



Long View Dynamics 365 Business Central in 12 Weeks



A Company that takes the "Long View"

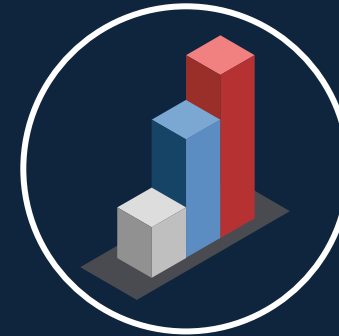
Over 1,200 employees
(930 technical)



Est. 1999
(100-year vision)



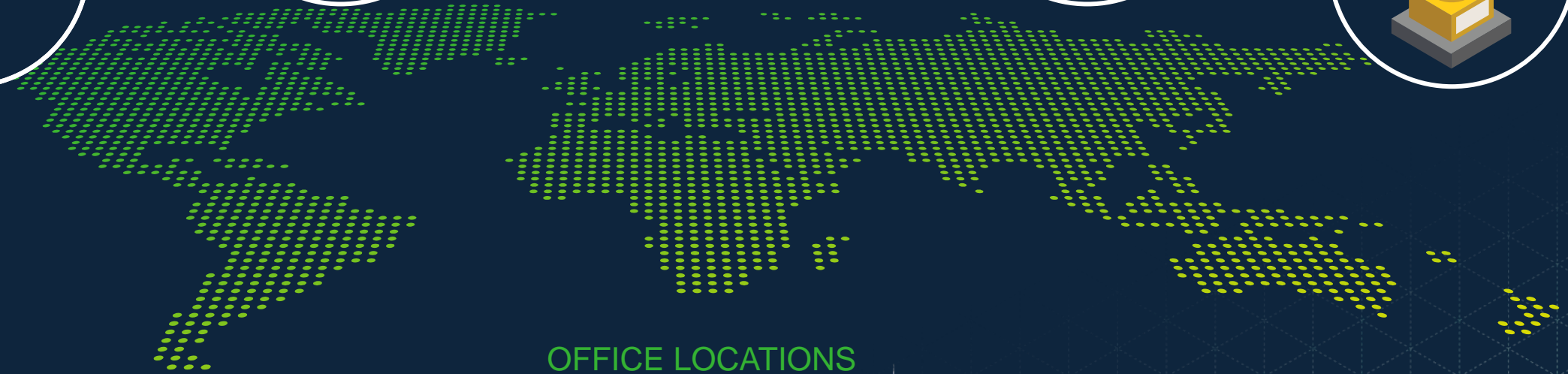
Privately Owned
(we grow with our customers)



Success through
strategic partnerships



Born, raised, and
headquartered in Alberta



OFFICE LOCATIONS



CALGARY



EDMONTON



VANCOUVER



VICTORIA



TORONTO



DENVER



HOUSTON

Dynamics 365



“ That complete notion of Business Transformation is something that only Microsoft can do. That is why I care so much about the mainstreaming of Dynamics. **It’s not about Dynamics on its own, it’s about Dynamics at the centre of the company.** Microsoft’s best interest is for its partners to educate customers on the value of the full Microsoft stack ”

- Satya Nadella
Chief Executive Officer at Microsoft

Long View D365 – BC12

1. Prepare

Long View and Customer teams set up required tools and collect business details required for a successful implementation.

2. Configure

Together, we review collected data, refine Solution Blueprint, and complete initial configuration.

3. Build

Review the configured solution, import sample data, and build required custom components.

4. Launch

We conduct a final User Acceptance Test, train end users, and release our MVP to production.

5. Operate

We monitor and provide support to your team members through your first month-end close.

