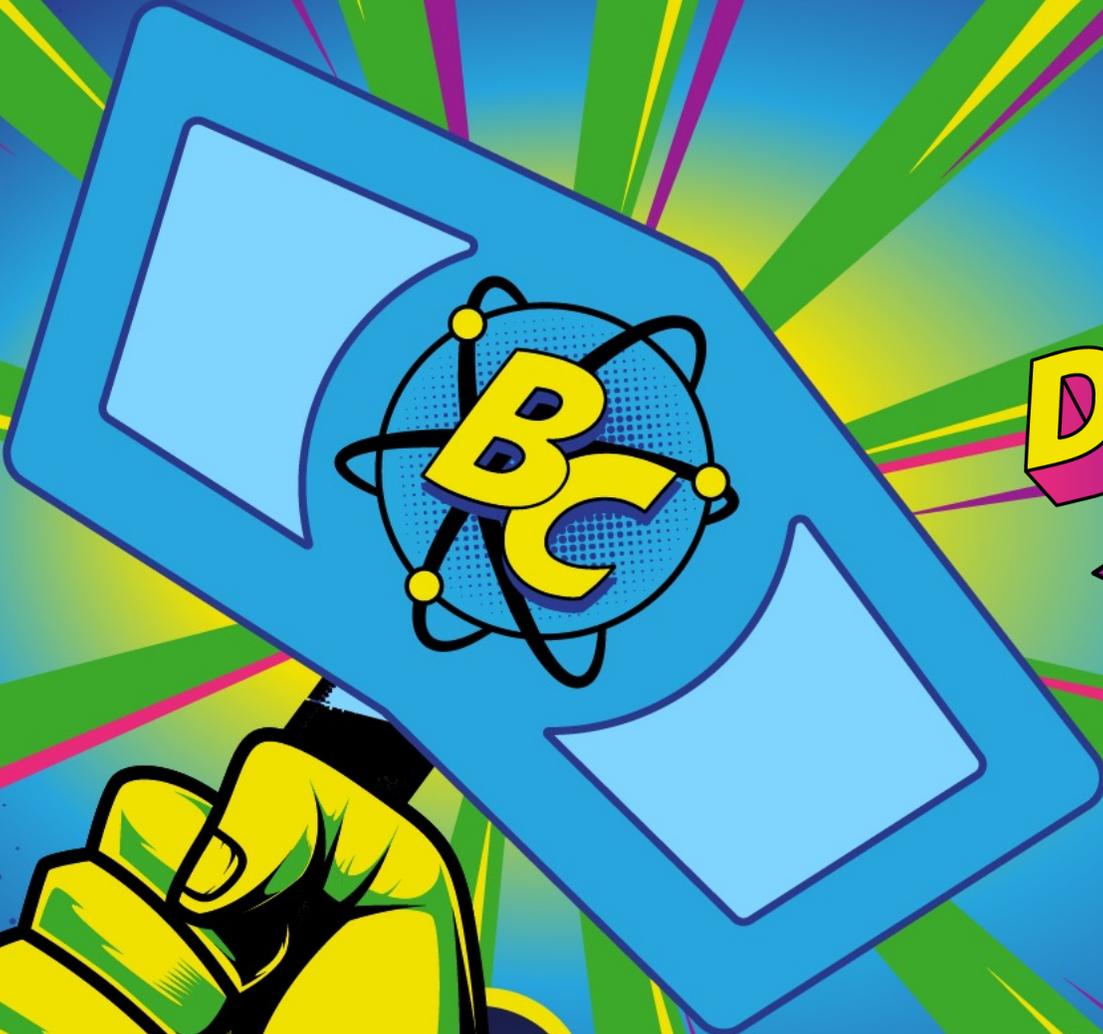


A DYNAMICSCON PRESENTATION



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DYNAMICSCON VIRTUAL

MARCH 2023

**BUSINESS
CENTRAL**

DYNAMICSCON.COM

How to prepare for your BC implementation and save yourself time and money.

Whether new to Business Central, upgrading or reimplementing
your pre-project prep work can save you time, money, and stress.



CIOs should not accept the status quo of managing critical processes and data within their organizations.

