



Setting up Data Migration for
Microsoft Dynamics SL Extension for
Microsoft Dynamics 365 Business Central

for

Microsoft Dynamics SL 2015 or SL 2018

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Introduction

To migrate your Microsoft Dynamics SL 2015 master data into your new Microsoft Dynamics 365 Business Central system, currently a site must manually enter the data. Our tool provides data migration for the following master records without balances or quantities:

- Chart of Accounts
- Sub-accounts (in the new format of Dimensions)
- Customers
- Vendors
- Items
- Payment Terms
- Unit of Measure
- Default setup accounts (as new General Posting Groups)

How to install the Data Migration for Microsoft Dynamics SL extension

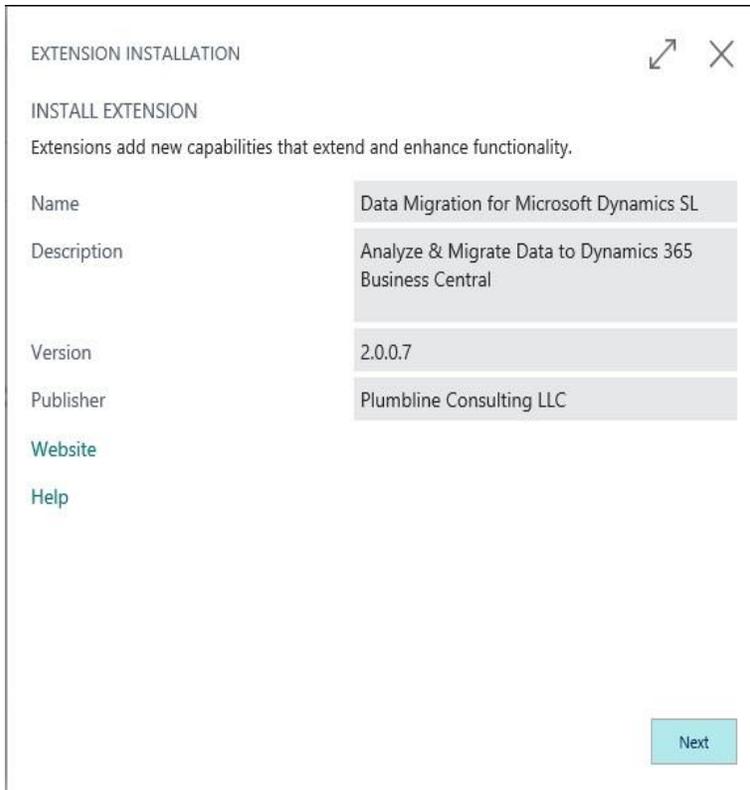
The following section describes the steps required to install the SL Next Software extension in order to import the Microsoft Dynamics SL master data listed above.

Install the Data Migration for Microsoft Dynamics SL extension

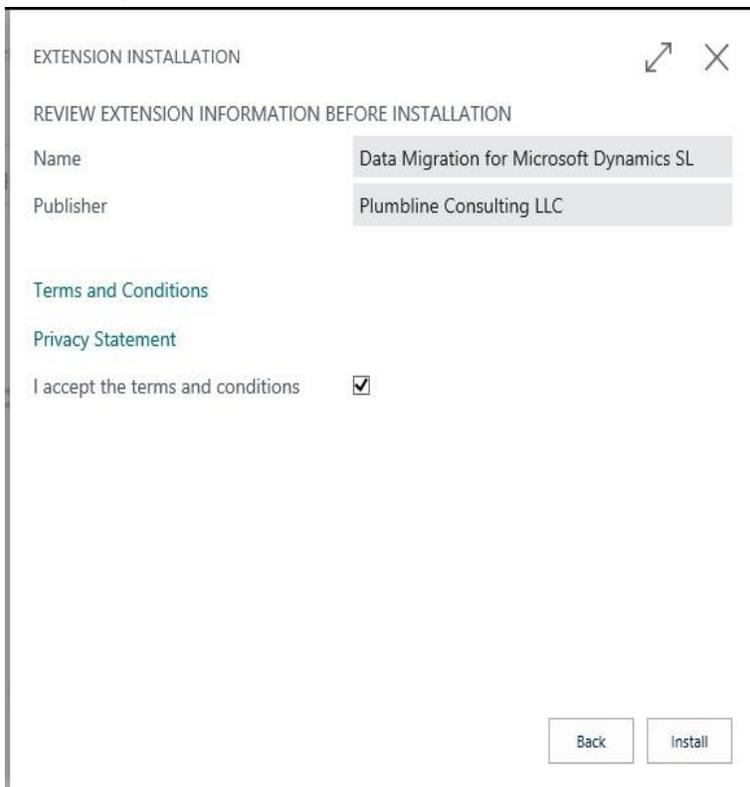
1. When logging into Dynamics 365 Business Central, select the option to Find more apps that work with Dynamics 365 Business Central, and then click **AppSource**. Or from the Extension Management page, search and locate **Data Migration for Microsoft Dynamics SL**, and then click to install the extension.