Solution Scope



General Ledger



Accounts Receivable



Accounts Payable



Budgeting & Forecast



Time & Expense Management



Financial Reporting & Analytics



Purchasing



Credit and Collections



Cash & Bank Management



Fixed Assets



Public Sector Financials



Revenue Recognition



Project Accounting



Inventory Management



Cost Accounting



Consolidations



Regulatory Compliance



Configurable E-invoicing & Payments



Configurable Tax & Regulatory Reporting



Regulatory Discovery & Alerting Service



Sales

D365 Business Central in 12 Weeks

Project Implementation Team (12 Weeks)

Managed Services

Long View

Customer

Prepare (1 week)

- Conduct walkthrough of data entity workbook
- LCS, Azure DevOps, and Teams setup
- DEV and TST Environments provisioned
- Project team assigned
- Workshops scheduled

- Procure required licenses
- Complete customer workbook

Workshop (2 Weeks)

- Project kickoff
- Joint review of workbook
- Populate backlog
- Configure TST

- Project kickoff
- Joint review of workbook
- Provide master data for import
- Provide details for check report and invoice report

Config & Build (7 weeks)

- Prepare DEV and GOLD environments
- Release every sprint
- Iterative Technical Testing
- Conduct project team training
- Refine configurations
- Mock Cutover #1

- Attend project team training
- Validate imported data
- Create user test scripts

Test & Launch (2 weeks)

- Support End User Training
- Mock Cutover #2
- Support completion of Microsoft go-live assessment checklist

- End User Training
- Validate imported data
- User Acceptance Testing
- Complete Microsoft go-live assessment checklist
- Cutover

Operate (hours/month)

- Go-live support
- Managed Services handoff
- Project Closure

- Run end-of-month, end-of-year processes in Dynamics

Detailed Scope (part 1)

General Ledger

- General Journal entry using D365 forms
- General Journal entry using Open in Excel
- Complete General Journal created via Accounts Receivable Write Off process
- General Journal Template Creation and Retrieval
- Periodic Journal Creation, Completion, and Retrieval
- Foreign Currency Revaluation
- Financial Period Close Workspace
 - Ledger Allocation Rules, Process Allocation Request, and Allocation Journals
- Year End Close
- Utilize General Journal Processing Workspace

Accounts Payable

- Create and Manage Vendors
- Import W-9s (US)
- Invoice Journals
- Debit Memos
- Vendor Payments and Prepayments
- 1099 (US)
- Review and Approve Workflow-related Items
- Settle and Unsettle Transactions
- Process Payment to Tax Authority
- Invoicing Workspace

Accounts Receivable

- Create and Manage Customers
- Process Free Text Invoices
- Free Text Invoice Credit Memos
- Customer Payments and Prepayments
- Settle and Unsettle Transactions
- Customer Reimbursement
- Write Offs

Budgeting

- Budget Register Entries using D365 forms
- Budget Register Entries using Open in Excel
- Utilize Ledger Budgets and Forecasts Workspace

Cash & Bank Management

- Process Balance Transfer
- (Basic) Bank Reconciliation
- Process Bank Fees
- Checks (Check Register)
- Set Up and Void Check Numbers (for Fixed, pre-printed check numbering)
- Calculate Cash Flow Forecasts
- Utilize Bank Management Workspace

Tax

- Report Sales Tax for Settlement Period
- Settle and Post Sales Tax

Detailed Scope (part 2)

Purchasing & Receiving

- Purchase Orders
- Purchase Requisitions & Approvals
- Receiving & Inventory Allocation
- Product Management

Inventory Management

- Product Catalogues
- Bill of Materials
- Inventory Counts, & Costing
- Tracking (Serial, Lot, Batch, etc.)
- Transfers & Cross Docking

Data Migration

- Vendors
- Customers
- Open AP
- Budgets for current and 2 prior fiscal years
- Open Bank items
- Opening Balances for current and 2 prior fiscal years
- Workers
- Open POs
- Inventory & Products
- B.O.M

