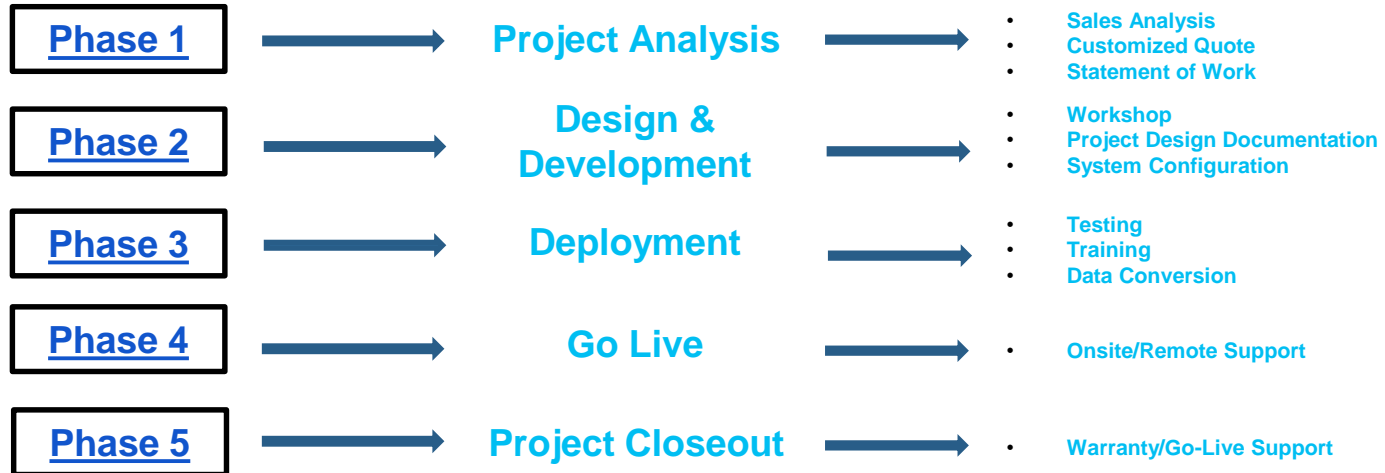# Microsoft Dynamics 365 Business Central

Implementation Plan

Implementation Process – Table of Contents

Click on the different phases to get started.

Phase 1	→	Project Analysis	→	• Sales Analysis • Customized Quote • Statement of Work
Phase 2	→	**Design & Development**	→	• Workshop • Project Design Documentation • System Configuration
Phase 3	→	**Deployment**	→	• Testing • Training • Data Conversion
Phase 4	→	**Go Live**	→	• Onsite/Remote Support
Phase 5	→	**Project Closeout**	→	• Warranty/Go-Live Support

Project Understanding

WebSan will utilize a fixed scope and fee schedule for this project. This program is designed for rapid implementation while providing base-level data conversion, training, and go-live coaching to help your organization successfully transition to the Microsoft Dynamics system.

This project will cover the following core activities:

» Implementation timeline

» Software installation, setup and configuration

» Conversion of master record data from your existing system

» Conversion of operational open transactional data from your existing system as required

» Supplemental Training (primary training to be completed via Web using WebSan University)

» Go-live and ongoing support

Gather Business Requirements: Business Requirements Workshops

This is a series of Design sessions, to further identify and define the business processes the Client needs to have supported by utilizing the modules identified in this Proposal. WebSan will lead discussions and document findings. These sessions are held in order to ensure there are no gaps in WebSan's understanding of the business processes at the Client.

This guarantees that the final system configuration will provide the maximum benefit to the Client and meet the objectives set out in the above sections.

Configuration of the system and data design decisions will be determined by the outcome of these meetings so it is imperative that all business process information be brought forth at these sessions.

Phase 2 (cont'd)

Documents or Data to be supplied by Client include:

» Reports utilized in the normal course of business

» List of core Microsoft Dynamics 365 users and their roles/responsibilities

» Key Dashboard and workflow requirements

» Identify features and functions of Microsoft Dynamics 365 that are must-haves, nice-to-haves and features that can be removed from Microsoft Dynamics 365 to "clean up" the working environment for users

A complete list of data conversion elements are detailed below. A primary contact at the Client should be nominated to be responsible for that data.

Client Responsibility: Ensure that appropriate subject matter experts are in attendance at each session. Provide all pertinent information regarding current business processes. Provide sample data and reports as necessary.

Configure Standard Solutions

WebSan will configure the system and modules listed in the plan based upon the information gathered in the workshop activity. This setup will be performed once in the live organization in Dynamics 365. Setup is completed when a transaction can successfully be entered in the appropriate modules in scope.

WebSan will set up all users and user security. System administrator(s) will be set up with the appropriate rights to customize the system as required.

Client Responsibility: Provide one named Product Champion to be trained during the setup and configuration of the base organization to enable the Client to make system tweaks or improvements on an on-going basis.

Design

WebSan will document Dynamics 365 system Design with the Client based on the Design requirements workshops.

The system setup will be documented and signed off by the Client during the Design Close meeting.

Client Responsibility: Client is responsible for signing off on the design of the system and validating configuration assumptions.