2. In the Extension installation page, click **Next**.



3. The terms of use and verification displays. Select the checkbox to accept the terms and conditions, and then Click **Install**.



4. Click **OK** to complete the installation.

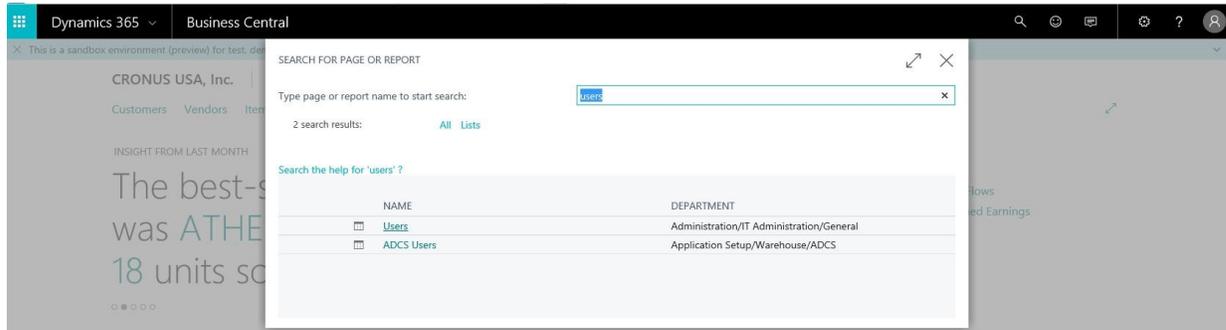
The Dynamics SL Data Migration extension was successfully installed.
All active users must log out and log in again to see the navigation changes.

OK

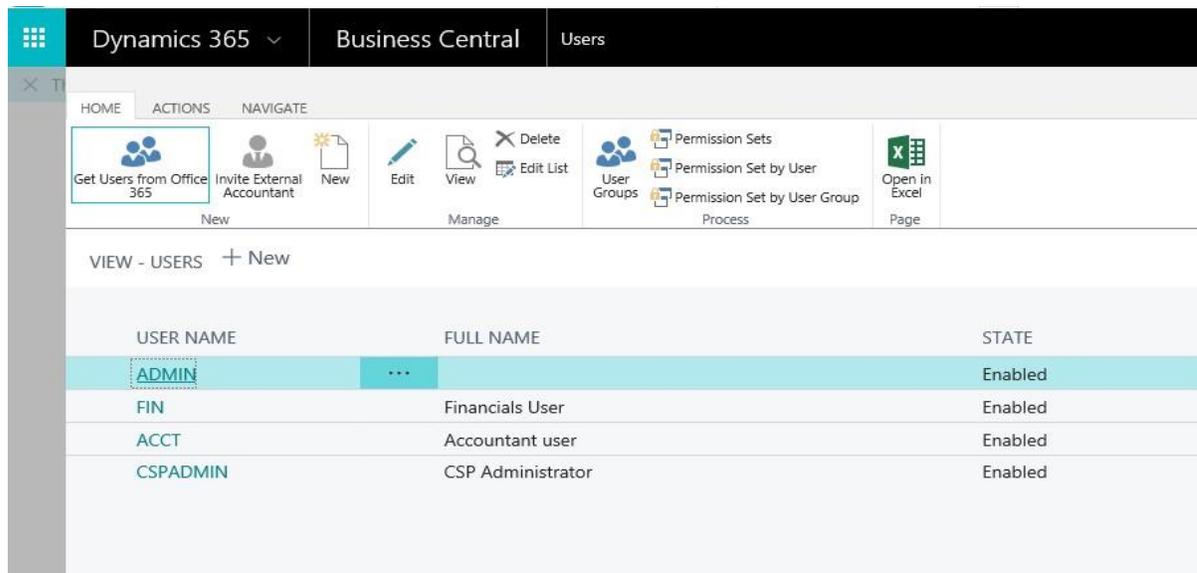
User Setup

Steps:

1. Search for **Users** and click to open the page.



2. Select the user you are logged in as or the user you wish to grant permissions to the Data Migration for Microsoft Dynamics SL utility.

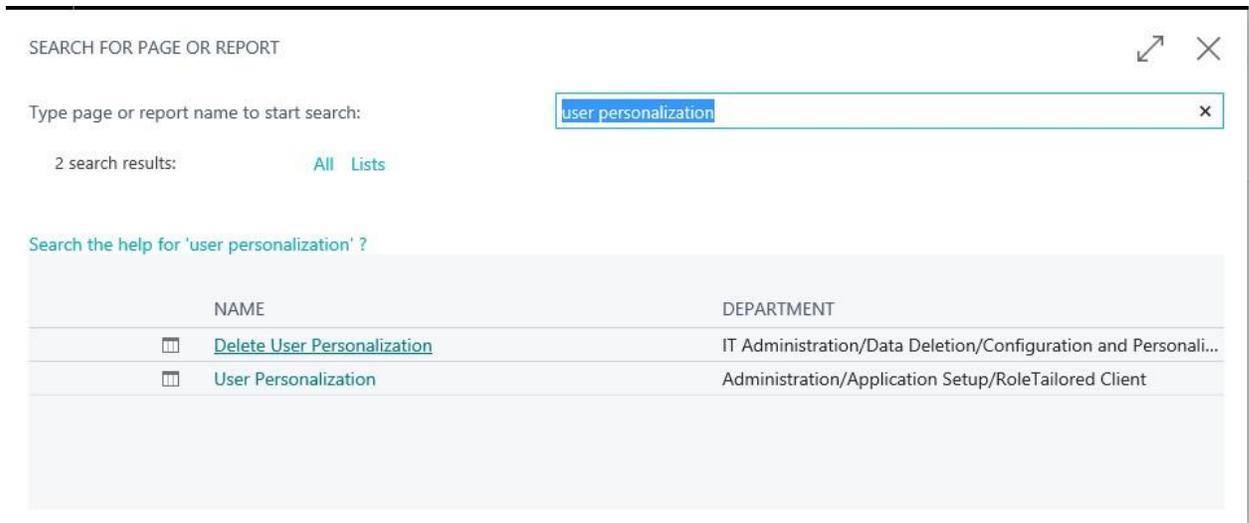


3. Page down. Under User Permission Sets add the **SL DATA MIGRATOR** permission set.

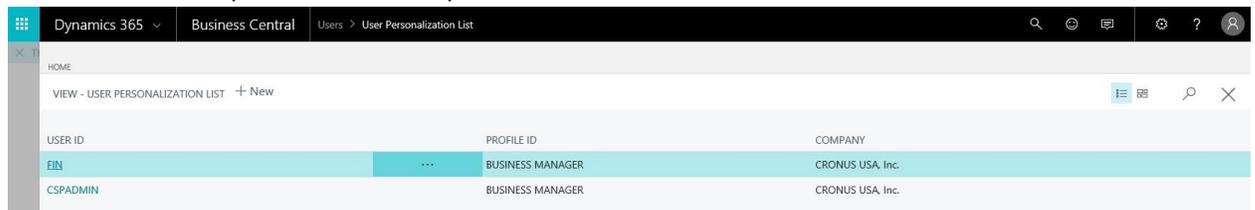
User Permission Sets

PERMISSION SET	DESCRIPTION	COMPANY	EXTENSION NAME
D365 BUS FULL ACCESS	...	Dyn. 365 Full Business Acc.	
LOCAL	...	Country/region-specific func.	
SL DATA MIGRATOR	...	Dynamics SL Data Migrator	Data Migration for Microsoft Dynamics SL

4. Close the screen
5. Search for **User Personalization** and select it to open the page. Note: Do **not** select the 'Delete User Personalization' page in the search results.



6. Select the user setup in the earlier step to edit the Profile ID.



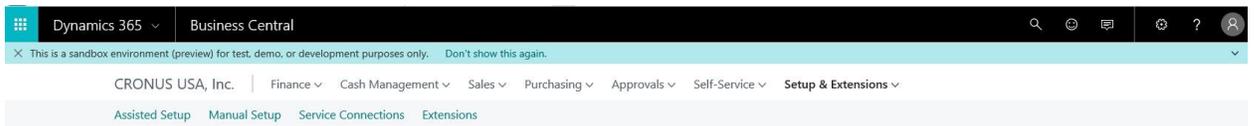
7. Under Profile ID select **Business Manager** then close the screen.



Data migration import

Steps:

1. Start with an empty company without any prior data.
2. From the Microsoft Dynamics 365 Business Central Home page, click the **Setup & Extensions** menu.