“With end-to-end process automation, any company can make the best of its enterprise applications, connecting process steps across technologies, platforms and business silos. This enables **greater IT alignment with the entire business strategy.**”



7 Ways to Build Into Your implementation Team



Get to know each other.



Provide opportunities for innovation and reward participation.



Celebrate together.



Make it count.



Listen.



Give praise where praise is due.



Build supportive teams.

Maximize The Efficiency of Your ERP System

Level 1:

- **Ad Hoc processes.**
- At this stage “everyone just does their best to get the job done.” Here there is no standardization and employees managing functions are reactive without proper documentation. No service level agreement.

Level 2:

- **Defined processes.**
- Everyone has a description of what they should do, but no automation or tracking is in place to ensure it will actually get done. There is an initial service level agreement, with some documentation and standardization, but again without any consistency.

Level 3:

- **Automated processes that are defined in detail.**
- With a comprehensive service level agreement, the company can consistently see business results. Additionally, all processes are completely documented and staffing levels are able to be reduced.

Level 4:

- **Lights out automation is extended to areas that were formerly exceptions.**
- Standardized processes are in place and are fully automated, which results in further staff reductions.

Level 5:

- **Visionary extension of automation to the widest scope across company boundaries.**
- This final level sees end-to-end automation, and automation across the supply chain. Your company has complete visibility and control in all stages of all processes.

Key take-aways

- Be The Spark
- Initiate Change



Where am I?

What database are you in PROD, TEST, DEV?

What company are you in? Some customers have 50+ companies in a database

How did I get here?

List the steps you took before getting the error message/issue

Add screen shots

What are my expectations?

What was the expected result from the business process you are having trouble with

Communicate your expected response or resolution time

work
Smart
nothard

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- Don' be afraid of the phone
- Always leave voicemail
- Provide reminders

- Follow up
- Monthly recaps and look ahead
- Ask for regular feedback

- Over communicate
- Document as much as possible
- Be Prepared

Be Ready For Change



User Adaption



**Promote
Positive
Statements**



**Be the
“NAV-angelist”**

Upgrade 2 Success!

Tie Your Business Solutions To Your Business Objectives

Outline your objectives

Create a strategy based on your objectives

Identify – Classify – Prioritize

Build Your Team

Steer your upgrade in the right direction

Build the dream team

Be selective!



Ensuring Your Team Can Sustain The System

Train not Test

Physically Sign Off – goes along way

Knowledge Transfer

Trainer – trains the training team (super users)

Training Team – trains the end users





Train & Educate Your End Users

- This is not just a because I said so project
- Teach them how and why
- Make education on going

Go Live



**Prepare The
End Users
Your Cut
Over Plan
Go Live!**

Prep Check List

Build Your Team:

- Project Manager (Team Lead):
- Financial:
- Accounts Payable:
- Accounts Receivable:
- Purchasing:
- Sales:
- Warehouse:
- Receiving:
- Shipping:
- Inventory:
- Manufacturing:
- Planning:
- Production:
- Quality:
- IT:
- Executive Sponsor:

Process Mapping:

- Daily Tasks
- Weekly Tasks
- Monthly Tasks
- Quarterly Tasks
- Annual Tasks

User Acceptance Check Lists:

- See Example in PowerPoint

Train the Trainers

- General Training Tips and Tricks
- Searching, Filtering, Bookmarking
- Personalizations
- Role Center (Home Page)
- Departmental processes & scripts

House Cleaning - Purge & Merge

Master Data

- Customer Cards
- Contact Cards
- Vendor Cards
- Item Cards

Transactional Data

- Quotes
- Open Sales Orders
- Open Purchase Orders
- Open Receipts
- Open Warehouse Documents

Other Tables

- Payment Terms
- Payment Method
- Shipping Agents
- Shipping Methods
- Dimensions
- Change Log
- Price Lists

Tools to help:

- Screen Capture:
- Video Capture:
- Dictation:
- Rapid Start
- ClickLearn
- Web Meetings:
- Phone Connections:
- Email:
- Instant Messaging:
- Groupware - Teams :
- Other:
- Other: