

Rapid Start Implementation

Business Central



Rapid Start Delivery Approach

Rapid Start Base

Rapid Start Base is restricted to the following modules in Business Central

- General Ledger
- Bank
- Accounts Receivable – full Sales Invoice, GL only, no items
- Accounts Payable – basic Purchase Order and invoice match functions, GL only, no items.

Included with the Rapid Start Base package is:

- Project Initiation and Setup.
- Provisioning of environment, including Live and Test databases.
- Setup of Users with Template User Profiles and Roles

- Core configuration of all included modules as above.
- Review of chart of accounts, customers and suppliers after extraction from current system.
- Upload of chart of accounts, customers and suppliers (including bank accounts) into Business Central based on template setup.
- Set up Dimensions and Dimension values.
- Template stationary for Sales Invoice, Sales Credit, Customer Statement, Purchase Order and Remittance Advice.
- Bank flow for Direct Credit payments.
- Configured GST Report.
- Super user training for updating configuration.
- Project Management

Notes to the package:

- Any changes to stationary layouts outside of logo, addresses and bank details will be quoted at T&M rates.
- Chart of Accounts, Customers and Suppliers will be loaded at a basic level with little or no categorization, and a single posting group. Updates to Customers and Suppliers will be completed by the Super User after training.
- Clients will be provided with links to Microsoft training materials and help information. Checklists and videos provided by Olympic 33 will be available in some areas. Use of these materials will minimise the consultant led training required to get up and running.

Optional Additional Support Package

Additional support allowance can be added to the base package to assist with Data Migration and additional deliver support.

Data Migration Allowance

The Data Migration Allowance includes:

- Review and mapping of summary monthly GL balances to the new account structure (2 years).
- Upload GL balances to Business Central.
- Upload any opening bank transactions into the Bank Reconciliation.
- Upload opening Customer and Supplier documents.

Support Allowance

The Support Allowance has no specific split out of time, rather it is expected that use of the time is client initiated. The Business Requirements process will further define the use of this time and may include any or all of the following:

- Consultant led training
- Customised security
- User Acceptance Testing support
- Go Live Support
- Implementation of features not included in the Rapid Start Base
- Additional stationary layouts or modifications to templates
- General support for client implementation team

Implementation Methodology

Olympic 33's delivery approach sets up each implementation to suit the needs of the client. There is no "one size fits all" approach, however where suited, pre-defined templates and processes will be utilised.

Business Central's tight integration with the Microsoft suite does mean that there are a number of areas that can be implemented by clients directly rather than the traditional method of having to have a trained consultant complete all the work.

In traditional implementations, costs on estimates can blow out quite quickly by trying to isolate how much time will be spent on tasks such as User Acceptance Testing, Training and Go Live Support. Olympic will provide a guideline recommendation of the allowance of hours you may need. These are all time and materials and can be minimised by users taking advantage of online standard training materials.

Business Requirements Study

The Business Requirements Study is used for larger organisations with significant integration and/or development requirements. The Business Requirements is made up of a series of workshops to drill further into the detail of the Business Requirements explored during the pre-sales process.

The output from this stage is the Business Requirements Document or Statement of Work. This completes in more detail the following:

- Scope of the project
- Any agreed phasing
- Initial risk analysis
- Details of specific customisation or integration
- Deliverables checklist
- Project timeline
- Project budget

Rapid Start Base

The Rapid Start Base allows for a templated deployment of Business Central for key setups. It includes time allowances for uploading and configuring master data, contains base stationery templates, installs the standard Olympic 33 bank export formats (not linked to the bank directly) and a package Olympic 33 developed tools built up from common client requests.

Rapid Start is about getting you up and running quickly with a base system.

The Rapid Start Base includes General Ledger, Bank, Accounts Receivable and Accounts Payable functions.

Data Migration

Some form of data migration will be needed in any implementation. However, this is where the control is firmly in your hands. The majority of data migration can be completed using Excel templates and uploading. You will need a user in house who has reasonable Excel skills and understanding of the data being migrated.

Alternatively, you have the option of getting us to do the migration for you. Estimates will be provided in your proposal based on Olympic 33 completing the work.

Training

Olympic 33's training approach is very much an "as needed" process. You will be trained on processes in short sessions, as needed, to complete UAT and live processing.

Years of experience has shown that running half or full day training sessions on an entire module has little benefit to end users. It often contains information that is either not needed at all or not needed for an extended period, meaning users forget what they have learned.

A training checklist is utilised and reviewed after Go Live to identify any gaps in the knowledge transfer and create a plan for training enhancement as needed.

Links to Microsoft's online training materials will be provided for sites to self-learn if they wish.

Consultant training may be provided in online meetings, by recording a video of a specific process or onsite as suits.

Integration / Development / Add-ins

Once the Rapid Start Base is implemented, any custom work can begin. This is all done in a UAT company or Sandbox environment as appropriate. Parallel testing of batches of data is completed during testing to ensure the right outcomes.

Reporting

The reporting options with Business Central are wide and varied. In a Rapid Start phase, Olympic would utilise the Account Schedules inside Business Central for financial reporting. If more than that is required, there are options to use Excel, Power BI, or other 3rd party BI tools.

Benefits Realisation

This phase of the project comes after Go Live and is where as an organisation you really look at how to get the best value out of your investment in Business Central. While Rapid Start and initial implementation looks at replacing like for like and immediate enhancement requirements, this phase looks at where you can take your business processes.

Here are some areas that may be of interest to your business:

- **Extending CRM** - for Marketing Automation
- **Fixed Assets** – migrate to Business Central
- **Integrated Transport Management System** - look at options for improving this area of your business.
- **B2B / B2C Portal** - extend functionality and move to a system to ensure future growth.
- **Additional Reporting** – operational style reporting, making best use of any dimensional structure in place.
- **Workflow approvals** – exploring what approvals can be used inside Business Central and extending where needed with the Power suite.
- **Extend Business Process Automation** – everything from using Power Query to simplify journal uploads to creating Power Apps to solve a business problem. Either integrated to Business Central or stand alone as needed.
- **Integrating additional systems** – ensure any business systems used are all talking to each other.

Preparing for an Implementation

An implementation of any system can be a lot of work for the team involved. Preparation ahead of time can ease the processes during implementation.

Here are some things you can do to prepare:

- Ensure Business Processes are well understood by the team involved and can be articulated to your consulting partner. This might include:
 - Reporting Structure
 - Security needs
 - Custom processes in your current system
 - Any niggly processes that currently take loads of time
 - Any repetitive processes
 - Exceptions to rules – “we process this way, except in this scenario”
 - Understand categorisations of data that are required
- Tidy up data in your existing system. This might include:
 - Customer & Supplier master files
 - Inactivate redundant records
 - Make sure all address fields are recorded in correct fields e.g. City is in the City field, not combined elsewhere
 - Chart of Accounts
 - Inactivate redundant records

- Understand any shortfalls in your existing structure
- Balance Sheet
 - Ensure sub-ledger balances agree to the relevant General Ledger control accounts. If they don't, fix it now – not during migration.
- Customers & Suppliers
 - Clean up old transactions – write them off if needed
 - Look for small balances i.e. 1c rounding and clear them out
 - Check for unapplied credits and apply everything that can be applied
- Bank Accounts
 - Ensure no old transactions that need to be cleared (i.e. unrepresented items)
- Pre-train in key areas by using online training materials.

Resourcing

Any major change to your FMIS is going to impact your internal resource. Your team have their day to day job to do as well as implement a new system. For a period of time, there will definitely be additional work. The following is a guideline of the types of tasks your team will need to do. It is hard to give an accurate estimate of the time they will need as each site is different.

The level of resourcing you will need will depend on how much of the implementation you would like to try and bring in house.

