



Microsoft Dynamics 365 Business Central Implementation

Fit Gap Analysis

Prepared for

[Customer Logo]

Prepared by

Senior Application Consultant Name



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1 Introduction

A Functional Requirements Document and Fit Gap Analysis Document were prepared based upon business requirements described by [Customer Name]' core team users during the requirements discovery and analysis process. The Fit Gap Analysis Document is a supporting document to the Functional Requirements Document which identifies any gaps found in the functionality.

This Fit Gap Analysis Document identifies the list of functional gaps. For each functional gap, the functional gap is described, and options are provided for a customization/modification, an ISV product, or a workaround process. Design documents with complete details into the development efforts will then be prepared for all approved Fit Gap Analysis Document options.

The following hours estimated are **rough** estimates and will be subject to further validation through the completion of detailed design specification documents.

2 Fit Gap Analysis Options

The following details the Fit Gap findings by functional area based upon what was learned during the requirements discovery and analysis.

2.1 Sales

2.1.1 Salesforce Integration

There is customization in Salesforce to create new customers in NAV. The same occurs in Sana for all new web customers. This integration will need to be replicated in Business Central.

Development Notes: Custom integrations with Salesforce are not the first option and rarely done. 3rd Party ISVs are the first option. We can estimate the hours if needed and after more detail is supplied. The estimate is just for supporting an external Salesforce Developer to write to BC.

Option	Category	Description	Complexity	Estimate
A	ISV	Identify a suitable ISV replacement like eOne (TBD)	High	TBD
B	Customization	Integrate Salesforce with Business Central	Medium	32 hrs.

2.1.2 eCommerce

[Customer Name] receives online orders using Sana.

Option	Category	Description	Complexity	Estimate
A	ISV	Keep and upgrade Sana	High	TBD
B	ISV	Identify a suitable ISV replacement (TBD)	High	TBD

2.1.3 "Customer Type" Field

The "Customer Type" field on the customer card identifies the branding used on documents. Depending on the value, the logo would dynamically change on the report.

Development Notes: The below estimate is just for adding the Customer Type field to the Customer table and Customer Card page and the Logo field to the Company Information table/Card and a handful of existing BC Document Reports that might use it. It does not include hours for creating new reports, just creating report extensions for existing.

Option	Category	Description	Complexity	Estimate
A	Customization	Customize "Customer Type" field, so that the logo dynamically changes	Medium	20 hrs.

2.1.4 Ordering Process

Send e-mail confirmations via e-mail to multiple individuals

Option	Category	Description	Complexity	Estimate
A	Customization	[CUSTOMER NAME] would like to send e-mail confirmations via e-mail to multiple individuals. The payment terms need to be included as part of the attachment.	Medium	20 hrs.
B	ISV	Zetadocs Capture and Delivery (TBD)		TBD

Freight calculation tool that runs automatically

Option	Category	Description	Complexity	Estimate
A	Customization	There is a freight calculation tool that runs automatically on the sales orders that will need to be replicated in BC.	Medium	20 hrs.

List of the sold Item by date range, including quantity and price

Option	Category	Description	Complexity	Estimate
A	Customization	Some customers buy the same product repeatedly. A customization will be needed to show a list of the sold Item by date range, including quantity and price.	Medium	16 hrs.

2.1.5 Customer Returns

A customization might be needed to adjust the sales contract automatically

Option	Category	Description	Complexity	Estimate
A	Customization	Adding any returned product from the Sales Return Order to a Sales Contract is painful. A customization might be needed to adjust the sales contract automatically. Users have to update the quantities manually, which is prone to errors.	Medium	16 hrs.

2.2 Inventory

2.2.1 Items

Adding a new "Item Type"

Development Notes: Estimate is just for adding the fields to the Item table and Item Card with no custom logic.