3. The Assisted Setup navigation pane will open. Click **Migrate business data**.

Dynamics 365 Business Central Assisted Setup	
CRONUS USA, Inc. Finance Cash Management Sales Purchasing Approvals Self-Service Setup & Extensions	
Assisted Setup Manual Setup Service Connections Extensions	
Assisted Setup: All Search Page Show all	
NAME	STATUS
Migrate business data	Not Completed
Set up sales tax	Completed
Set up cash flow forecast	Completed

4. In Data Migration, click **Next**.

DATA MIGRATION ↗ ✕

 WELCOME TO DATA MIGRATION ASSISTED SETUP GUIDE

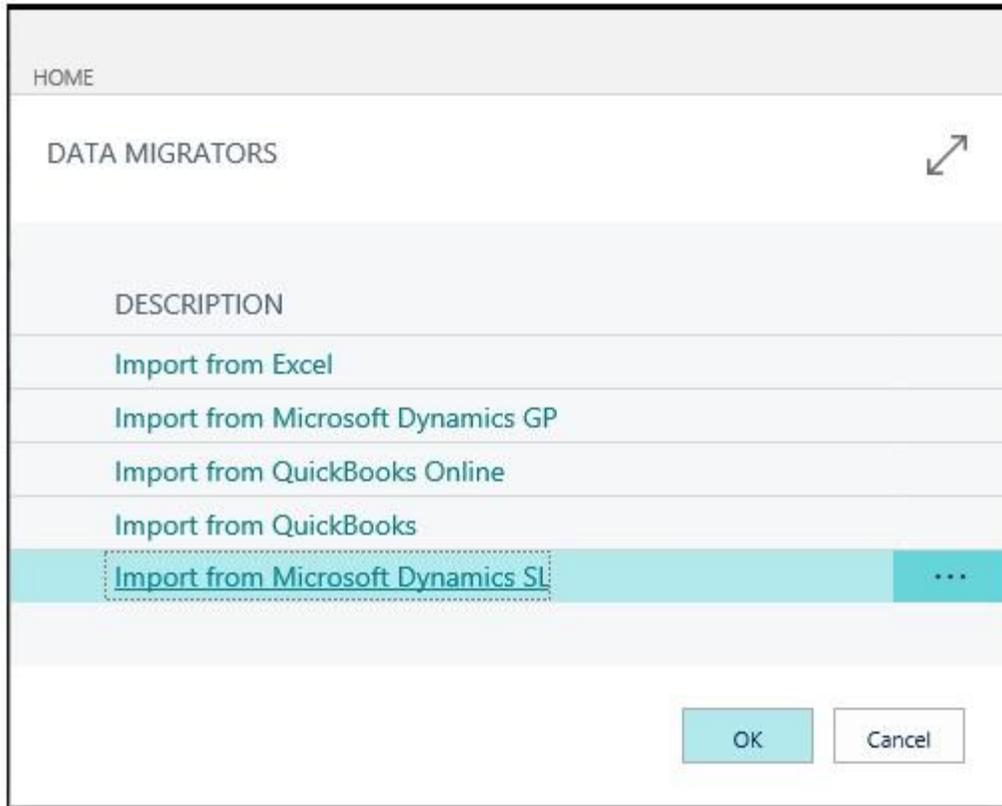
You can import data from other finance solutions and other data sources, provided that the corresponding extension is available to handle the conversion. To see a list of available extensions, choose the Open Extension Management button.

LET'S GO!

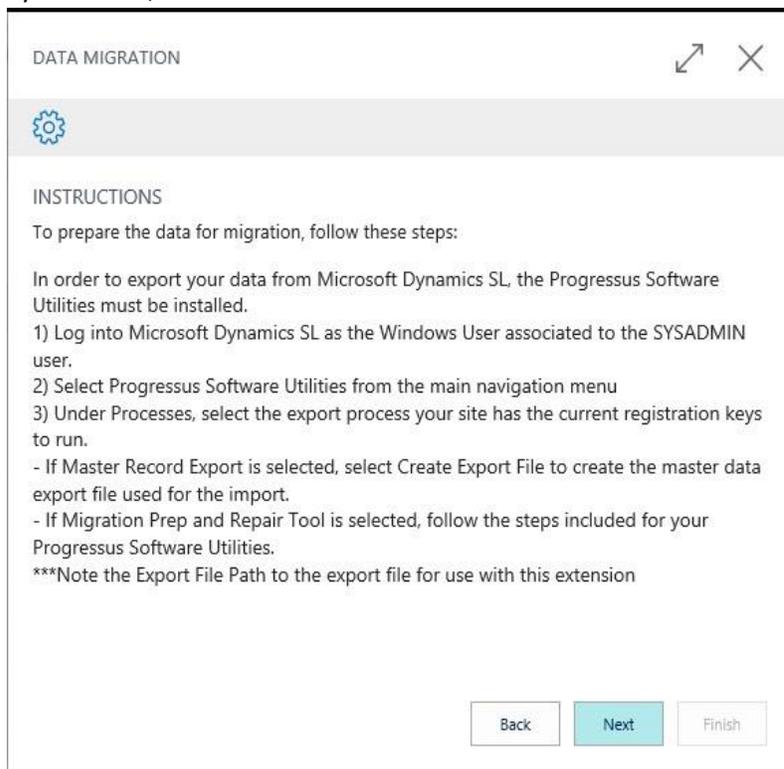
Choose Next to choose your data source.

