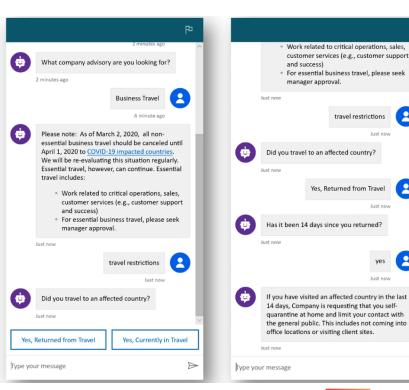
Seamless end-to-end branding





POWER VIRTUAL AGENTS

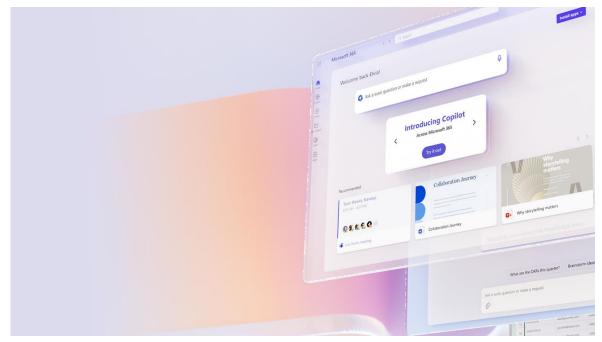




Microsoft Copilot Studio – Create Your Own Al Assistants

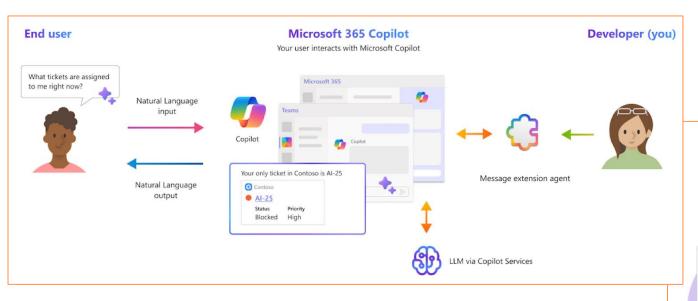
- No-Code/Low-Code AI Assistant Builder Easily design, customize, and deploy AI copilots without complex coding.
- Seamless Integration Connect with Microsoft 365, Dynamics 365, Power Platform, and third-party apps.
- Custom Workflows Automate routine tasks, handle FAQs, and streamline business processes with tailored copilots.

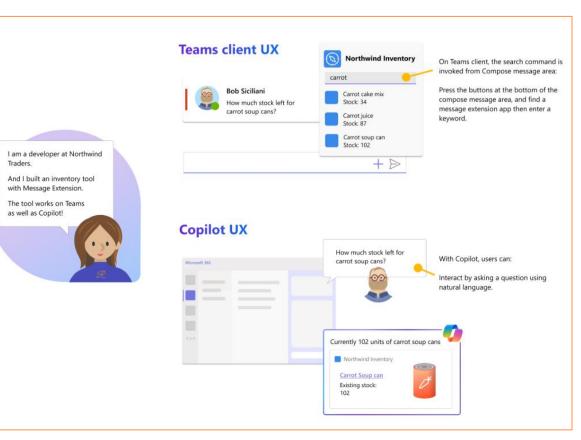




- Conversational Intelligence Build Al-driven assistants that understand natural language and deliver contextual responses.
- Scalable & Secure Enterprise-grade security, governance, and compliance built on Azure.







Azure

Secure, Scalable & Intelligent Cloud Solutions

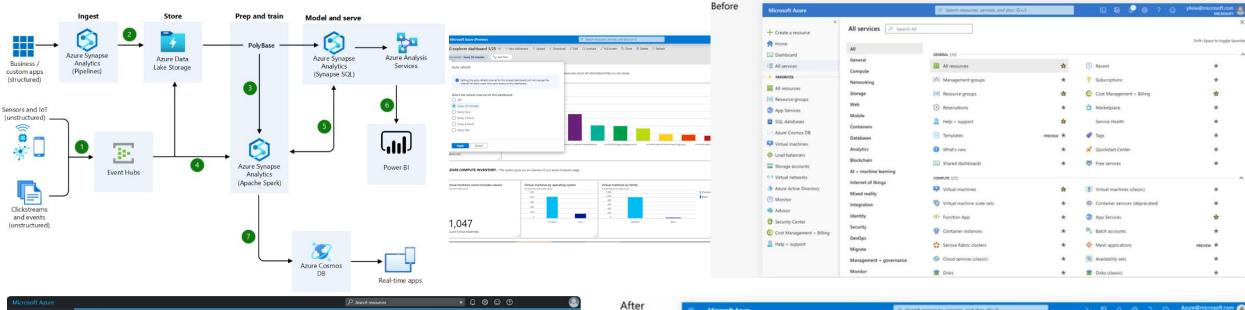
- Comprehensive Cloud Services (laaS, PaaS, SaaS): Build, deploy, and manage applications seamlessly across infrastructure, platforms, and software services.
- Al & Data Innovation: Leverage advanced Al, machine learning, and analytics to unlock insights, automate processes, and drive smarter business decisions.
- Enterprise-Grade Security: Benefit from built-in global security solutions with Microsoft Defender and Sentinel for proactive threat detection and compliance.



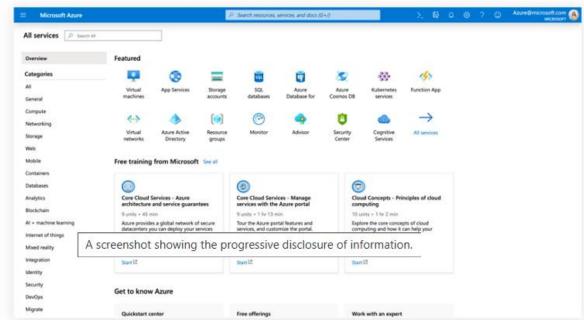




- Hybrid & Multi-Cloud Flexibility: Integrate on-premises, private, and public cloud environments with ease while maintaining governance and compliance.
- **Cost Efficiency:** Optimize IT spending with flexible, pay-as-you-go and reserved cloud consumption models.







CONTACTS

Ram Agarwal

Founder & Managing Partner

M: +91 93240 22233

Email: ram@rama.co.in

Manish Patil

VP - Strategy & Consulting (IT & ERP)

M: +91 98909 72111

Email: manish.patil@rama.co.in

Menka Yadav

Client Partner — (IT & ERP)

M: +91 87795 58025

Email: menka.yadav@rama.co.in



Mumbai H.O. –

Unit 607 & 512, A Wing, Express Zone, Western Express

Highway, VIT Bhatti, Malad East, Mumbai- 400097



Hyderabad Branch Office —

Cowork Zone, 4th Floor, Cabin No:7, Opposite Lane of

Harley Davidson Showroom, Madhapur, Kavuri Hills,

Hyderabad - 500033



Dubai Office- RAMA LLC

M-01, Bank Street Building, Khaled Bin Waleed Road,

Dubai, UAE

OUR PRESENCE: KSA-BAHRAIN

Phone: 022 4960 2734 / 022 4960 9734

Visit us at: www.ramaerp.in / www.rama.co.in

Email: info@rama.co.in







