

THE PROJECT CHECKLIST

FOR

DYNAMICS 365 BUSINESS CENTRAL
INTEGRATIONS



SMART CONFIGURABLE SOFTWARE



INTEGRATION CHECKLIST

Your next Microsoft Dynamics 365 Business Central integration project can be a huge success. Utilize our recommended integration project checklist to ensure you don't miss a step in the process.

- ☐ Identify key team members needed for project.
- ☐ Include skilled communicators who know the source and destination data.
- ☐ Ask key team members to join the project.
- ☐ Set and conduct kick-off meeting.
 - Review project goals.
 - Determine responsibilities of each team member.
 - Establish a time frame.
- ☐ Complete action items from each kick-off meeting & report back to the project manager.
- ☐ Engage a strategic integration partner. (Optional, but recommended).
- ☐ Schedule demos to see recommended integration solutions.
- ☐ Set up post-demo calls with technical team to ask final questions.
- ☐ Select solution, as well as training and support plans.
- ☐ Schedule training for team members working with solution.



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- ☐ Prepare through project scope, which includes:
 - Determining the phases and order of data to be integrated.
 - Identifying all prerequisite data identified up front.
- ☐ Get sign off from all project team members.
- ☐ Complete training.
- ☐ Train certification test(s) to ensure training was successful.
- ☐ Set date for product install and all elements of integration project.
- ☐ Ensure all pre-requisites are met for selected solution, according to guidelines via product manual.
- ☐ Install integration solution in test environment.
- ☐ Specific to Dynamics 365 Business Central, make sure the objects that you'd like to integrate with are published as services in Dynamics 365 Business Central.
- ☐ Build integration 1 per project scope.
- ☐ Review integration with team to ensure all requirements have been met.
- ☐ Conduct appropriate testing starting with a small number of records and add more.
 - Test 1-3 to 5 records with different values.
 - Test 2 – use 20 to 50 records.
 - Test 3 – test with a full set (100+) records if possible.



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- ☐ Create next integrations for phase 1 and follow same process as above.
- ☐ Test all integrations to ensure they are working successfully.
- ☐ Document all data sources, destinations, customizations and validations added, email notifications set up, key considerations and overall purpose of integration – for each integration created.
- ☐ Move integrations from production to live.
- ☐ Test again.
- ☐ Review integration in live environment with appropriate team members.
- ☐ Determine ROI for communication to key stakeholders.
- ☐ Communicate integration changes and benefits to team members.
- ☐ Ensure technical support is available if issues arise with integration.
- ☐ CELEBRATE your success.
- ☐ Begin to identify integrations needed for phase 2 of integration project plan.

We'd love to hear from you and look forward to discuss making Dynamics 365 Business Central integration easy using **SmartConnect**.



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