Open Extension Management
Back
Next
Finish

5. Under Choose your data source, browse and select **Import from Microsoft Dynamics SL**, and then click **OK**.



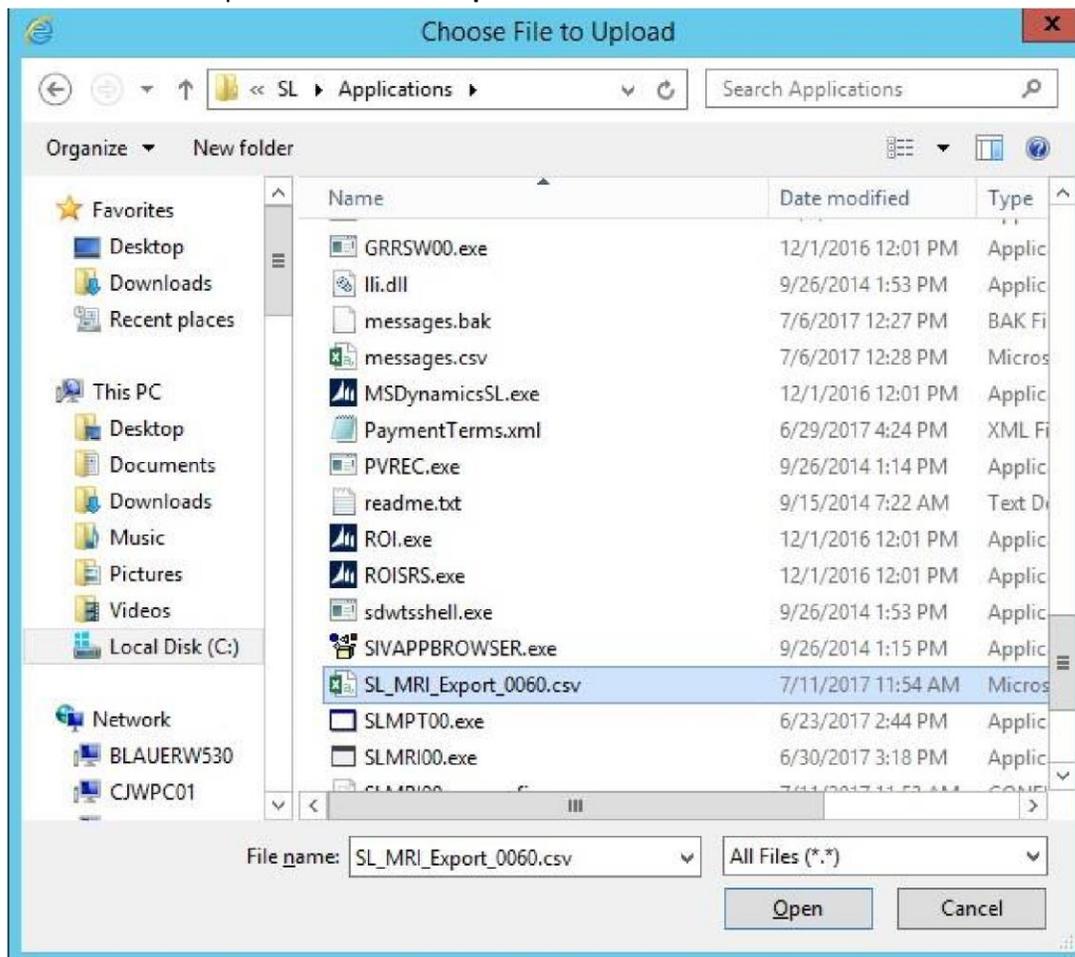
- Under Instructions, follow the steps needed to export your master data from Microsoft Dynamics SL, and then click **Next**.



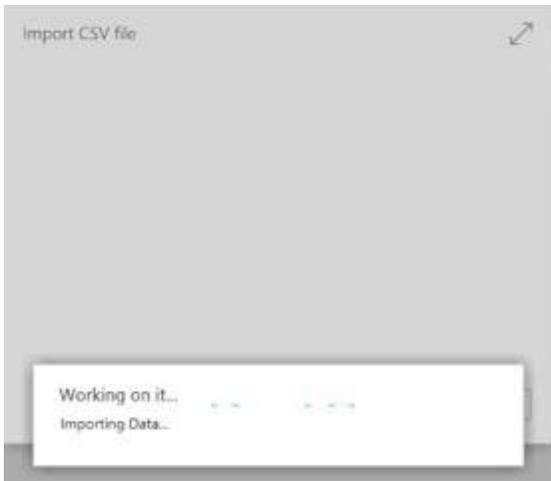
7. Select **Choose** to navigate to the import file exported from the Master Record Import utility in the prior step.



8. Select the file for import and then click **Open**.



9. After selecting the file for import the process will begin validating the file:



10. The import will display the master records for import. Click **Migrate**.

DATA MIGRATION

Choose the data to migrate

SELEC...	TABLE NAME	NO. OF RECORDS
<input checked="" type="checkbox"/>	Payment Terms	14 ...
<input checked="" type="checkbox"/>	G/L Account	338 ...
<input checked="" type="checkbox"/>	Customer	18 ...
<input checked="" type="checkbox"/>	Vendor	87 ...
<input checked="" type="checkbox"/>	Item	172 ...
<input checked="" type="checkbox"/>	Unit of Measure	10 ...
<input checked="" type="checkbox"/>	Gen. Business Posting Group	4 ...

Back Migrate Finish

10a. Before clicking the Migrate button, you can open the Data Migration Overview page to see the status of the Master Records being imported using

the Façade....

TELL ME WHAT YOU WANT TO DO

data migration overview

Go to Pages and Tasks

> Data Migration Overview Administration

DATA MIGRATION OVERVIEW

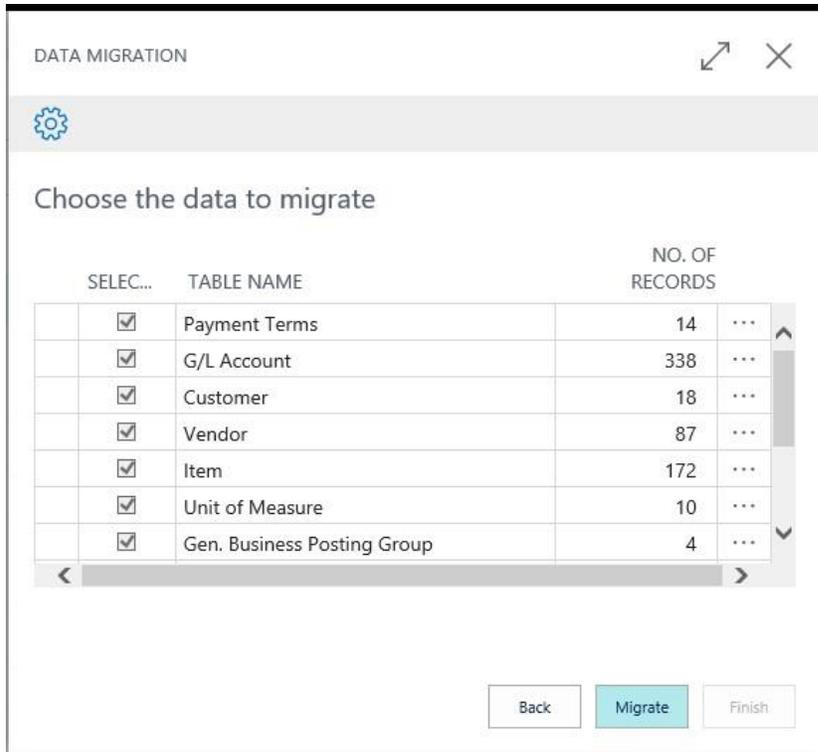
Search Process Show Attached Open in Excel

Migrating General Journal Lines from Microsoft Dynamics SL

Progress General Journal Lines Migration Status is complete.

