CENTRAL Implementation Guide

COOPER PARRY IT

IT'S A BIT LIKE MOVING HOUSE

Changing your systems is a bit like moving house. To help understand the process of migrating from your old system to Dynamics 365 Business Central, we've described the process in a context most people will be familiar with...



DAY 1.0

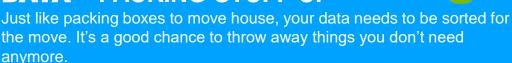
KICK OFF – HOW THE MOVE HAPPENS

This is where the process starts. We'll explain the process we'll be going through together and answer any questions you may have. We'll put together a timeline and set key dates that need to be hit.



2.3

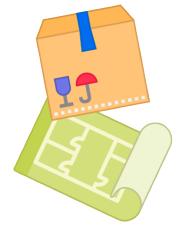
DATA – PACKING STUFF UP



2.1 SETUP CALL

We'll talk you through some key concepts in Business Central. Think of it as understanding the layout of the new house. This may help with how you need to pack.

2.2



DATA CALL – WHERE'S STUFF GOING?

We'll have a call while you're packing up. You may have questions about what needs to go where.

DATA CALL - MAKE SURE STUFF IS TIDY

We'll have a chat to ensure everything is ready to go for the moving team.

IMPORTANT

The moving date is booked with the team and any delays may impact your Go-Live (move in day!)

PACKING TIPS

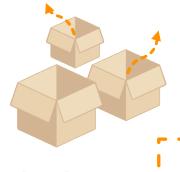
- Follow the useful instructions (found on your SharePoint site) for completing the templates
- Start early as it may take longer than you think
 Concentrate on the core information first (Customers, Vendors, Items, Chart of Accounts)
 Take it as a chance to cleanse

SETUP & CONFIG

This is where your new home (Business Central) is setup and all of your stuff (data) is moved in.

TENANT SETUP – BUILDING YOUR NEW HOUSE

This is done while you're packing. It's like popping up a new home in a lovely secure neighborhood



DAY

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3.1

DATA & CONFIG – UNPACKING THE BOXES

We'll unpack the boxes, plumb in the dishwasher, program the thermostat ready for your arrival.

FOLLOW UP CALL - EVERYTHING IS WHERE IT SHOULD BE

We'll have a run through to tell you how it all went and if there's anything you need to do.





WALKTHROUGH – WITH SUPER USERS

An introduction to your new pad. Showing you how things work and getting used to the new look and feel.

4 1 ; OUT THE BOX – FEATURES & FUNCTIONALITY

We'll walk you around the new layout, show you where all your stuff is and introduce you to your new tools and appliances.





MOD-POT DISCOVERY- SMALL TWEAKS

If you have opted for a mod-pot there may be some tweaks required. Think painting a wall rather than knocking it down!

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MOD-POT DEV WINDOW

The small changes take place.

4.3 ¢ MOD-POT REWORK – SNAG-LIST

Mods are tested/inspected. Any touch ups required are quickly identified and completed.

DAY TRAINING – How To Work The Dishwasher

Showing you how things work. Some may be new versions of things you've used before – others, you'll wonder how you lived without!

5.2

5.1 \leftarrow - \checkmark TRAINING THE TRAINER

5 ()

We'll provide training to a person(s) that can help show and train the rest of the family!



SELF-SERVE TRAINING

You'll have access to online training materials in the form of videos, walkthroughs and guides for anyone to use!

5.3 -----

TRAINING TASKS

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We'll provide a template of training tasks for your team to complete. Once they're complete, we'll know you'll be safe and comfortable in your new home!



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GO LIVE – MOVE IN DAY

Everything's ready for moving in. Sure it'll take a bit of time to get completely comfortable, but you're in!







The moving team that made it happen are on hand to help you through any problems.

6.2

CATCHUP CALL

The moving team will give you a buzz to make sure you're settling in.





6.3

CUSTOMER CARE HANDOVER

The moving team will handover to our dedicated customer care team to assist you from now on.

CONTACTS

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SAY HELLO

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