Dynamics GP to Dynamics 365 Business Central Transition Offer FAQ

1. WHAT IS THE TRANSITION TIMELINE?

The transition timeline varies depending on the capability's packages selected in the table above. The timeline for the Core Finance package will start at 8 weeks and other capabilities packages will add an additional 1 – 2 weeks each.

2. HOW DOES THE DATA MIGRATION WORK?

Encore will provide formatted Excel templates that need to be filled out by the customer. The templates include master files (Chart of Accounts, Vendors, Customers, Items) and Opening Balance templates for each subledger. Encore will meet with the customer to explain the data templates and how to fill them as there are some key fields that have validators. The customer will be responsible for cleaning the data and will be shown how to load the data using configuration packages provided by Encore.

3. WILL ENCORE ASSIST WITH GATHERING DYNAMICS GP DATA?

Yes, Encore can assist. While extracting data out of Dynamics GP is out of scope of this project, we will help with this as a support case. Due to the customers different data types and volume, the customer will need to review the data and ensure they balance and reconcile before things move forward.

4. WHAT IS ENCORE'S APPROACH TO DATA CLEANSING, CONVERSION, LOAD, AND VALIDATION?

The data cleansing will be performed by the client. Encore will provide the client with data templates and will ensure the client is trained and comfortable filling the Excel templates with data.

The client needs to review, clean up, and validate their data. Some of the data clean up required is to have data consistency. For example, when Canada is spelled six different ways in the existing data, it needs to be cleaned up and spelled one consistent way. Another example is to ensure the journal entries balance.

Once the client uploads the completed templates in the secure team website, Encore will load this data into the configured Dynamics 365 Business Central environment. Encore will validate the number of records and spot check the data to ensure it's loaded properly. The spot checks are documented for the client to review and approve.

5. WHAT IS THE PROCESS FOR SECURING THE DATA TEMPLATES TRANSFERRED BETWEEN ENCORE AND THE CLIENT?

Encore will create a Microsoft Teams site and invite the client to join. Only the Encore team members working on the project can access the Teams site, along with the client's key users. The data will be uploaded and stored securely in the Teams site. Clients will only be able to log into this site with their work Active Directory account.

6. WHAT CAN YOU EXPECT DURING THIS TRANSITION?

During this transition, customers can expect an analysis of their Chart of Accounts, set-up, training, and a go-live for each of the capabilities package selected. 8 hours of go-live support is also included.

7. WHAT IS ENCORE'S IMPLEMENTATION PROCESS FOR THE TRANSITION OFFER?

Below is the high-level implementation process that Encore will follow:

1. Client signs LOE
2. Internal resources are assigned to the project
3. Project kick-off meeting
4. Client receives short questionnaire to ensure modules selected and requirement details match
5. Confirm go-live date
6. Provide project timeline
7. Client receives short 'how to' introduction videos
8. Client receives master file Excel templates
9. Client receives checklist to review the project plan and details of the next steps
10. Prepare the Dynamics 365 Business Central tenant
11. Configure the environment
12. Import Chart of Accounts
13. Continue to configure environment
14. Import master files
15. Test system (Encore)
16. Training session with client
17. Test system (Client)
18. Go-live
19. Import Opening Balances
20. Go-live support
21. Project transition to Encore Care support

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8. ARE HISTORICAL BALANCES BROUGHT INTO DYNAMICS 365 BUSINESS CENTRAL?

Yes, two years of historical balances in summary will be brought into Dynamics 365 Business Central, but no detailed historical transactions. This data is brought from GP to Business Central through the data templates that are filled out by the customer. These opening balances will have transition transactions imported.

9. CAN YOU KEEP ACCESS TO DYNAMICS GP AFTER A TRANSITION?

Yes, the Dynamics GP license is in perpetuity and clients can maintain access to their legacy system for historical purposes.

10. DURING THE TRANSITION PROCESS, IS THERE ANY ANTICIPATED DOWNTIME FOR DYNAMICS GP?

No, there will be no downtime for Dynamics GP. Once the set cutoff date is determined, besides closing month entries, there should be no more entries entered or posted in GP. User access will be set to read-only in GP and users will be able to look up transactions in GP if the server is up and running.

11. WHAT IF WE HAVE DYNAMICS GP ADD-ONS/ISV SOLUTIONS?

If you have ISV Solutions in Dynamics GP, we will need to analyze those separately. There are applications that are ERP agnostic, so they work with both Dynamics GP and Dynamics 365 Business Central. In some cases, the add-on solution may no longer be needed anymore! There might have been a gap in Dynamics GP, but there is not that same gap in Business Central. If there is a gap that needs to be filled in Business Central, there may be an App available through AppSource.

