DSWi

Helping Your Business Grow... That's Our Business

Dynamics 365 | Power BI | Azure
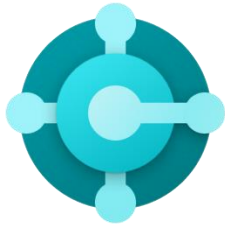
Data Migration Bootcamp

for

Microsoft Dynamics 365 Business Central

4 Hours | US $699

CONGRATULATIONS on choosing Microsoft Dynamics 365 Business Central as your next business system! Thousands of companies across the world, big and small, trust it every day for an accurate, reliable, compliant & easy-to-use experience. At DSWi, we love Business Central so much that we don't just implement and support it for our clients, we use it to power our own business.

How does this bootcamp work?

If you are evaluating this bootcamp, you are likely planning to implement Business Central yourself with some help here and there, and you are looking to keep costs low. We respect that. Microsoft has done a good job making Business Central intuitive, and the built-in setup wizards and product documentation help too.

In this **online bootcamp**, our experts will help you stay true to your DIY (do-it-yourself) goals by **teaching** you **how to** use the <u>two</u> main **Data Migration tools** for loading your data into Business Central:

1. RapidStart Configuration Packages
2. Edit-in-Excel

All instruction will be done online with Microsoft Teams (or a similar teleconferencing and screen-sharing tool) **using prepackaged sample data created by DSWi** to simulate the types of business data a company would want to import into Business Central.

Using our prepackaged sample data allows you and our instructor to focus on teaching you how to use the migration tools in a 4 hour session.

Bootcamp Prerequisites

To ensure that you get the most value from our Data Migration Bootcamp, we have prepared a list of prerequisites:

- You must have access to a Business Central environment online (recommended) or On-Premises environment; An active license (or unexpired trial license) is required
- You and/or another bootcamp attendee from your company must have administrative privileges to your Business Central environment ("SUPER" permission set) allowing you to create new companies, import data, etc.
- The Edit-in-Excel tool requires that you have an active Office 365 subscription associated with the same e-mail / user login that is associated with your Business Central user(s). Qualifying Office 365 plans are: Microsoft 365 Business Basic, Business Standard, Business Premium, E3, E5, or F3.
  - The Edit-in-Excel function is automatically configured for Business Central online (sometimes referenced as Business Central Cloud). If you are on an On-Premises deployment of Business Central, or a private hosted deployment of Business Central, please work with your provider to ensure that Edit-in-Excel in configured prior to attending this bootcamp. If you are unable to find help, DSWi's experts can help you configure this as a separate paid engagement.
  - In the event that you do not have access to the Edit-in-Excel tool, your instructor will complete all the bootcamp exercises using RapidStart Configuration Packages
- Identify up to 3 attendees from your company who will participate in this Data Migration Bootcamp; these are the individuals who with either be responsible for importing your data into Business Central, and/or understand the data in your existing business system

Bootcamp Agenda

DSWi recommends that the bootcamp be completed in a single session of 4 hours (with a 15 minute break in the middle), but it can be broken down into two sessions of 2 hours each upon request.

Delivery Format: Live online instructor-led session(s), using Microsoft Teams (or similar)

Language of Instruction: English (Spanish instructor available upon request)

Date / Time: Scheduled upon signing the Bootcamp Work Order and completion of payment

Course Materials and Deliverables:

1. Prepackaged data samples that will be used by the instructor and yourself as part of the hands-on exercises
2. Data Migration Best Practices Whitepaper
3. Upon completion of the bootcamp, you will receive a pre-recorded video created by DSWi going through a similar data migration exercise
   a. This video recording is for internal use by your business for reference purposes only and may not be distributed to any third parties without prior written consent from DSWi
   b. The video recording will be similar in nature - but may not be identical to - the steps and processes covered in your specific bootcamp session

Agenda:

- Introduction to Data Migration Tools in Business Central
- How to import Master Records
  o Chart of Accounts (or use/append to the pre-built Chart of Accounts in Business Central)
  o Customers
  o Vendors
  o Items
  o Dimensions (Reporting Segments)
- How to import opening General Ledger Balances
- How to import summarized General Ledger Balances by period
- How to import Item quantities and Inventory valuation
  o Use of Bins, Serial Numbers, and Lot Numbers is <u>NOT</u> covered in this bootcamp
- How to import Open Payables and Open Receivables

The bootcamp will use a combination of instruction / theory and hands-on exercises to give you an immersive learning experience.

Questions?

Do you have questions? Would you like to speak to someone at DSWi before proceeding? We'd be happy to help!

Please e-mail Kyle Collins, Director of Business Development at sales@dswius.com or call us at 888-370-4976 (Extension: 1).

Business hours: Monday to Friday, 9:00 AM to 5:00 PM Central Time (US).

Feedback?

Have you already attended our bootcamp? We'd love to hear your feedback on what you liked about it and where we can improve. Or perhaps you'd like to schedule additional training with us.

Please e-mail AJ Ansari, COO at aja@dswius.com or call at 832-699-2433.

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