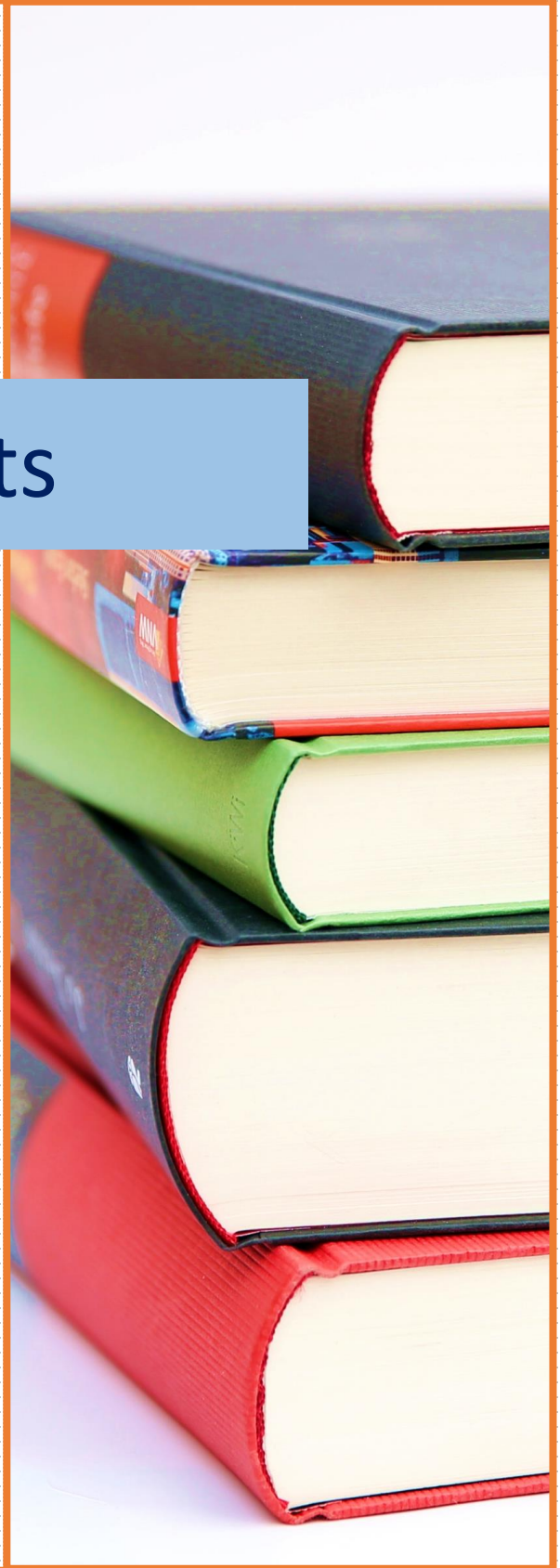


# 27 Powerful Questions to Ask ERP Providers



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# Who is WebSan Solutions?

Located in the Greater Toronto Area, WebSan Solutions Inc. is a Microsoft Dynamics Certified Partner and IT consulting and solutions provider. As the Largest Hosting Provider for Microsoft Dynamics in Canada, and with over a decade of experience in Enterprise Software solutions, online business and financial accounting software, the experts at WebSan know how to help you transform your business.

*“As a customer, you're more likely to return or make a repeat purchase when you've experienced first class customer service. It's because of WebSan's high quality customer service standards that they have experienced significant growth over the past few years, and also why they are a winner in this award category.”*

*-Allan O'Dette, President and CEO of the Ontario Chamber of Commerce*

**Ontario Business Achievement Award  
Winner for Service Excellence**

[Read More About Us](#)



# Business Opportunity Questions

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1. What is our greatest opportunity to improve efficiency and how will your software assist with it?
2. How will your software help us make better business decisions?
3. How do I know that Microsoft Dynamics is right for my company?
4. What's the difference between on premise and hosted?

What is our greatest opportunity to improve efficiency and how will your software assist with it?

Microsoft Dynamics can help your business improve efficiency by:

- Delivering comprehensive out-of-the-box business management functionality – from financials to sales to business intelligence (Power BI)
- Adding or removing users as your business needs change
- Delivering the information you need to monitor business performance from every possible angle and capitalize on new opportunities
- Improving ROI is achieved due to the system's ability to accommodate growth while delivering the insight you need to respond quickly to changes
- Optimizing buying and inventory management to cut costs

Automation results in faster communication of objectives, strategies, and goals across all departments. With automation in place, time that is being saved can now be allocated to other priorities.

## How will your software help us make better business decisions?

Microsoft Dynamics is an all in one solution that allows owners more control over their business. Owners can see a front-to-end view of their business and see exactly where there is a need for improvement.