Option	Category	Description	Complexity	Estimate
A	Customization	Several fields will need to be replicated (Ex. Brand, Needs CBOT, Hedge Category, etc.). Adding a new "Item Type" field might benefit from segregating Raw Materials, Intermediate, and Finished Good items. The "Item Packing" configures the customers' pallet/tote quantity combination.	Low	4 hrs.

2.2.2 Item Tracking

Customization on the lot number format includes today's date

Development Notes: Estimate includes Sales Item Tracking, Purchase Item Tracking, Item Journal Item Tracking, and Production Order Item tracking.

Option	Category	Description	Complexity	Estimate
A	Customization	Customization on the lot number format includes today's date	Medium	48 hrs.

Two new fields on the Item list and card can be added for Available and Quarantined stock.

Development Notes: Estimate below includes runtime logic/calculations on the Item Card and Item List.

Option	Category	Description	Complexity	Estimate
A	Customization	The quantity-on-hand field shows all inventory regardless of status. Users are painfully navigating each item card and checking for actual available inventory. Two new fields on the Item list and card can be added for Available and Quarantined stock.	Low	8 hrs.

2.3 Production

2.3.1 Production BOMs

BOM number on the Planning Worksheet from a dropdown menu

Development Notes: Estimate assumes Location Code will need to be added to the Production BOM Version table and used to validate against the Location Code of the Planning Worksheet line. It will require override of Microsoft code to grab correct default version based on Location field.

Option	Category	Description	Complexity	Estimate
A	Customization	Some Production BOMs might use different ingredients or quantities based on which plant they are produced in or which machines they are produced on. Users pick the correct BOM number on the Planning Worksheet from a dropdown menu. They have to make sure the BOM number and location match. This Customization needs to be replicated or enhanced.	Medium	28 hrs.

2.3.2 Production Order

Replicate the "Default Qty per Pallet" on the Item card and function during output

Development Notes: Estimate is to override the Microsoft output Quantity logic for the Prod. Order Line Item to use the new Default Qty. Per Pallet field. It assumes this will only occur on the Output Journal lines and Production Journal Lines within BC and that the handheld logic will also use the same code being used in BC. If the handheld logic doesn't use BC logic, additional hours will need to be estimated for the handhelds.

Option	Category	Description	Complexity	Estimate
A	Customization	Replicate the "Default Qty per Pallet" on the Item card and function during output. Currently, the system will duplicate the output quantity if the forklift operator scans the label twice. We will want to fix this issue in BC.	Medium	20 hrs.

2.4 Quality Control

2.4.1 Quality Control Integration

[CUSTOMER NAME] is using a standalone QC software called QCBD. Innovia's Power App Team is currently working with [CUSTOMER NAME] on automating MS Access with NAV.

Development Notes: The Power App team should estimate this if [CUSTOMER NAME] wants to continue using the power app.

Option	Category	Description	Complexity	Estimate
A	Customization	Integrate with current standalone QCBD solution.	High	TBD
B	ISV	Identify a suitable ISV replacement (TBD)	TBD	TBD

2.4.2 Process Data Collection

Process data collection might be necessary to account for if the QC module is implemented or integrated into Business Central. **COAs will also need to be brought over into BC.**

Development Notes: These hours are not for the integration, just for adding supporting fields for the integration to write to.

Option	Category	Description	Complexity	Estimate
A	Customization	Process data collection might be necessary to account for if the QC module is implemented or integrated into Business Central. The QC team constantly compares tare weights on scales, keeping track of temperatures and flow heads. These records are not tagged to a production order but to pieces of equipment and storage. Ensure that the data collection module can be assigned to Equipment, Work Centers, and Machine Centers. For example, scale weight is recorded every 30min and added to an Excel spreadsheet. The solenoids on the flow heads might record wrong values and need adjustment.	Medium	16 hrs.

2.5 Purchasing

2.5.1 Vendors

Vendor Approval requirement

Development Notes: Estimate does not include integration from QCB to the Vendor Item Catalog. It only includes time for manual entry of new fields and adding error logic error on the sales lines.

