



AX/ Dynamics 365 Finance&Supply Chain Management BestPath Assessment

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Agenda

1. BestPath Assessment
2. Transition to D365
3. Summary and Next Steps



**BestPath Assessment for
AX/Dynamics 365
Finance&Supply Chain
Management**



— Are you in the situation?

What discourages you

Every upgrade requires sales and production resources

- Quotes preparation takes time.
- Developers tied up with upgrades instead of new opportunities.

What should encourage you

Risk of losing your customers

- Many customers are on unsupported versions.
- Open for competitors.
- The customer want to know what are the options and costs to upgrade.

Risk of losing revenue

- You could get much more revenue from your existing customers.

What if you could?

- Easily define the price of an upgrade project
- Expand your capacity
- Develop trusted methodology for upgrade projects
- Easily convince the customer to upgrade
- Increase profitability of upgrade projects



1ClickFactory BestPath Assessment for AX

What?



1ClickFactory's BestPath Assessment is a technical solution assessment and analysis to make more informed decisions as to which upgrade tactic is the most beneficial for the customer to move to the new Dynamics AX version.

How?



The BestPath Assessment consists of the initial project assessment, fixed price workshop with a Partner, re-assessment of the solution, recommendations for the most beneficial path and project plan preparation.

Why?

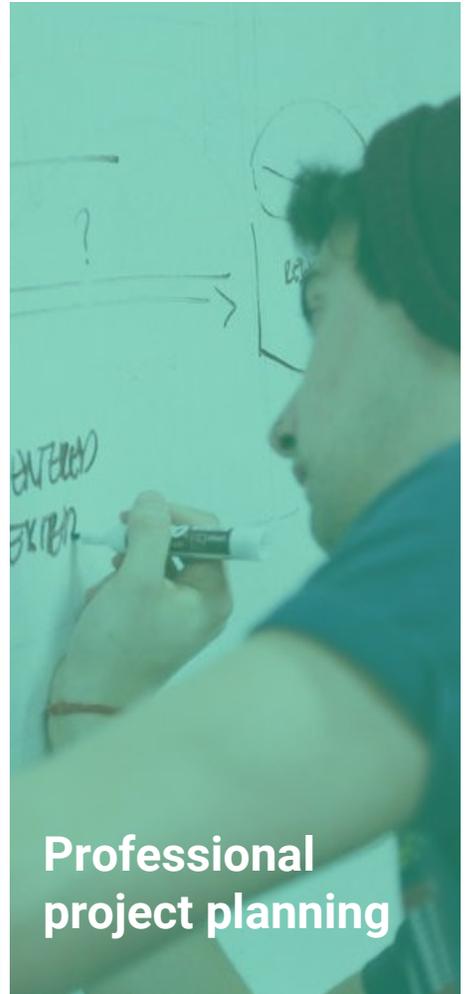
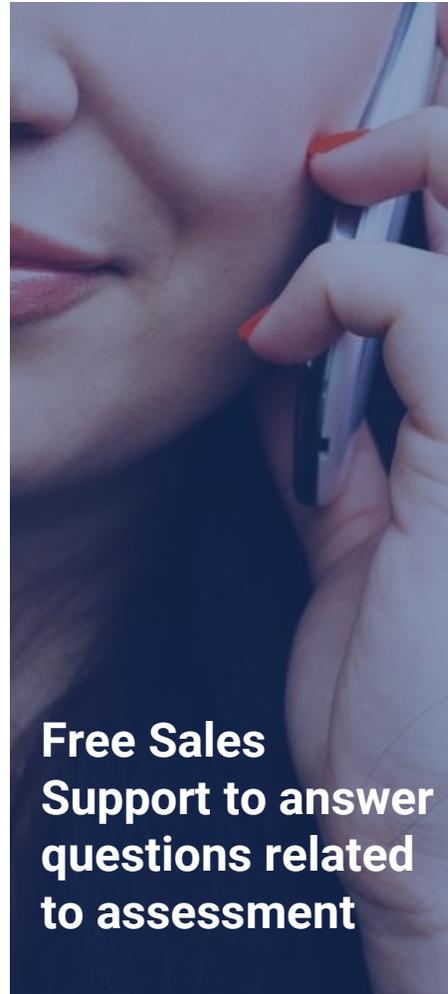
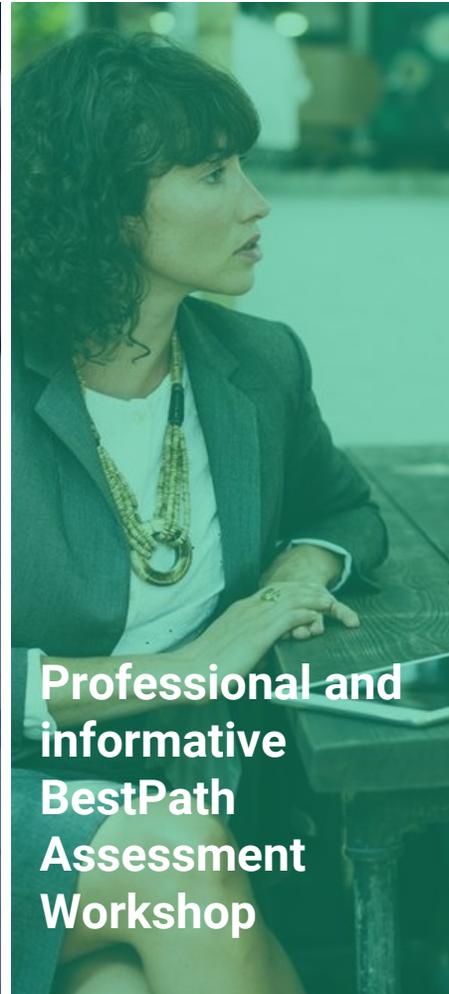


