TEMPLATE-BASED MIGRATION WITH UNBOX

CONTENTS

UNBOX

Abakion Unbox is a project format for migration to Dynamics 365 Business Central.

Unbox is a complete migration project, including data migration and training. It is based on templates, so we can implement it quickly, simply and for a fixed price.

We move you from your old ERP system to Dynamics 365 Business Central. We replace your customizations with standard apps. You get a complete standard setup. You receive training in the use of the solution. And it takes only two weeks from start to finish.

If you are coming from an earlier NAV, there will even be only one day's downtime, but you can happily choose Unbox even if you are coming from a different ERP system.

Unbox is what we like to call a proper migration, meaning that we don't just decant old failings into the new version. There is no comparison between this project format and sending your NAV to an upgrade factory abroad.

The idea is not to cut corners, but that the project is so well organized that it can be done quickly.

And then we do it for a fixed price.

The result of the project is a Microsoft Dynamics 365 Business Central as a Cloud solution (i.e., genuine Software-as-a-Service).

The solution includes apps that make it possible to avoid most customizations, so, with the project completed, you will also be change-ready.

After the Unbox project, you will have a combined subscription with Abakion comprising the Dynamics solution and the apps included in Unbox.

PROJECT FORMAT

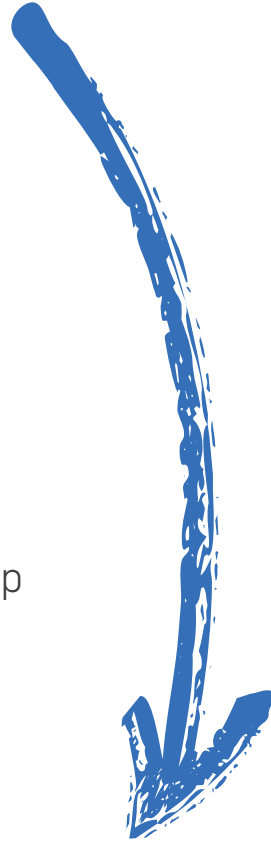*If you want to make your ERP project manageable and predictable, Abakion Unbox is for you.*

YOUR OLD ERP SOLUTION

unbox.

Unbox is a project format in which we deliver Business Central with standard apps and a standard setup that we map to your business requirements and that we migrate the data from your old solution to.

Microsoft Dynamics 365 Business Central
+
Apps from Microsoft AppSource

| Scoping Planning | ▶ | Data migration | | Support |
| Training | | Test | Go live |
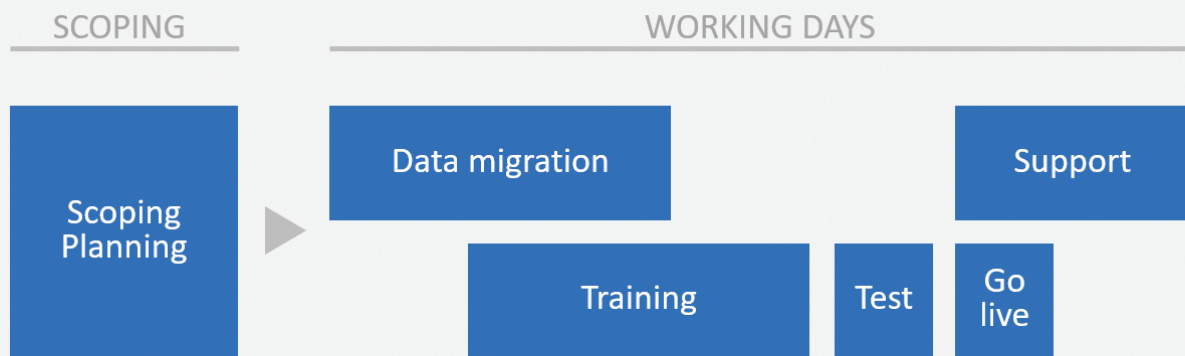
HOW WE DO IT

The process begins with a **scoping day**. This is a self-contained activity that aims to find out whether Unbox is right for your company. We map out your requirements and make a project plan.

After the scoping day, you can decide whether you want to proceed with the actual Unbox implementation project, in which case you and our project leader will block out two weeks in the calendar when it will all happen.

We will ensure that the **workdays** are held as a block. The project mustn't extend over a longer calendar period and burden your organization for months. We will make sure to book a timeslot when all project participants can set aside the necessary time. And yes, it's a packed schedule that will take us through the entire project in just two weeks, but the fact that you are only burdened with it for a short time takes a weight off the organization's shoulders.

The two working weeks start with **data migration**. We migrate data in a smart way; we use a best-practice setup in the new solution, and we validate the data in the new solution. That means that all data will be correctly mapped, providing the new solution with cleansed data.

Solution-wise, we replace customizations in the old solution with apps in the new one. Not being locked into old customizations gives you change-readiness. From now on, you can keep up with new versions from Microsoft without having to go through a migration project.

Four days are set aside for **training**, which follows a set concept that will take you through eight Business Central modules.

We round off the workdays by **testing** the solution and making it **live**, and it is then ready for your staff to come in to work. In the days that follow, we focus on **user support**, which ensures that staff get off to a good start.

An Unbox project is the delivery of a Dynamics solution with standard apps and a standard setup that we map to your business requirements and that we migrate the data from your old solution to.

STANDARD COMPONENTS

We have prepared and standardized a lot of components in advance, and that means we can unpack it all in a few days when we come out to you.

In the Unbox concept, we use a standard setup that gets us to the finish line quickly. And we utilize standard apps that we at Abakion have committed ourselves to servicing and developing.

This maintains your change-readiness and means that you will never need to go through a migration project again, because from now on upgrades will be simple updates to the solutions from Microsoft and Microsoft partners.

Standard setup

It's just like buying a prefab house. The whole house consists of standard components, but then again, as the customer, you have the opportunity to make choices along the way that will make the house your own. We use same approach in an Unbox project.
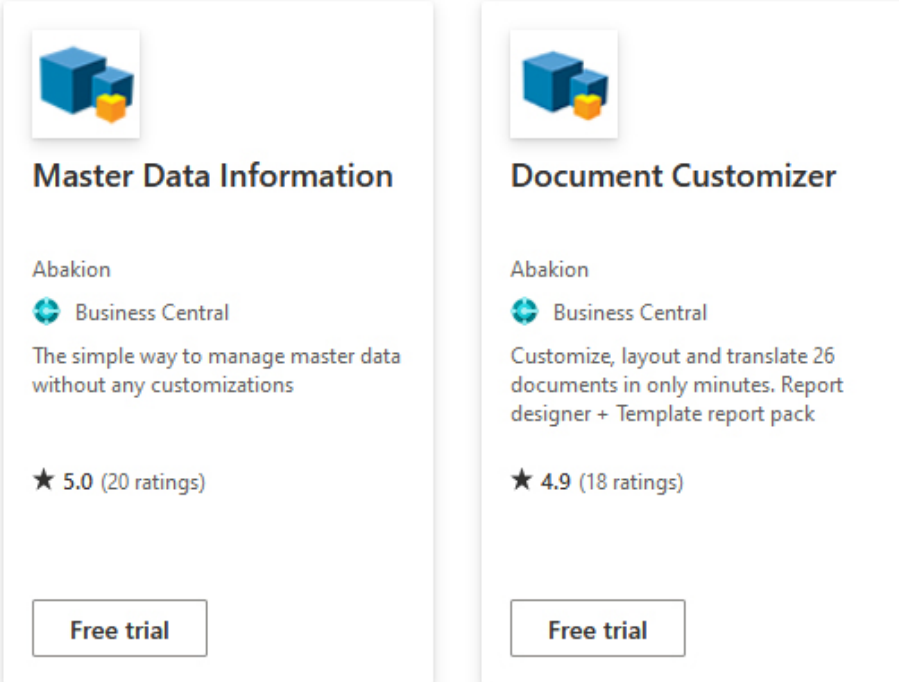
- We have established a best-practice setup. There are many parameters that need to be set up in order to make a Business Central operational. A lot of it is the same every time, and there is no reason to do it by hand each time.

- The core of the setup is a standard chart of accounts that our customers have been using for many years. Some are a little sceptical at first, but the great majority look at it and see that it is just as good as their old chart of accounts – even though some things may be expressed differently.

- We have standardized the whole setup. That means that around 150 tables are set up in advance. This saves a great deal of work.

- There is a lot of business data that can be set up in advance, too. Is it all the same to you whether a payment condition is called "8 d", or "8 days", or something else again? The same goes for language codes, for example. If you have a language code called "EN", we will be sure to match it to the language code called "ENU" in our standard setup.

We have no doubt that our best-practice setup works as intended, because we have used it with many customers over recent years. We know that most companies fit our standard.

But, of course, you are welcome to have a look at the standard chart of accounts, say, before deciding on an Unbox project, so you can make sure you recognize yourself in the standard setup.

You can certainly add to the setup and change it afterwards – you can add accounts to the chart of accounts, for example – but you cannot make changes to the core of the standard setup.

Master Data Information

Abakion

Business Central

The simple way to manage master data without any customizations

★ 5.0 (20 ratings)

Free trial

Document Customizer

Abakion

Business Central

Customize, layout and translate 26 documents in only minutes. Report designer + Template report pack

★ 4.9 (18 ratings)

Free trial

Standard-apps

Your new solution will contain five standard apps. When we talk about "apps", we are referring to what in the old days were called add-on modules.

Of the five standard apps, two are essential to complete the project within the short timeframe of an unbox project.

The two apps are **"Master Data Information"** and **"Document Customizer".**

With the two apps, you avoid having to make customizations. That's one of the reasons why the majority of our customers have been using these apps for years – simply because they take the place of many customizations.

By far the majority of customizations are about the need to manage data on "something" and change the content and layout of documents.

These are precisely the three requirements supported by the three apps:

- **"Master Data Information"** ensures that you can manage data on items, customers and vendors without creating custom fields

- **"Document Customizer"** allows you to define your own layout on invoices and other documents

All apps are installed in the Business Central solution, but it's important to note that they do not work in quite the same way as old-fashioned modules.

Previously, such modules would in fact be changes to the solution's code, which is a problem when time comes to upgrade the solution.

Today they are apps published on Microsoft AppSource. Your solution can therefore be version-upgraded in the future without any problems. Abakion will ensure that these apps always work as intended in new versions.

YOUR SUBSCRIPTION

When your Unbox project is completed, you then have a combined subscription to all the Unbox components:

- **Microsoft Dynamics 365 Business Central (SaaS)**
- **Choice of five Abakion Apps from Microsoft AppSource**

The subscription includes up to five Abakion apps, but does not include services to help you get started with the apps apart from the two weeks' work described in the Unbox project.

The subscription also includes ongoing upgrades to new versions of both Business Central and the apps. **This means you need not go through a migration project again**. The Unbox project will simply be the last one.

You also have the option of purchasing a support subscription so that your users can call or email our support team for operational assistance. This is a service you can either buy on demand or take out a subscription to.

Extra apps

Your Abakion Go subscription actually includes five apps of your choice from our long list of apps on Microsoft AppSource.

You will adopt the first two apps as part of the Unbox project, but afterwards you can adopt up to three apps additionally as a little present from us.

It is an extra guarantee to you that if a special requirement arises in future, you will be able to see whether an app exists that can meet the need.

♥ POPULAR

App Bundle
`Customization tool` `Data tool`

Pick any 5 apps for Business Central, and get all the functionality you would traditionally hire a consultant to customize.

Assign Quantity
`Inventory` `Manufacturing` `+2`

Fulfill all Sales Orders intelligently and provide fast and reliable order promises to customers.

Flexible Forecast
`Planning` `Sales`

Overview forecast, demands, supplies and history in one view. All in one line per item.

Global Master Data Sync
`Data tool` `Finance` `+4`

Centralize and manage your Master Data in one place and synchronize to all companies in Business Central subscribing to the data.

★ FREE

Graphical Inventory Profile
`Inventory` `Manufacturing` `+3`

Predict and prevent supply issues. Get an overview of the future inventory status for each item in Business Central.

Intercompany
`Data tool` `Finance` `+3`

Minimize manual tasks with easy, automated and feature-rich order integration between multiple companies.
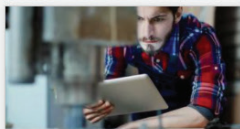
Production Order Cost Calculation
`Finance` `Manufacturing` `Planning`

Find discrepancies and correct master data. Compare realized production order cost with the cost from Routing and BOM.

Purchase Order Management
`Planning` `Purchase`

Gain control of the purchasing process and get an actionable overview of all requests that are unresponded by suppliers.

Reverse Planning
`Planning` `Purchase`

Control stock levels and get action-based suggestions on supply and demand. Spot items that cannot be delivered within lead times.

Sales Configurator
`Manufacturing` `Planning` `+2`

Configure Item Hierarchies for Sales Orders efficiently without creating new item numbers for each Sales Order Line.

Shipping Manager
`Inventory` `Sales` `Warehouse`

Create waybills and connect to shipping brokers to manage shipping of your deliveries for your customers.

Sales Container Handling
`Inventory` `Sales` `Warehouse`

Assign sales order lines and manage containers to pack and ship all lines in one go.

Shop Floor Mobile
`Manufacturing` `Planning`

Register consumption and output easy with flows. Get actionable overviews of operation, capacity load and production order lines.

Shortage on Demand Orders
`Manufacturing` `Planning` `Sales`

The planning tool for optimizing fulfillment of Sales Orders to avoid partial deliveries by managing shortages and moving delivery dates.

Subscription Management
`Finance` `Sales`

Manage Subscription-based Invoicing on Customers in a simple and efficient way in Business Central.

VAT Rate per Dimension
`Finance`

Manage partial tax and multiple rates per account with VAT Rate per Dimension.

Warehouse Mobile
`Warehouse`

Easy registration of warehouse

★ FREE

Use Dynamics
`Finance` `Inventory` `+5`

Get contextual video user guides

★ FREE

Created-by on Documents
`Finance` `Purchase` `Sales`

★ FREE

Search Items
`Purchase` `Sales`

Search Items enables you to search

UNBOX WEEK 1						UNBOX WEEK 2					

Scoping Planning

Task before / Task before / Task before

Data / Data / Data / Data / Data

Training / Training / Training

Training / Test / Go live

Task after / Task after / Task after

Task after / Task after / Task after

Go live support / Go live support / Task after

Blue: activities included in Abakion Unbox

Green: activities outside of Unbox, but in the same project plan

PROJECT FORMAT

The Unbox project format begins with us jointly assessing whether Unbox is the right choice for you. We call this a **scoping day**.

The next step is the **migration project** itself, when we spend a week and a half at your company to carry it all out. Then, you will **go live** with the new solution.

In the following sections, we describe in detail exactly what each of these activities involves.

Dedicated project manager

Right from the start, we will assign you a project manager who will keep tabs on all the activities – those within the Unbox deliverable, and also any agreed between us outside it.

Some companies need a little more than Unbox provides, and then we will agree a project including both Unbox and some extra deliverables – and the project manager will make sure it all comes together.

Project management is a service that normally costs a lot of money on a project. So, it is an exceptional advantage for it to be included in the price of the Unbox package.

SCOPING

The scoping day makes it clear to everyone what exactly the Unbox project will include.

The scoping day is attended by the project manager together with a business consultant from Abakion who will be responsible for the training.

It's important to us that you know what you are taking on and that we are both sure your company is right for the concept. That's why we hold this scoping day, when we run through the project and ask the relevant questions. The purpose of the scoping day is to map out what, if anything, your company requires over and above Unbox.

Together, we will examine whether there are any special circumstances in your company, so that we don't come up against any surprises along the way. The scoping day isn't a guarantee, but it is an effective tool for both of us.

The scoping day culminates in a project identification document, which is actually the same as we use on bigger, tailor-made projects, so it can be used irrespective of whether you proceed with an Unbox project or opt to change track to another project format.

The scoping day is priced separately, because you are not committed to anything whatsoever apart from that day. If together we decide that Unbox is the right thing for your company, we will conclude an agreement on the Unbox project itself.

Project plan

We now draw up a project plan covering both Unbox and any tasks additional to Unbox that you would like to be included, either before or after the Unbox service.

Unbox can certainly stand alone if the package contains everything you need.

But some companies need to combine Unbox with other services, and that can easily be done. If there are a lot of things you want to be included in the project in addition to Unbox, you can choose to treat Unbox as a subdeliverable within your project.

Pre-Unbox activities

It may be relevant to schedule activities prior to the Unbox project if there are business-critical things that it is important to have in place before go-live.

Activities prior to an Unbox project may include important integrations. It may be that you want to ensure that there is a connection to the warehouse hotel, because that will be business-critical when you go live.

It may also be that you want to hold a preparatory workshop on the chart of accounts and dimensions if, for example, you haven't worked with dimensions before.

There may also be preparatory work that you need to carry out yourself – data cleansing, for example. Or you may need to perform a test export from your old system, check that the data can be exported and sort out what data you want to transfer to the new system.
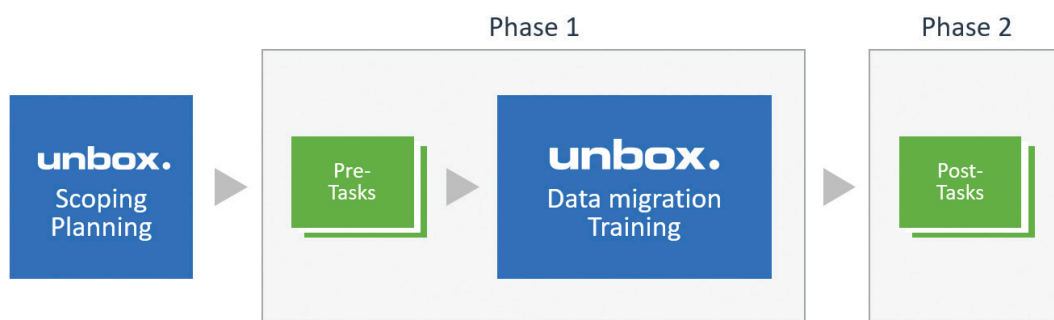
Planning workshop

Next, we hold a planning workshop together. The project manager and the business consultant who is to provide the training will come to visit you, and you will spend three hours reviewing the Unbox scoresheets together.

The Unbox concept incorporates a high degree of flexibility. You can choose for yourself which business processes you want to be trained in and what data you would like to have migrated from your old ERP solution.

The procedure is that we go through two Excel spreadsheets together and tick off your training and data migration choices. The Unbox project includes five days of data migration, four days of training and one day of testing, and we have translated this into points so that you can prioritize how you want to use our time.

You can choose a total of 100 points. Some things cost more points than others, and the 100-point limit ensures that we can manage it within the allotted workdays. It is also plenty for the vast majority of companies.

You mustn't get too hung up on the points. You will get all the training we can fit into the four days. The scoresheets can help you prioritize. As a rule, 100 points correspond to four days, but many people opt for 70 or 80 points-worth of training so that they can go into more depth because they are starting from a different place.

TRAINING

Training sessions are managed by our business consultant, who will be on site at your company and will provide four days of training to help your company find its way around the new solution.

The training will follow the prioritization agreed between us in the scoresheets, and we have standard, printed teaching materials for all modules, which will be handed out to participants.

Testing

After the four days' training, we hold a day of testing. Project participants join together to perform a user test, which is the last stage before go-live.

In the morning, participants receive a copy of the finished solution, in which they can test away. They create sales orders, post entries and do everything necessary to ensure it all works.

If there are any amendments, our consultants will perform them in the course of the day, so we can round off the day by running a definitive go-live batch job.

DATA MIGRATION

The data migration is managed by our data consultant. A lot of the work is done by the consultant alone once we have access to your old ERP system or a data export from it.

If you previously had Dynamics NAV

If you have a previous version of NAV, we use Abakion's migration tool for NAV, with which all the work can be performed in your old NAV solution. This means that your old NAV will not be locked. You can carry on editing both master data and transactions up to the final workday.

If you are coming from an ERP system other than NAV, we will export the data on the first day and carry out the work in Excel. This means that the old ERP system will be locked for edits. All changes to customers, items, vendors etc. must be handled manually during the days the work is carried out.

Of course, the data consultant also needs to draw on your departmental representatives when data has to be mapped or cleansed, or when data has to be exported from the old system.

The departmental representatives must be ready to make decisions along the way and to carry out mapping of data. We will assist with the mapping, but of course the departmental representatives are the ones who must make the decisions about the mapping.

More specifically, mapping means that we match data in your existing data set with the best-practice data that your new solution comes with. Your new solution contains a standardized setup, so there is bound to be data that has to be 'translated' when it is transferred.

For example, it may be that payment conditions or language codes have different names in the old and new solutions. If the old solution has a language code called "EN" and the new one has "ENU", the two codes must be matched so that the migration tool knows it is the same language code.

Chart of accounts

Your Finance representative should get started on looking at the chart of accounts as early as possible.

The new solution comes with a standard chart of accounts, and the finance representative needs to be involved in either entering opening balances or mapping accounts in the old chart of accounts to those in the new one. This must be done early in the process, so that we are ready to create an opening balance in the new system.

Custom fields

At the start, the data consultant will move your custom fields on customers in the old solution to master data fields in the new solution.