- Before the Implementation Begins
 - Work through the Preparing for an Implementation list and document / tidy up as needed.
- During the Implementation
 - Participate in Business Requirements sessions.
 - Prepare and review master file data extracts before upload to Business Central.
 - Validate data uploads in Business Central.
 - Complete data migration tasks (if in house data migration) or review and validate data migration (if completed by Olympic 33).
 - Complete all training sessions either independently (online materials) or with a consultant.
 - Use training to complete user acceptance testing on all functions.
 - Test all business processes in Business Central.
 - Write / review all financial reports.
 - Update internal standard operating procedures to reflect new system.
- After Go Live
 - Continue training through a full month's cycle and for any areas not covered pre-live.
 - Continue to update internal standard operating procedures.
 - Participate in Post Implementation Review workshop.
 - Identify processes that can be improved that were not in the initial scope.

Why choose Olympic 33 as your technology partner?

Big enough, but not too big

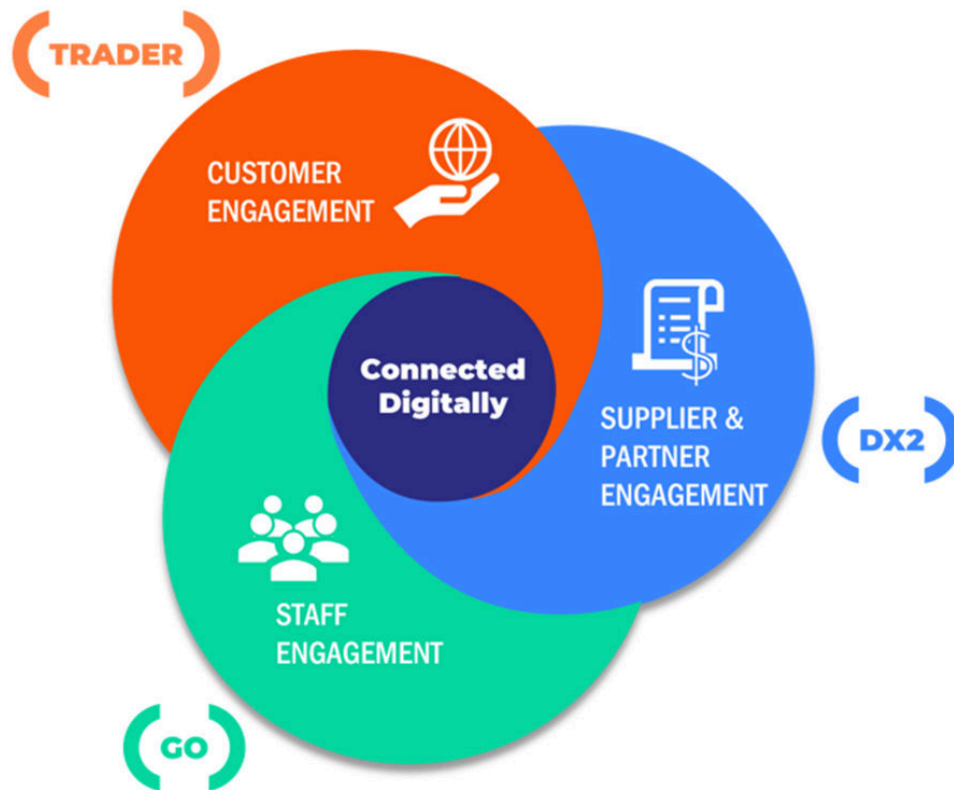
Olympic 33 is a privately owned company who has worked with small, medium and enterprise level and government organisations in New Zealand and Australia for almost 30 years. Our longevity is built off a strong commitment to our clients. Our clients are not just another number to us, we work actively to build long term relationships that deliver continuous improvements and value.

By choosing Olympic 33 as your technology partner, you can feel assured you're choosing a partner who understands business, has technical depth in the technologies best placed to support your business, and who enjoys working collaboratively with its clients.