Standard Reports

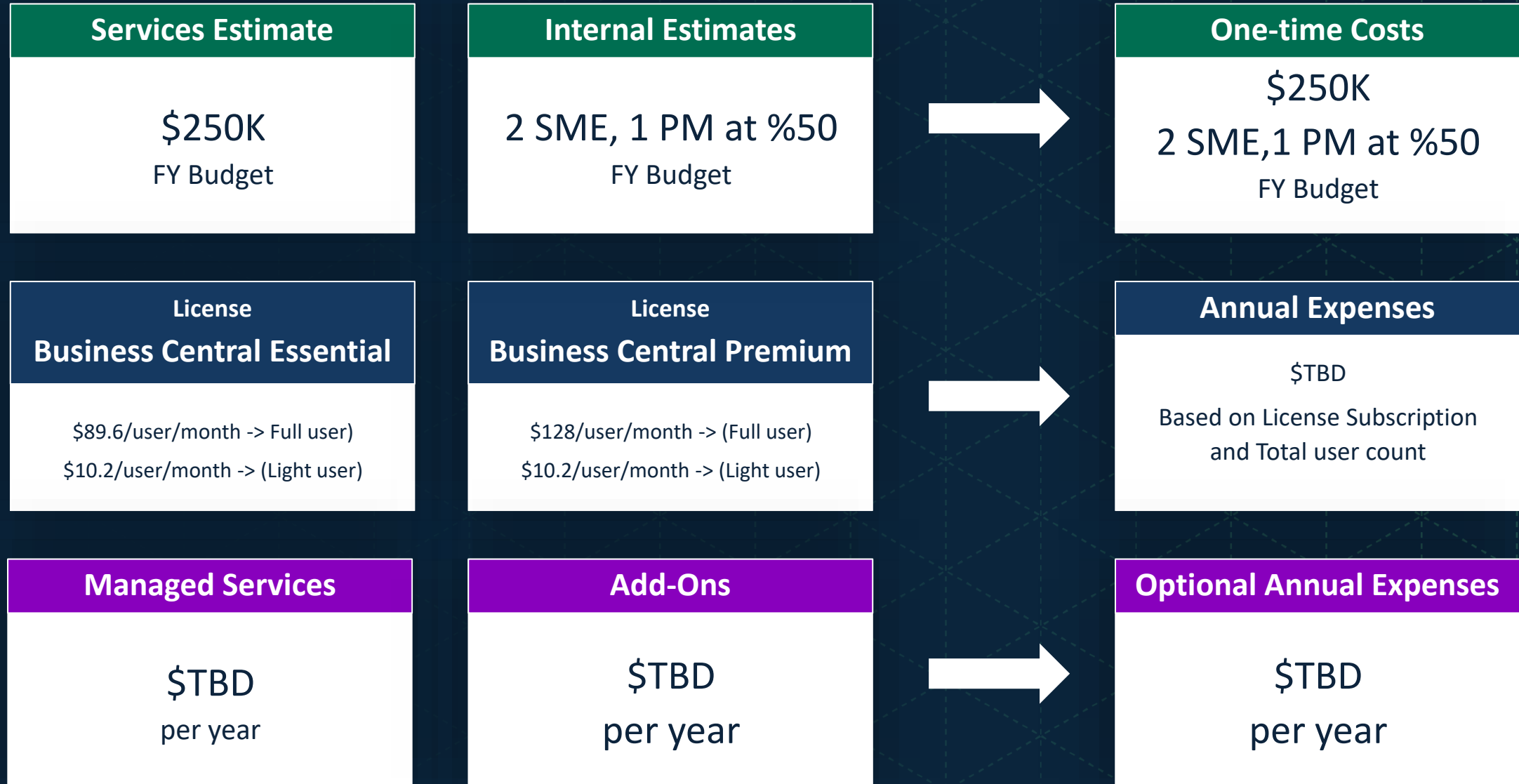
- Standard AP Reports
- Standard AR Reports
- Standard Cash and Bank Reports
- Budgeting Reports – Actuals vs Budget, Actuals vs Budget by Period
- Tax Reports
- 10GL Reports
- Finance Reporter Training
- Power BI CFO Dashboard Package*

Modifications

- Custom Check
- Custom ACH
- Minor entity changes to support data migration

* Assumes OOTB fit maintained

Business Central – By the Numbers



Where it ranks



As of June 2021

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Interested in learning more?

<https://www.longviewsystems.com/data-applications/data-modernization/>