We match all the data fields in the old solution to fields in the new solution. If you have had fields created in the old solution to record information that is important to you, we must of course find a good place to store that information in the new solution. The tool for this is called Master Data Information.

This is an app for Business Central that enables us to create information codes on items, vendors, customers etc.

They are not "traditional" fields, because we do not want to alter the core of the solution and destroy the possibility of easy upgrading. But you will have the ability to record all the information you need to store.

If you record "colour" on items, for example, we will create an information code where you can store the colour of an item in the new solution, because there is no "colour" field in the standard solution.

Master data

Then, the data consultant begins moving master data on customers, vendors, items and contacts. This is where most of the master data gets transferred.

This does not actually prevent editing of master data in the old system if you are coming from a Dynamics NAV, because we can easily transfer amendments to master data afterwards.

Fixed assets and inventory

After that, it is the turn of fixed assets – and, if you have manufacturing, we also transfer routes, bills of material and work centres at this point.

Before we finish, you may need to carry out an inventory count. You will be involved in deciding whether this is relevant. If the inventory matches up well in the old system, we can just transfer the data to the new system, but if you have a lot of discrepancies in the inventory, we recommend an inventory count so that you have precise figures in your new system from the start.

Ready for go-live

On the penultimate day, we stop entry of transactions in the old NAV system. If you are coming from another ERP solution, we will have stopped entry when we exported the data to Excel earlier in the week.

The testing day is a closed day, when no one can enter or edit data in the old system.

By this point, the chart of accounts has been mapped; if you are coming from a NAV solution, we can create opening balances in the new system by clicking a button in the migration tool. If you are coming from a different ERP system, the data consultant will have prepared the opening balances the day before.

We run a complete opening on the new system in the morning, and the data consultant then takes a copy of the solution that can be user-tested by all participants during the day.

To round off the day, any amendments arising from the day's testing are performed, then we repeat the opening—and, with that, the new solution is ready to be made live.

The new solution is now live and ready for staff to come in the following day and work in the new solution.

Conditions

There are some conditions that you need to be aware of:

- The code in the Dynamics solution cannot be edited.

- The basic setup and the chart of accounts come from Abakion's best-practice setup, and this is a pre-requisite for the work carried out under the Unbox project. Not until after go-live can any changes be made.

- Client-specific customized data on customers, vendors and items in the old solution will be transferred to "Master Data Information" to the extent possible. If there are requirements that cannot be supported in the new solution, you must be prepared to adapt your processes so that you can use the standard functionality.

A lot is included in the migration, but there are also some things that are not included, and you must of course be aware of them. They are:

- Permission sets. Users will be set up as superusers. You can alter user permissions afterwards.

- History, i.e., posted entries on customers, vendors, general ledger, items, fixed assets and jobs.

- Floating items, i.e., items received or sent but not invoiced/posted.

- Production orders.

- Client-customized fields with logic.

SUPPORT

Staff are now up and running with the new solution.

In the early days, there are usually a number of practical questions about the operation of the solution. Our business consultant who presented the training is therefore also on site on the day you go live with the solution. Of course, this presupposes that you follow the Unbox schedule and go into operation on the Wednesday.

If you choose to go live on the Wednesday of our Unbox schedule, we have an added bonus for you: we will then give your users priority support on the Thursday and Friday. This is an extra incentive to get the job done on schedule.

If you choose to move the go-live to another day, the support days cannot be moved with it, but you can always purchase support on demand or sign up for a support agreement.

WHAT IT COSTS

All that remains is to talk about the price.

If we were to deliver the content of the Unbox project in the traditional way, it would cost between EUR 40,000 and 70,000.

That is the price of an ordinary migration project with us. We have a price reckoner in Excel that we can key everything into with you, if you would like to see for yourself.

We have standardized and packaged everything so that the work can be carried out quickly - and for a fixed price. And we use only standard components, so you will always be change-ready and so that you can subsequently keep up with new versions without the need for migration.

The standard price for a scoping day is **EUR 2,000** excl. VAT/Tax.

And the standard price of the subsequent Unbox project is **EUR 10,000** excl. VAT/Tax.

Call us on **+45 70 23 23 16** - and together we'll draw up a plan to get you up and running with Business Central.

Thank you for reading about Abakion Unbox.

If you would like to know more, please visit our website for further information.

You are also most welcome to ring us for a chat.

We hope to hear from you.
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