Option	Category	Description	Complexity	Estimate
A	Customization	Vendor approvals are done by Quality Control using QCB. The "Vendor Items Catalog" in BC is then populated by item to show its approved status. BC will not populate an item on a sales order if the item is not marked as approved in the Vendor Item Catalog. Users will get a warning if they try to enter the item manually on an order	Low	8 hrs.

Send e-mail confirmations via e-mail to multiple individuals

Option	Category	Description	Complexity	Estimate
A	Customization	[CUSTOMER NAME] would like to send e-mail confirmations via e-mail to multiple individuals. The payment terms need to be included as part of the attachment.	Medium	20 hrs.
B	ISV	Zetadocs Capture and Delivery (TBD)		

Vendor minimum quantity requirements

Option	Category	Description	Complexity	Estimate
A	Customization	Some vendors require a minimum quantity per order. This information is not in BC. The system can block the release of orders for less than a specified minimum.	Medium	12 hrs.

2.6 Warehouse

2.6.1 Mobile Warehouse Solution

Keep or replace current WMS solution – Lanham and Associate

Development Notes: This will not include upgrading Lanham data, just installing new extensions and migrating any data using Rapid Start.

Option	Category	Description	Complexity	Estimate
A	ISV	Keep and upgrade Lanham and Associates. (TBD)	High	TBD
B	ISV	Identify a suitable ISV replacement such as Tasklet Factory or Insight Works (TBD)	High	TBD

2.6.2 Receiving Process

Backorder customization

Option	Category	Description	Complexity	Estimate
A	Customization	[CUSTOMER NAME] might need a "Backorder" customization. Further discussion will be required. Warehouse employees must adjust Purchase Orders when the supplier does not meet the total quantity ordered. Each time the amount received doesn't match the amount requested, a prompt can be presented to confirm if the transaction should be treated as a backorder.	Medium	40 hrs.

Need for checking the Ship-from location per order

Option	Category	Description	Complexity	Estimate
A	Customization	Quality Control needs to be able to accept or reject the ship-from location of the vendors. If a vendor has a rejected ship-from location, the receiving warehouse employee should get an automatic warning to confirm the location. This customization might need to be extended to the handhelds.	Low	12 hrs.

2.6.3 Picking Process

Ability to handle the request from customers for a maximum number of different lots per product and shipment.

Development Notes: Estimate is for adding the Max Lot. Field to the Customer table and supporting logic to the item tracking. It also includes adding the Pallet Type field to the Customer and basic related sales order, shipment, and invoicing tables and a handful of related pages.

Option	Category	Description	Complexity	Estimate
A	Customization	Some customers ask for a maximum number of different lots per product and shipment (Ex. Deliver a maximum of three different lots per shipment). NAV was customized to handle this scenario at the pick order. It will need to be replicated in Business Central. Additionally, a Pallet Type requirement was added to the Customer card. It will need to be replicated as well.	Medium	48 hrs.

2.7 Hedge

2.7.1 Hedge Module Development

The Hedge module was developed in NAV. It will need to be replicated and possibly enhanced in Business Central.

A few customizations to the Blanket Sales Order related to hedging and pricing need to be replicated.

Development Notes: The estimate below includes 7 reports, new tables, fields, and supporting logic.

Option	Category	Description	Complexity	Estimate
A	Customization	The Hedge module was developed in NAV. It will need to be replicated and possibly enhanced in Business Central	High	120 hrs.

2.8 Accounts Receivable

2.8.1 Credit Management

Development Notes: First option should be to look at ISV. If needed, we can get more information about the process and estimate ourselves.

Option	Category	Description	Complexity	Estimate
A	Customization	Build a basic Credit Management solution	High	TBD
B	ISV	Identify a suitable ISV replacement (TBD)		

2.8.2 Sales Taxes

[Customer] uses Avalara AvaTax (ISV) to calculate Sales Tax per line when the order is released and again at the time of invoicing.

Option	Category	Description	Complexity	Estimate
A	Training	Demo/Use standard Business Central functionality.	Medium	4 hrs.
B	ISV	Identify a suitable ISV replacement (TBD)		

2.8.3 Reminders

Currently, Reminders & Finance Charges are set up and ready to be used in their current system, but it is not being utilized.

Option	Category	Description	Complexity	Estimate
A	Customization	There is a customization currently that, when a reminder is sent manually (Using SMTP), the system looks first for the customer contact list for that account and, if there are no contacts there, then it will go back and look for the contact in the customer card.	Medium	20 hrs.

2.8.4 Sales Commission

Sales Commission Module

Option	Category	Description	Complexity	Estimate
A	Customization	Add minor modifications to exiting Commission BC logic.	Medium	16 hrs.
B	ISV	Identify a suitable ISV replacement (TBD)		

2.9 Accounts Payable

2.9.1 Invoicing Process

There is a customization on the Purchase invoices.

Development Notes: Estimate is not for full Freight Charge tool, just the new fields to be added to the purchase tables and pages.

Option	Category	Description	Complexity	Estimate
A	Customization	There is a customization on the Purchase invoices (Two fields: Order type and type of business) to link Purchase Orders to Sales Orders for Freight charges. Freight is treated as Item Charge and distributed by weight for all purchase lines.	Low	4 hrs.

2.9.2 Vendor Payments

Additional fields need to be added to the payment journal.

Option	Category	Description	Complexity	Estimate
A	Customization	Currently, there is customization in the payment journal precheck report. The only changes were the addition of the description and External Document Number.	Low	6 hrs.

2.10 Credit Card Processing

2.10.1 Credit Card

[Customer Name] currently uses ChargeLogic for their credit card processing on their website.

Option	Category	Description	Complexity	Estimate
A	ISV	Keep and upgrade ChargeLogic integration.	High	TBD
B	ISV	Identify a suitable ISV replacement (TBD)		

2.11 Workflows

2.11.1 Approval Workflows

[Customer Name] is using a solution called Agiles Workflow.

Option	Category	Description	Complexity	Estimate
A	Training	Demo standard Business Central functionality.	Medium	6 hrs.
B	ISV	Power Automate (TBD)		

2.12 EDI

2.12.1 EDI Integration

[Customer Name] has a module from Sana to process EDI orders. However, it has been set up for FTP transactions only. Their trading partner sends the orders in a flat file using FTP. [CUSTOMER NAME] must open the file and transpose the data in NAV manually.

Option	Category	Description	Complexity	Estimate
A	Training	Continue current process.	Low	0 hrs.
B	ISV	Fully configure EDI to get the full benefit of the solution (TBD)	High	

2.13 Security

2.13.1 Security Solution

Using Easy Security which is not available in BC SaaS.

Option	Category	Description	Complexity	Estimate
A	Training	Demo standard Business Central functionality.	Medium	8 hrs.
B	ISV	Identify a suitable ISV replacement (TBD)		

2.14 Business Intelligence/Reports

2.14.1 Reports

[CUSTOMER NAME] is currently using SQL Reporting Services for numerous reports.

Option	Category	Description	Complexity	Estimate
A	ISV	Identify a suitable ISV replacement such as JetReports or PowerBI (TBD)		TBD

2.15 Rail Orders

Replicate all customizations related to rail orders. Replicate fields (Rail Car, Rail Car No., and Waybill No) at the Purchase Order Line level and replicate tables Rail Car (50018) and Rail Car Events (50830). Make sure to include the "Split Car" functionality.

Option	Category	Description	Complexity	Estimate
A	Customization	Replicate from NAV	Medium	25 hrs.

2.16 CHEP Report

Replicate the Item Packaging (50013) table and logic to create the CHEP report. For outgoing CHEP items, the system Should automatically add new sale lines for the expected number of pallets or totes to ship and an additional line for their weight.

Option	Category	Description	Complexity	Estimate
A	Customization	Replicate from NAV	Medium	25 hrs.