Olympic 33's proven capability in the areas of integration, staff engagement, eCommerce and ERP system delivery ensures we have the breadth of skills and experience to assist you to realise the benefits of business digitalisation.

Investment in IP

We're continually investing in our product IP to ensure we have repeatable solutions that underpin process improvement, client engagement and business growth.

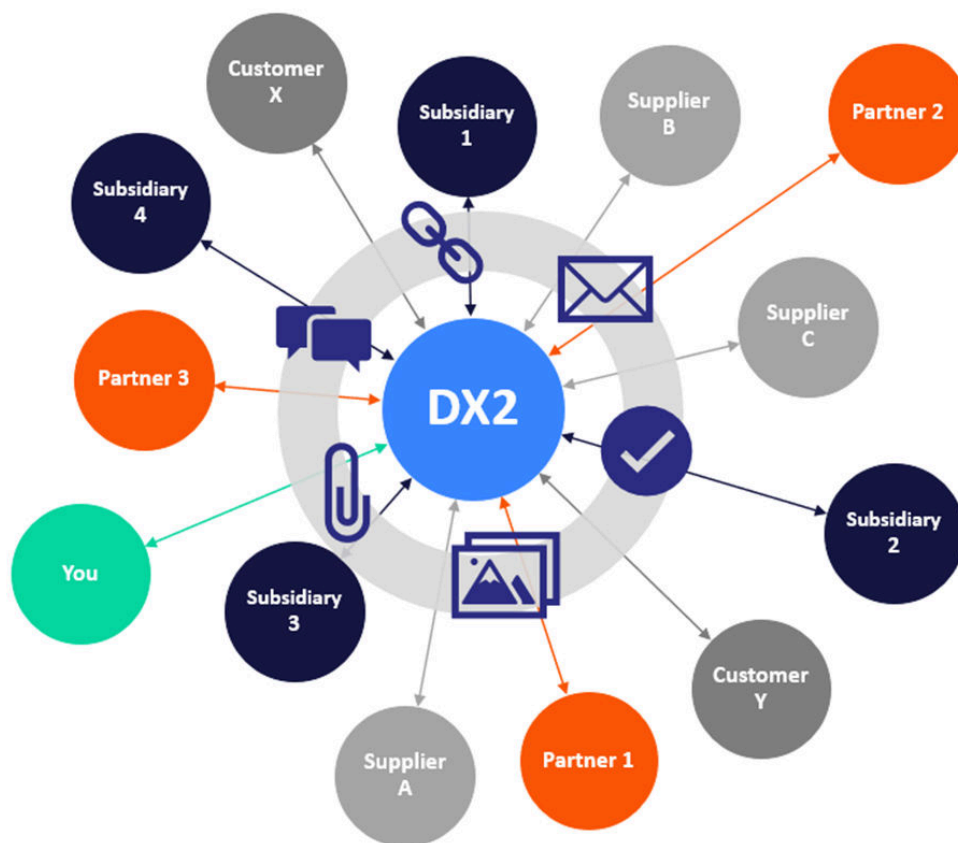


Our product roadmaps are driven by client feedback as well as emerging technologies. Olympic 33 has a long association with Microsoft, our products are on Microsoft Azure leveraging its security, performance, and resource components. Data and user security, performance and scale are never an issue as your business grows.

We own the IP, so our product pricing is competitive, delivering significant added value whilst achieving a low total cost of ownership.

Integrations in our DNA

Connecting systems internally and externally has been a key to our delivery offering since our inception. Many lessons have been learned over the years building an increasing level of IP. DX2 embodies all this learning into a single platform that supports a hub n spoke model that reduces integration costs significantly.



Our end goal is to enable Cafe Lighting and Living through a modern technology platform to become more digital and connected and therefore more efficient in your processing and systems. Our experience and alignment with Microsoft solutions will deliver a modern technology platform to underpin future growth strategies.

