

SAMPLE AGENDA

DAYS 1 - 3

Tour plant
Document processes
Identify pains and process gaps
Conduct break-out sessions:

- Sales / Customer Service
- Engineering, Bill of Materials and Routings
- Production Control / Scheduling
- Purchasing / Inventory Replenishment
- Plant Floor
- Warehouse / Receiving / Shipping

DAY 4

Provide overview of Business Central capabilities
Review master data (customers, vendors and items)
Recommend best setup for the following modules:

- Manufacturing
- Inventory
- Purchase and Payables
- Sales and Receivables

DAY 5

Give Business Central Demonstration of:

- Sales Quotes and Sales Orders
- Production Forecasts
- Planning Parameters and Inventory Replenishment
- Production Orders / Assembly Orders (if applicable)
- Purchase Quotes, Purchase Orders and Purchase Order Approval Workflows
- Receiving, Putaways and Vendor Invoices
- Picks, Shipments and Invoicing