For more information please see What Happens to My Dynamics GP Add-On Solutions When I Move to Dynamics 365 Business Central?

12. HOW MUCH INVOLVEMENT IS REQUIRED BY YOUR ACCOUNTING TEAM?

The customers accounting team will need to prepare the master file and opening balance templates, attend the kick-off meeting, attend the training sessions, and test, verify, and sign-off on the system.

13. WHAT IS THE ANTICIPATED DOWNTIME BETWEEN STOPPING ENTRIES IN GP AND STARTING UP IN BUSINESS CENTRAL?

Typically, 1 or 2 days after the data is extracted from GP. Clients will be provided with opening balance templates and will extract the data from GP using SmartLists. Once the data is

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extracted and sent to the Encore team, it will be 1 or 2 days. Once confirmed that the data is clean, in balance, and accurate, the Encore team will import the data.

14. FOR AUDIT ADJUSTMENTS, HOW WILL ADJUSTED JOURNAL ENTRIES BE RECORDED IN DYNAMICS 365 BUSINESS CENTRAL?

For audit adjustments, customers will enter them into Dynamics 365 Business Central and post afterwards. This will adjust the imported balances to the adjusted balances.

15. HOW MUCH DO DYNAMICS 365 BUSINESS CENTRAL LICENSES COST?

Per User Per Month	List Price	Promotional Price
Business Central Essential Full User	$70.00 USD $89.60 CAD	$42.00 USD $53.80 CAD
Business Central Team Member	$8.80 USD $10.20 CAD	$4.80 USD $6.10 CAD

For clients who are current on their annual maintenance, they're eligible to receive a 40% discount on Dynamics 365 Business Central licenses. This discount is reflected in the promotional pricing listed above. With the promotional pricing, please note that the Dynamics 365 Business Central licenses need to have an annual total greater than or equal to their Enhancement Plan renewal amount.

Pricing is on a per user per month basis. All capabilities listed in this transition package fall under the Business Central Essential Full User license. Team Member licenses can be added as well. For more information, please see Dynamics 365 Business Central | Licensing and Pricing Answers.

16. IS CLOUD HOSTING PAID FOR SEPARATELY FROM DYNAMICS 365 BUSINESS CENTRAL LICENSES?

No, with Dynamics 365 Business Central SaaS licensing everything is included in one fee. The software, cloud hosting, and management services are combined into one price, they are not separate components. To deploy on Azure, there is no additional Azure fee.

17. WHAT ARE THE LICENSE REQUIREMENTS FOR WORKFLOW APPROVAL?

Users with a Business Central Team member license can approve a workflow, as well as Business Central Full user licenses.

To enter transactions, a Business Central Full user license is required, except for sales quotes where a Team member license will be sufficient.

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18. CAN WE ADD EXTRA DYNAMICS 365 BUSINESS CENTRAL CAPABILITIES THAT AREN'T LISTED IN THE PRICE CALCULATOR?

For this transition offer, we're only implementing the capabilities listed in the Price Calculator (with the exception of Payroll). However, after your transition is complete, other Dynamics 365 Business Central capabilities can be added. These additional capabilities would be a separate project and would occur on a different timeline.

19. WHAT IS ENCORE'S CHANGE ORDER PROCESS?

This depends on if the additional requirements are part of the Essentials program or not.

For an additional module that's part of the Essentials program, Encore will issue a change request to be signed and approved by the client and Encore's team.

For additional requirements out of scope of the Essentials program, Encore will evaluate and analyze the request, then prepare a quote for the additional work and timeline. Typically, for requirements not in the Essentials program, they will be addressed in a phase two of the project, which is after go-live and the 30-day stabilization period.

20. CAN WE ADD PAYROLL FUNCTIONALITY TO THIS PROJECT?

Yes, Payroll functionality can be added to the scope of this project. Currently Dynamics 365 Business Central doesn't have built in Payroll functionality, therefore it would be an add-on product that would take care of the payroll functionality. Encore can help make recommendations for which payroll add-on products we have experience working with.

21. HOW IS THIS OFFER DIFFERENT FROM A REGULAR DYNAMICS 365 BUSINESS CENTRAL IMPLEMENTATION DONE BY ENCORE?

This offer is different from a regular Dynamics 365 Business Central implementation in the timeline and the scope of what is offered. The intent of this offer is for the transition process to occur in a shorter timeframe with a standardized setup and configuration. This offer also has less Dynamics 365 Business Central capabilities offered. The capabilities were selected for our Dynamics GP clients in mind.

22. WHAT IS THE PROCESS FOR MOVING FROM IMPLEMENTATION TO ONGOING SUPPORT?

Once the User Acceptance Testing is completed and the client signs off to proceed with the go-live date, there is a 30-day stabilization period with the Encore team. This stabilization period is when the Encore team working on the project is available to the client to answer any questions or issues that come up in the 30 days. Once the 30 days are complete, the client will transition to submitting support tickets through the Encore Care support team, which the client will be shown how to do. The Encore team will notify the Encore Care support team near the end of the 30-day stabilization period to set the client up with support.

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23. DOES ENCORE OFFER SUPPORT FOR DYNAMICS 365 BUSINESS CENTRAL?

Yes, Encore offers support for Dynamics 365 Business Central. Encore Care Unlimited Support is a monthly subscription-based program that provides support and guidance to our clients experiencing everyday errors or questions about their Dynamics 365 Business Central environment.

Through Unlimited support, you will be able to log tickets for:

- Break/Fix questions
- General user assistance and application guidance
- New User Orientation Training
- New User set up and application install on new workstations

Encore Care Support Licenses	Price Per User Per Month
Unlimited – Full User	$55 USD/CAD
Unlimited – Team Member	$15 USD/CAD

We strongly suggest that customers sign up for Encore Care support for the first 12 months after the transition go-live date.

24. ARE POWER BI REPORTS AVAILABLE IN THIS OFFER?

Yes, Power BI reports are available and included in this offer. The Microsoft Power BI App for Business Central provides a powerful set of reports and dashboards that will be implemented for you. Once installed, you can create new visualizations, customize the branding, link to additional data sources and much more. You will no longer be dealing with historical static reports. Through Power BI, you will have interactive and predictive reporting at your disposal.
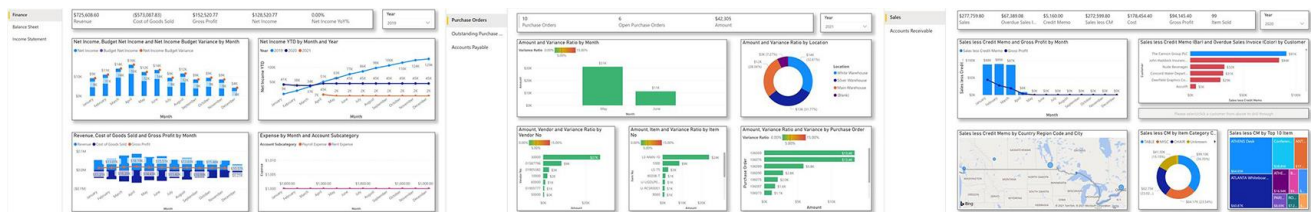
The Power BI App subscription ($75 per month per tenant) gives you access to all the latest content pack features as they are released. Setup and upgrade of the content pack are included as part of your subscription price. You can also help to contribute ideas to improve the content pack by sharing your feedback with our development team through your Account Executive.

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Power BI Licensing	Price
Power BI App	$75 USD/CAD per 1 tenant
Power BI Pro License	$10 USD/$12.80 CAD per user per month

Power BI licensing is on a per user per month basis and is not included in the price of the app. To access the app, users require a Power BI Pro license. If your business currently has Microsoft E5 licenses, Power BI is included in that so there is no additional licensing required.

25. WHAT RESOURCES ARE AVAILABLE TO START LEARNING HOW TO USE DYNAMICS 365 BUSINESS CENTRAL?

- Dynamics 365 Business Central New User Training Video
    - Topics discussed during this video include: How to log-in, Overview of Role Center, How to switch between companies, Using the search functionality, Overview of Dimensions, Overview of Master Records, Attaching documents, Adding a note, Overview of Transactions, Overview of List Pages, Overview of Filtering, Overview of Exporting and Editing in Excel, Common Filter functions, Personalization, Creating shortcuts, Pop-out window feature, Overview of Configuration Package, and Submitting Feature Recommendations.
- Dynamics 365 Business Central Training YouTube Playlist
    - This playlist has short videos to show you how to use common features and functions in Dynamics 365 Business Central.
- Microsoft Learn for Dynamics 365 Business Central
    - There are numerous training paths you can complete to start learning or learn more about Business Central. Microsoft Learn is a free online learning platform.
- Microsoft Documentation for Dynamics 365 Business Central
    - This documentation gives you in-depth articles about Business Central.

26. IS THERE A FREE TRIAL OF DYNAMICS 365 BUSINESS CENTRAL?

Yes, there is a 30-day free trial of Dynamics 365 Business Central. Sign up for a free trial here.

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