



## QUICKBOOKS DESKTOP IMPLEMENTATION ON AZURE:

### NEEDS ASSESSMENT AND DEPLOYMENT PLAN



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### qb-azure-deployment planning: 5hr assessment

#### consulting and recommendations

Assessment and review of requirements for QuickBooks delivery on Azure platform, and development of deployment plan and options for deployment configurations to meet customer and business need.

Initial meeting is where we perform information collection and discovery with discussion of customer requirements, covering topics such as

- Number of tenant organizations
- Number of QB company files
- Customer provides matrix of users to QB company files
- QB Variants: QuickBooks version(s), year(s) and edition(s) to implement

Areas covered by the assessment include

- limitations and considerations
- licensing requirements
- technical requirements



Noobeh's experienced consultants will learn what your business needs in a QuickBooks deployment on Azure and will develop the deployment plan to make it happen.

After an initial consultation and information gathering session, Mendelson will develop the plan and options, outlining what needs to happen to make the delivery successful.

Mendelson then presents the proposed deployment plan and delivery options addressing customer requirements and business need.

A follow up call with the provides the opportunity for clarification of plan information and to get additional customer questions answered.



Intuit QuickBooks desktop software is one of most popular small business accounting products on the market. As businesses seek to develop agility and scale for the IT platforms supporting this and other desktop applications, Mendelson Consulting delivers the experience and expertise required to ensure a quality cloud-based implementation.



Mendelson Consulting is a recognized leader in the Intuit Reseller Partner community and is a premier QuickBooks Solution Provider as well as a silver Microsoft Cloud Solution Provider specializing in Small Business Cloud Solutions.

Upon completion of this engagement, the customer will have a plan for deployment of QuickBooks desktop software in their Azure cloud server environment.

## The foundation of a QuickBooks desktop installation is the Azure cloud infrastructure it will be deployed into.



As part of the engagement, Mendelson Consulting will provide guidance relating to customer's VM configuration as well as the licensing and applicable deployment models for the customer's QuickBooks desktop product to ensure proper application of the QuickBooks software for this virtualized environment and business need.

Mendelson will have the customer describe the companies, users and company file access requirements to ensure compatibility and compliance with QuickBooks licensing and single-tenant access models.

Based on discussion with the customer and information provided, Mendelson Consulting will develop a deployment plan for the customer, oriented toward guiding the implementation of the QuickBooks desktop and associated software products into the customer's Azure infrastructure.

### Step 1: Engagement and Order Services

The initial engagement between Mendelson Consulting and the Customer is initiated when Mendelson produces the order and invoice for services to the Customer and the Customer remits payment for the engagement. Once the payment is received by Mendelson, the engagement will commence to the next step, which is the initial Consultant Call. The engagement is estimated at 5 hours at a cost of \$1000 USD.

### Step 2: Consultant Call

Upon engagement with the customer, a Mendelson consultant will arrange for an initial call with the customer to validate the requirements of the business and the implementation. During this step, the consultant will gain an understanding of the customer's need and gather information to further detail the requirement and to identify license, software, infrastructure and other resources available. Information collected by the consultant will include but will not be limited to:

- Matrix of QuickBooks software variants and users required to access each
- Additional applications and QB integrations to be deployed and matrix of users for each
- MS Office application requirements
- Redundancy and fault tolerance requirements
- Current security posture
- Current sizing and expectations for near term growth



Customer participation is required for the initial discussion, which is a telephonic conversation and not in-person. Additionally, the customer will provide the following to Mendelson personnel to support the performance of the planning work by Mendelson:

1. QuickBooks year and edition information, which identifies which QuickBooks software is to be implemented in the customer environment;
2. QuickBooks license, product key and activation. If activation code is not available, customer should be able to provide information required to activate the software installation on-line with Intuit. The licensing to be installed on the server must be congruent with the desired outcome of the implementation;
3. For third-party applications which integrate with QuickBooks, specific edition information and technical support representative contact information;
4. Existing MS Office licensing information, incl Office365
5. Number of organizations, company files and users
6. Matrix of QB editions, company files and users to be supported by the deployment
7. User locations to be supported by the deployment

### Step 3: Mendelson Develops and Presents Deployment Plan and Options

Mendelson's personnel will then develop and propose a deployment plan for the customer, based on the information presented and learned from the discussion and collection phase 2. The plan addressing the customer requirement and business need will incorporate information relating to:

1. QuickBooks and system access licensing requirements
2. Deployment of QuickBooks on Azure
3. Scaling the delivery
4. Creating redundancy and fault tolerance
5. Addressing access and security

### Step 4: Followup Consult with Customer

Upon Mendelson concluding the development and delivery of the deployment plan to the customer, a follow-up telephonic discussion with the consultant and customer is held to provide any clarifications and to answer customer questions relating to the proposed deployment plan.

The total time requirement for this activity is expected to be approximately 5 hours, including the initial discussion and follow up consult, each of which are estimated at 1 hour.