TABLE NAME	MIGRATED NUMBER	TOTAL NUMBER	PROGRESS PERCENT	STATUS	NEXT TASK	ERROR COUNT
G/L Account	25	25	100%	Completed		0
Customer	7	7	100%	Completed		0
Vendor	6	6	100%	Completed		0

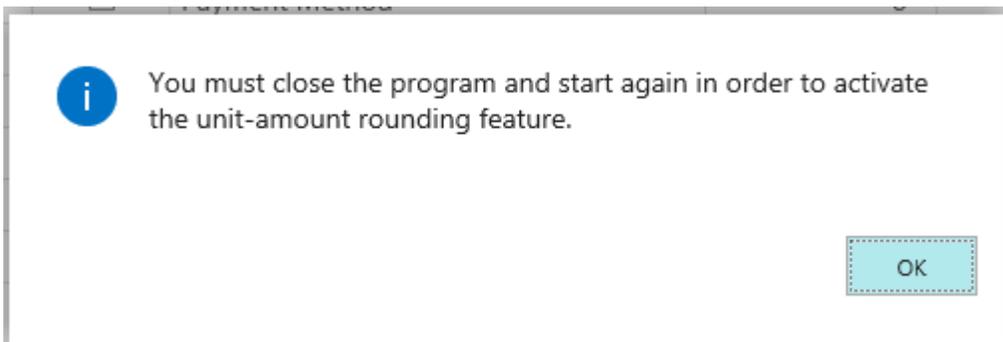
10b. Once the G/L Account, Customer, and Vendor Migrations are completed, you can click on the Migrate button:



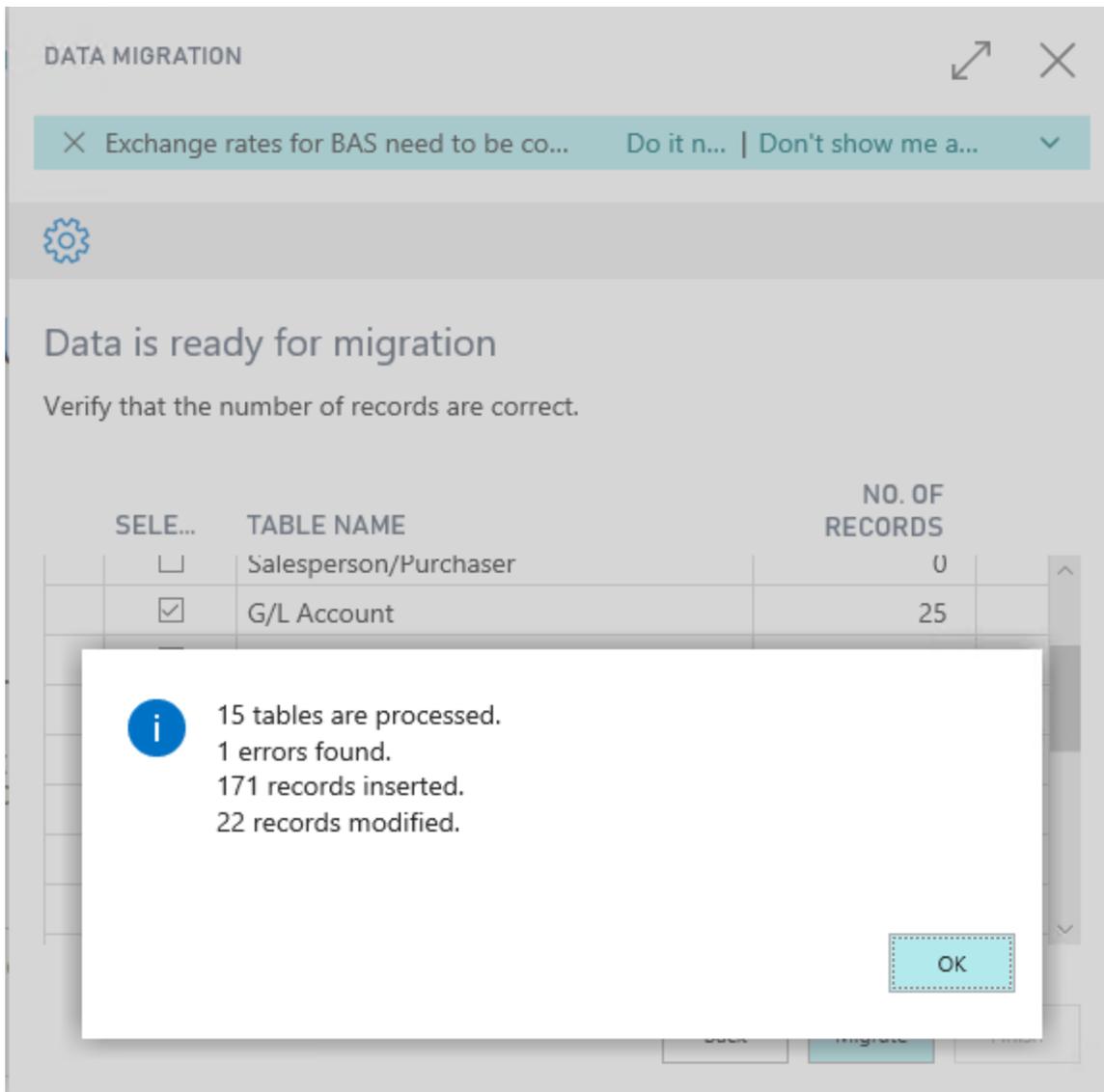
11. The remaining data will now be imported into your Dynamics 365 Business Central company.