- Microsoft Dynamics provides information for owners to analyze their business and see where it can be improved.
- Gain the ability to analyze what processes can be altered to become more automated, efficient and effective.
- Microsoft Dynamics will make any business scalable for any future development.
- Obtain more control over the business and make better decisions, resulting in a more profitable business.

Microsoft Dynamics offers a unique combination of financial management, business intelligence, collaboration and communication tools embedded across your core business processes. By choosing Microsoft Dynamics, you will increase your margins, improve your cash flow and ultimately drive your business growth.

How do I know that  
Microsoft Dynamics is right  
for my company?

We have a free ERP Assessment that aims to determine how your organization is using your current ERP software and identify opportunities for generating additional value from the software investment.

[Take our Free Assessment](#)

What's the difference  
between on premise and  
hosted?

It's important to consider the hidden costs involved in implementing and maintaining your business software solutions. With our simplified pricing plan, we make it easy for you to make your decision.

[On-Premise vs. Hosted](#)



# Security Risk Questions

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1. How do we ensure users can access only approved areas and functionality within the software?
2. For any remote access (including cloud based deployments), what security protocols are used to protect data outside of our network?
3. Does your software easily allow for frequent data back-up?
4. What is WebSan's service level SLA for uptime?
5. Do we own all of our data?



How do we ensure users can access only approved areas and functionality within the software?

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WebSan has the option to enable location based access in which you can restrict access for all or some users to certain locations.

For any remote access (including cloud based deployments), what security protocols are used to protect data outside of our network?

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The data is hosted in a secure, SAS 70 (SSAE16) Certified, Tier II data center located in Toronto, with a second disaster recovery facility. This enables us to restore our Client systems to any point in time.

Does your software easily  
allow for frequent data  
back-up?

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Data is backed up every 30 minutes off-site via secure internet connection to a 3rdparty disaster recovery facility.

What is WebSan's  
service level SLA for  
uptime?

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Contractually, all of our Clients have a 99.95% uptime guarantee. This year we have a better than 99.99999 uptime performance. In our history of hosting Dynamics applications, we have never had unplanned downtime (knock on wood).

Do we own  
all of our  
data?

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You own the data and WebSan Solutions owns the application as well as any customizations and/or enhancements made to it. Note that CRM customizations are owned by the Customer.

[Read Our Hosting  
Service Agreement](#)



# Reference & Vendor Questions

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- [1. Can you provide me access to any community forums for current users of the proposed solution?](#)
- [2. How many clients are you currently supporting who are running the proposed software?](#)
- [3. Can I talk to an active customer running the proposed solution?](#)
- [4. Why should a customer choose to with your company rather than a competitor offering the same or similar software?](#)

Can you provide me access to any community forums for current users of the proposed solution?

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[Community Dynamics](#)

[Dynamics User Group](#)

[Customer Source](#)

[User Resource](#)

How many clients are you currently supporting who are running the proposed software?

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WebSan has worked extensively with a variety of companies in different industries. Hundreds of successful implementations combined with our relentless attention to excellence in customer service have helped us earn a reputation as an outstanding business systems solutions provider.

Can I talk to an active customer running the proposed solution?

Yes, you can! Just let us know that you would like a reference and we'd be happy to provide you with one.

[View Our Client Testimonials](#)

Why should a customer choose to with your company rather than a competitor offering the same or similar software?

- WebSan is the largest Canadian Cloud Dynamics GP Partner
- We've been in business for over 16 years
- We offer professional, practical advice and solutions from a dependable team of technology experts
- We help customers streamline and automate business processes across all functional departments

[Microsoft Dynamics 365 for Sales Implementation Plans](#)

[Microsoft Dynamics 365 Business Central Implementation Plans](#)



# Implementation Questions

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1. How long will the implementation take?

2. What implementation tasks will you handle?

3. Who will handle our implementation and what are their qualifications?

4. What happens if implementation runs long?

How long will the implementation take?

### **Microsoft Dynamics GP**

Implementation will vary based on customer needs.

### **Microsoft Dynamics 365 for Sales (CRM)**

You can get Dynamics 365 for Sales up and running in 24 hours. A typical implementation starts at 2 weeks and can go up To 6 weeks.

[Purchase Dynamics 365 for Sales](#)

### **Microsoft Dynamics 365 Business Central**

Implementation will vary based on customer needs but a typical implementation starts at 4 weeks and can go up To 16 weeks.

### **Microsoft Dynamics NAV**

Implementation will vary based on customer needs.



What implementation tasks will you handle?

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WebSan will handle the following types of support services:

- Data conversion
- Multi-Currency/Multiple Companies
- Training
- New reports or queries
- And more!