Deployment and User Training

Training on the use of Microsoft Dynamics 365 is classified by the type of end user. All users will be trained by WebSan, once the online training is completed. WebSan will not begin training Client staff until all online training has been completed. WebSan will provide "contextual" training that is specific to the Client, whereas the online training is generic to Dynamics 365.

Each class will be conducted training one module at a time, and can be recorded by the Client for review purposes. A list of applicable Online courses is available at www.websanuniversity.com/catalog.

WebSan will conduct classroom training for the key areas defined in your plan. Note that unless otherwise stated, all training and support services are assumed to be "remote" services facilitated by the web. Onsite support or training services may incur additional charges (above travel costs). Each specific Client need will be addressed by the project manager from WebSan to determine appropriate charges.

Data Conversion

Client Responsibility: Microsoft and WebSan offer extensive on-line training courses, which provide an excellent introduction to the subject matter.

Phase 3 (cont'd)

Client shall take all applicable Microsoft Dynamics 365 online classes for the modules being trained on prior to sessions in order for the classroom training to be most effective. These interactive and detailed classes are accessible from WebSan University.

Make appropriate subject matter experts available for training.

Samples of all data will be required prior to cutover…a final version of the data will be required for the actual cutover activities at go-live.

ID	Area, Description/Entity	Source System	Destination System	Contact	Intended Strategy	D365 Modules
1	General Ledger - Accounts	QB	D365	AM	Auto	FI
2	General Ledger - History	QB	D365	AM	Auto	FI
3	Open AP	QB	D365	AM	Auto	AP
4	Open AR (incl Sales Orders)	QB	D365	AM	Auto	AR
5	Vendors	QB	D365	AM	Auto	POP
6	Customers	QB	D365	AM	Auto	SOP
7	Bank Accounts	QB	D365	AM	Auto	FI
8	Unapplied Payments	QB	D365	AM	Auto	FI
9	Open Purchase Orders	QB	D365	AM	Auto	POP
10	Inventory	QB	D365	AM	Auto	Inventory
11	Warehouse Site Locations	QB	D365	AM	Auto	Inventory

*Any object listed as "Intended Strategy = Auto" means that WebSan will provide a template to the Client to populate for data conversion.

Timeline & Work Effort – A sample timeline of our proposed methodology

Task Name	Duration	Start	Finish
Dynamics 365 Business Central Implementation	49.75 days	Mon 4/4/16	Fri 6/10/16
Preparation	0.25 days	Mon 4/4/16	Mon 4/4/16
Kickoff meeting with key personnel	0.25 days	Mon 4/4/16	Mon 4/4/16
Design Phase	0.25 days	Mon 4/4/16	Thu 4/14/16
Business requirement Workshop	8 days	Mon 4/4/16	Wed 4/6/16
Overall Fit-Gap Analysis	2.5 days	Wed 4/6/16	Fri 4/8/16
Test Case Prep	2 days	Fri 4/8/16	Mon 4/11/16
Design Phase Closeout Meeting (Gap analysis, test scenarios, conversion design	1 day	Thu 4/14/16	Thu 4/14/16
Time allowance for Design doc revisions and updates if required	2.5 days	Thu 4/14/16	Thu 4/21/16
Development Phase (System Configuration/Testing/Mock Data Conversion)	0 days	Thu 4/21/16	Tue 5/3/16
System Configuration	5 days	Thu 4/21/16	Thu 4/28/16
Data Migration	3 days	Thu 4/28/16	Tue 5/3/16
Development Signoff (when configuration completed)	0 days	Tue 5/3/16	Tue 5/3/16
Time allowance for Development milestone review and updates if required	5 days	Tue 5/3/16	Tue 5/10/16
Deployment Phase (Training/Testing/Data Conversion)	13.5 days	Tue 5/10/16	Fri 5/27/16
Training (supplementary to online training)	5 days	Tue 5/10/16	Tue 5/17/16
User Acceptance Testing	5 days	Tue 5/17/16	Tue 5/24/16
Cut Over	3.5 days	Tue 5/24/16	Fri 5/27/16
Production System LIVE	0 days	Fri 5/27/16	Fri 5/27/16
Warranty Phase	10 days	Fri 5/27/16	Fri 6/10/16

The Project start date will be mutually agreed to upon signed Proposal. WebSan agrees to start the project within 6-8 weeks of the signed Proposal and initial payment receipt. The final detailed Project Plan will be delivered upon completion of the workshops during the Design phase; the above is a guideline for now. Additional Proposals will be submitted for each subsequent phase.

Phase 4

Go-Live

After the above activities are completed, the next step is cutting over to the Microsoft Dynamics 365 system. This is also referred to as "Go Live". Activities include, but are not limited to (dependent upon modules implemented per Client proposal):

» AP check run assistance
» AR statement processing
» Posting payables, receivables or GL transaction batches
» Bank Reconciliation
» Purchase Order creation
» Sales Order Processing and Shipping
» Running Financial Reports

Phase 4 (cont'd)

The cutover phase usually takes place over a weekend or a period of a few days.

Client Responsibility: Communicate any open issues that have arisen in the immediate time during the cutover and assist in getting all end-users comfortable with the system.

Phase 5

Warranty/Go-Live Support

Note that a "Warranty Period" has been added to the end of the project plan, which is a free support period for any issues that come up during that timeframe. This is to ensure a smooth transition to the new system.

Any questions?

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WebSan
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