12. Click Ok to the following message.....



13. The following summary informational message will appear.
Click ok:



14. Click **Show Errors** to show any errors in the Data Migration page that pops up...



Exchange rates for BAS need to be co... Do it n... | Don't show me a... 



To check the status of the data migration, go to the Data Migration Overview page.

View the status when finished

IMPORT COMPLETED WITH ERRORS

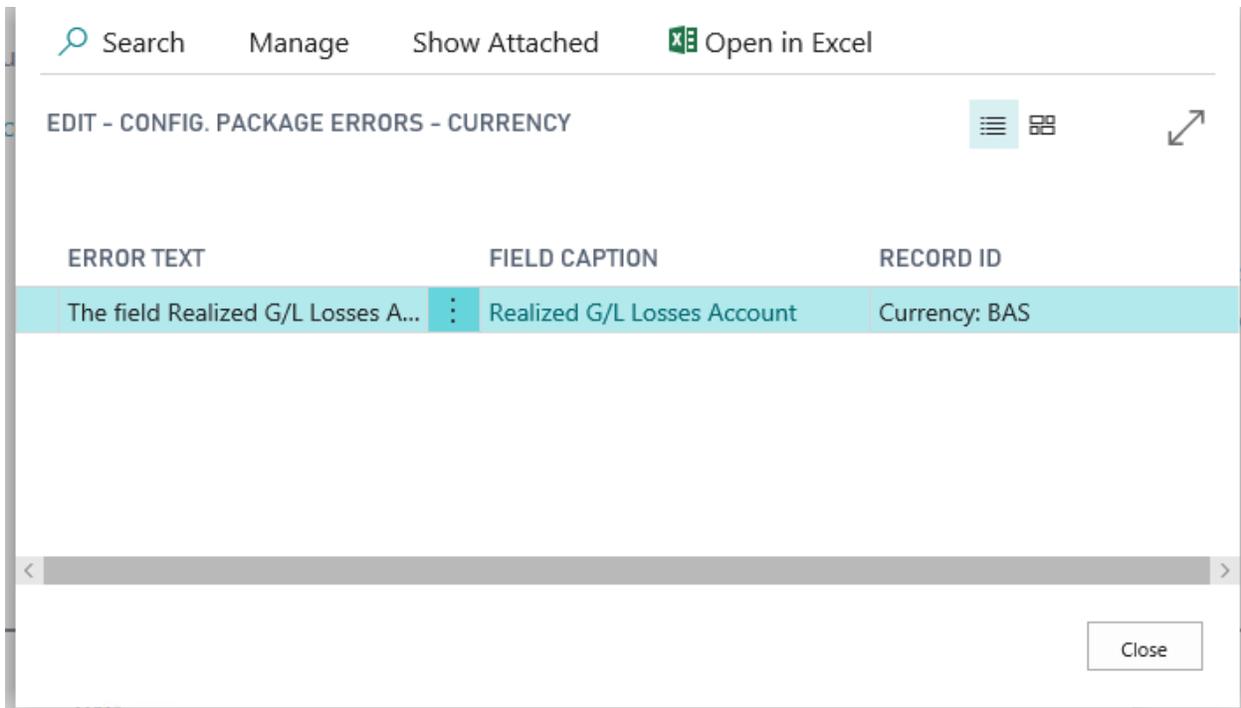
There were errors during import of your data. For more details, choose Show Errors in the actions below.

Show Errors

Back

Next

Finish



15. Click Close. Then click on **Finish** from the previous screen to reopen the Data Migration Overview Page of the records migrated using the Data Migration Façade and if any errors or full completion of the master data and general journal lines migration occurred...