[View Our Dynamics 365 Implementation Plans](#)

[View Our CRM Implementation Plans](#)

Who will handle our implementation and what are their qualifications?

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We staff only the brightest and best in the business. That means you get professional, practical advice and solutions from a dependable team of technology experts you can trust. Our staff is qualified in various Microsoft Dynamics facets from set-up and configuration to implementation.

## What happens if implementation runs long?

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We will provide you with a change order if your company requests customizations or features outside of the scope discussed. If your company does not meet the scope requirements, you may be responsible for additional fees.

We are committed to providing your company with the best professional services available. The staff assigned to your project is testament to that commitment.



# Training & Support Questions

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- [1. Who do we call when we have problems and what's their expertise level?](#)
- [2. What type of training do you provide to your customers?](#)
- [3. Is there 24/7 tech support?](#)
- [4. What type of support services are included in the support plan?](#)
- [5. What types of support services are not included in the support plan?](#)

Who do we call when we have problems and what's their expertise level?

WebSan's Support team, with multiple decades of combined experience will assist clients with ERP and IT consulting.

They are two ways that you can submit support tickets:

1. Email [support@websan.com](mailto:support@websan.com)
2. Call our support help desk : 1-866-493-2726

What type of training do you provide to your customers?

- WebSan University is a catalogue of interactive online courses used as training. Users can access learning material such as documents, tests and videos on specific Microsoft Dynamics topics.
- WebSan's YouTube channel features recordings of our webinars, how-to videos, and training.
- Monthly webinars focus on specific Microsoft Dynamics topics and new features.

[View Our Course Catalogue](#)

[View Our Webinars](#)

Is there 24/7 tech support?

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Our normal hours of operation are 8 AM –6 PM EST. If a client requires support after hours, it just needs to be requested in advance.

[Download Our Support Brochure](#)

## What types of support services are included in the support plan?

Support plans can be used for the following types of support calls:

- Training
- New Reports or Queries
- Troubleshooting and correcting issues within Microsoft Dynamics arising from Client's use within the software's intended functionality
- Corrections to reports, screens, inquiries, configurations or other deliverables provided by WebSan during the software implementation
- Corrections to products or interfaces to/from the Client's Microsoft Dynamics product(s)
- Answers to questions by trained users regarding everyday use of Microsoft Dynamics software, or third party software installed by WebSan, WebSan reports, data conversions, modified screens, integrations and module customizations

What types of support services are not included in the support plan?

Support plans do not include the following (all must be quoted and invoiced separately):

- New screen modifications
- New customizations or interfaces
- Fixing reports, queries, screen modifications, customizations or interfaces changed by the customer or if your system environment changed from installation
- Reinstalling or configuring applications and databases due to Client hardware failure
- Process improvements or analysis
- Implementation or installation of additional module functionality currently not in use



# Scalability & Future Questions

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1. How do we add users to the system and what costs are involved?
2. What additional modules for the software are available that we might choose to license in the future?
3. What about updates to the system? Are there any fees for an upgrade?
4. What kind of add-ons does WebSan have?
5. How does your solution improve ability to scale?



How do we add users to the system and what costs are involved?

The individual who is authorized to place support tickets with WebSan on behalf of the Client can fill out the “Request a new user” form and our support staff will send them their credentials.

Need to update your hosted Dynamics GP and Dynamics 365 for Sales users?

Need to update your Office 365, Dynamics 365 for Sales/Financials users?

[Click Here!](#)

[Click Here!](#)

[View information about the cost of a license here!](#)

What additional modules for the software are available that we might choose to license in the future?

Microsoft Dynamics GP has over 10 modules to choose from you can view them here:

[Click Here to See the Modules Available in GP](#)

[Click Here to See the Modules Available in CRM](#)

What about updates to the system? Are there any fees for an upgrade?

- We only charge for Professional services if there is additional training or the Client wants to take advantage of new functionality in the latest release.
- Upgrades are coordinated with the Client.
- There is no charge for an upgrade.

What kind of add-ons does WebSan have?

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Working with Microsoft Dynamics for many years has given us the opportunity to help clients overcome many business challenges. Through the years we have developed popular add-ons that we can pass on to you such as our Moniroo add-on. This all-in-one time and expense management system offers a variety features to meet your company's needs. View our add-on page for a capabilities overview.

[View our add-ons](#)

How does your solution improve ability to scale?

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With Microsoft Dynamics GP, Microsoft Dynamics 365 for Sales, Dynamics 365 Business Central and Power BI and more, you can adjust users and applications up or down to meet the changing demands of your business. You can trial applications without a large capital investment and roll out new applications to groups reducing risk and spreading training costs.