Why choose Olympic 33 for your Business Central project?

Our team of consultants has extensive experience in ERP across a multitude of industries. We enter each engagement with a clean slate. We leverage our developed templates and tools to configure efficiently, while also ensuring we keep your business needs at the forefront.

Your implementation team has the following combination of skills:

- Experience in solutions that support the business process, reporting and digital transformation needs of your business.
- Microsoft Certified Dynamics 365 Business Central Functional Consultant Associates consultants.
- Microsoft Certified Power Platform consultants.
- Experienced project managers to ensure delivery stays on target for both budget and timeframe.

Olympic 33's proven capability in the areas of integration, staff engagement and eCommerce ensures we have the breadth of skills and experience to assist you to extend your capability beyond the constraints of the ERP at a time to suit you.

In a market where you have many choices, we appreciate you choosing us.

Appendix

Business Central License Capability

Business Central Essentials

Financial Management			
Account Schedules	Allocations	Bank Reconciliation	General Ledger
Budgets	Cash Flow Forecast	Consolidation	Cost Accounting
Deferrals	Fixed Assets	GST Reporting	Intercompany
Multi-currency	Responsibility Centres	Unlimited Dimensions	
Customer Relationship Management			
Business Inbox for Outlook	Campaign Management	Campaign Pricing	Contact Classification
Contact Management	Dynamics 365 Sales Integration	Email Logging	Interaction / Document Management
Opportunity Management	Relationship Management	Task Management	
Human Resources Management			
Basic Human Resources			
Project Management			
Basic Resources	Capacity Management	Job Quotes	Multiple Costs
Project Management Jobs	Time Sheet		
Supply Chain Management			
Alternative Order Addresses	Alternative Ship-To Addresses	Alternative Vendors	Assembly Management
Basic Inventory	Basic Payables	Basic Receivables	Calendars
Cycle Counting	Drop Shipments	Item Attributes	Item Budgets
Item Categories	Item Charges	Item Cross References	Item Substitutions
Item Tracking	Location Transfers	Multiple Locations	Order Promising
Purchase Invoicing	Purchase Line Discounting	Purchase Line Pricing	Purchase Order Management
Purchase Return Order Management	Requisition Management	Demand Forecasting	Sales Invoice Discounts
Sales Invoicing	Sales Line Discounting	Sales Line Pricing	Sales Order Management
Sales Return Order Management	Shipping Agents	Standard Cost Worksheet	Stock Keeping Units
Vendor Catalogue Items			
Warehouse Management and Inventory			
Automated Data Capture System	Bin Setup	Internal Picks and Put Aways	Pick
Warehouse Shipment	Warehouse Management Systems	Warehouse Receipt	
Other Capabilities			
Analysis Reports	Change Log	Embedded Power BI	Extended Text
Job Queues	Reason Codes	Retention Policies	Unlimited Companies
User Management	User Tasks	Workflow	Word Reporting / Document Reporting

Business Central Team member License

This license grants a named user the following rights for their own use only (not for, or on behalf of, others):

- Read data within Business Central
- Update existing data and entries in Business Central, such as previously created customer, vendor, or item records. Entries are defined as specific accounting information that, may be updated, such as a due date on customer ledger entries.
- Approve or reject tasks in all workflows assigned to that user, with the limit that approvals and rejections can only update data in records that Business Central Team Members can access.

- Create, edit, and delete a sales or purchase quote.
- Create, edit, and delete personal information
- Edit job time sheets for approval
- Use the Dynamics 365 Power Apps/Power Automate use rights provided with a Dynamics 365 license
- Business Central Team Members application module may be customized with maximum 15 additional tables (custom tables or standard Dataverse tables) available to the Business Central Team Members license per pre-approved application scenarios. This application module is defined as the Business Central application capabilities available to Business Central Team Members users as described above.

More Questions? Contact Me

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