The BestPath Assessment gives a clear plan for the project execution and more visibility into your customer solution complexity to better manage the project's risks and avoid costly mistakes.

1ClickFactory BestPath Assessment for AX Process



Benefits of 1ClickFactory BestPath Assessment for AX



— Partner Evidence

“

We highly recommend 1ClickFactory to other Dynamic Partners. When speaking with customers who are considering upgrades, we always consider your services. For us, it's not possible to conduct successful upgrades without your specialization and experience with AX upgrades. We would not feel confident performing upgrades for our customers without 1ClickFactory's support.

”

Carlos de Lira, Product Sales Manager, XPTA

Prerequisites for the Best Path Assessment

- Source and Target solution version (build numbers);
- Database size;
- No. of companies to migrate;
- Info about add-ons;
- Modelstore or Application Files of the solution.

— Deliverables

- BestPath Assessment Report
- Upgrade Scope Document
- Project Plan
- Fixed Price Upgrade Proposal (Optional)



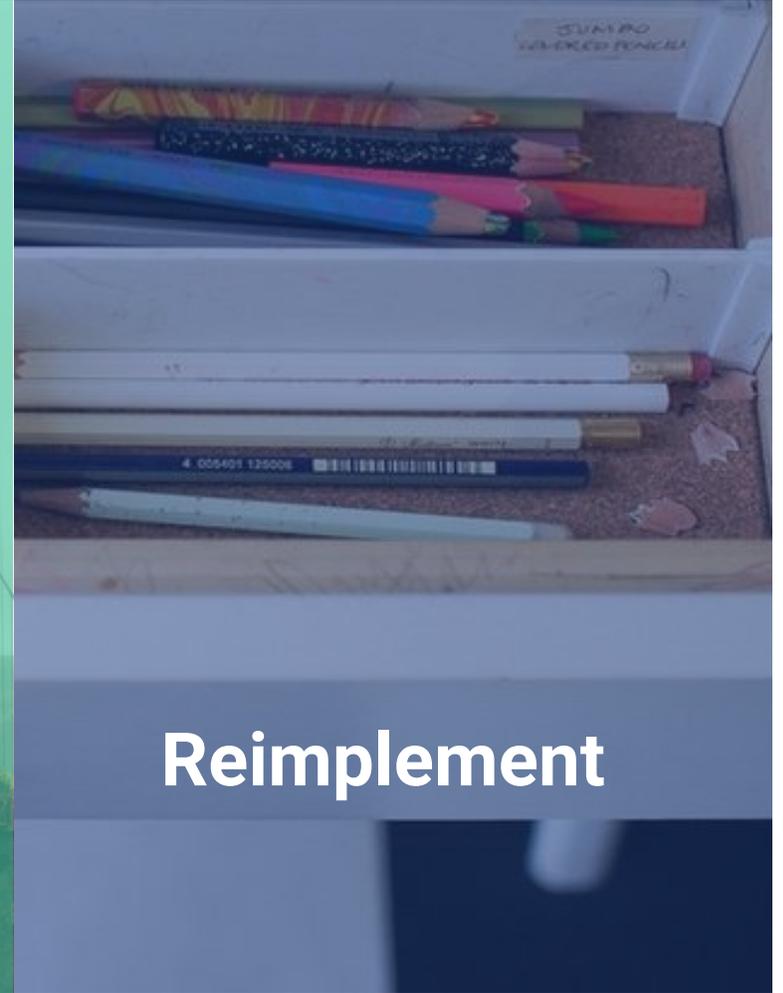
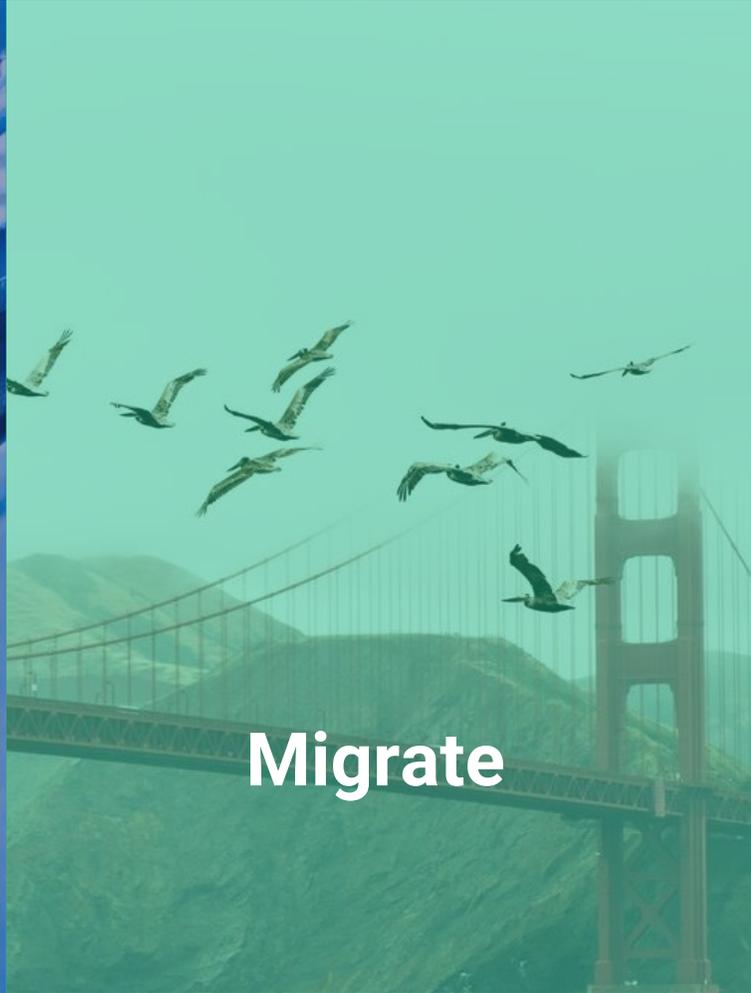
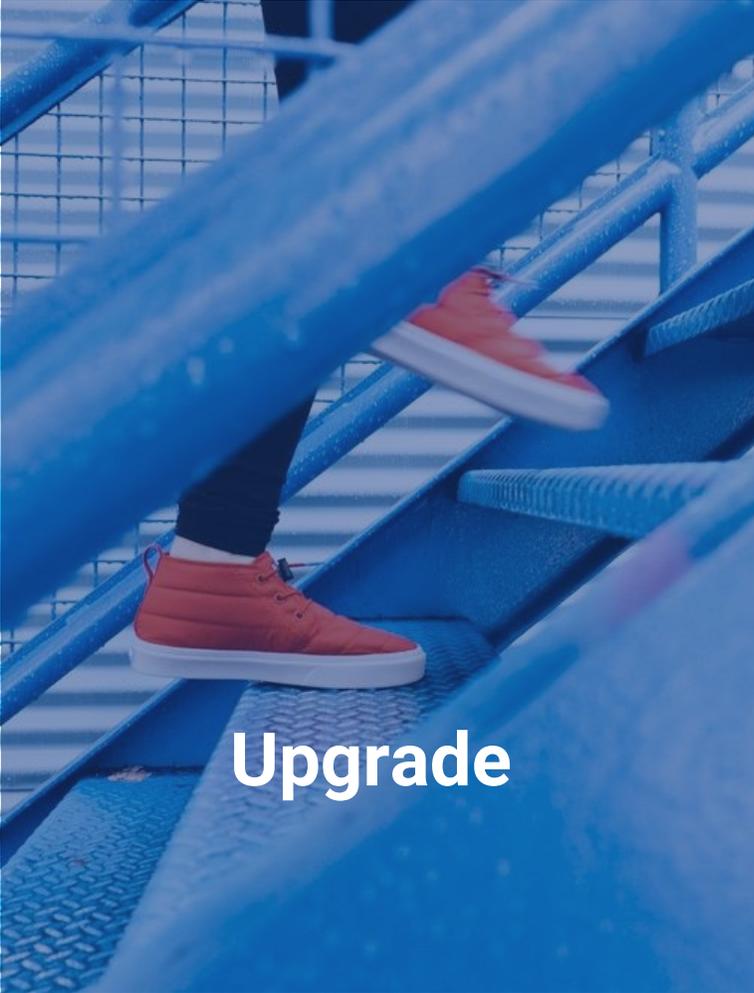
Understanding your path



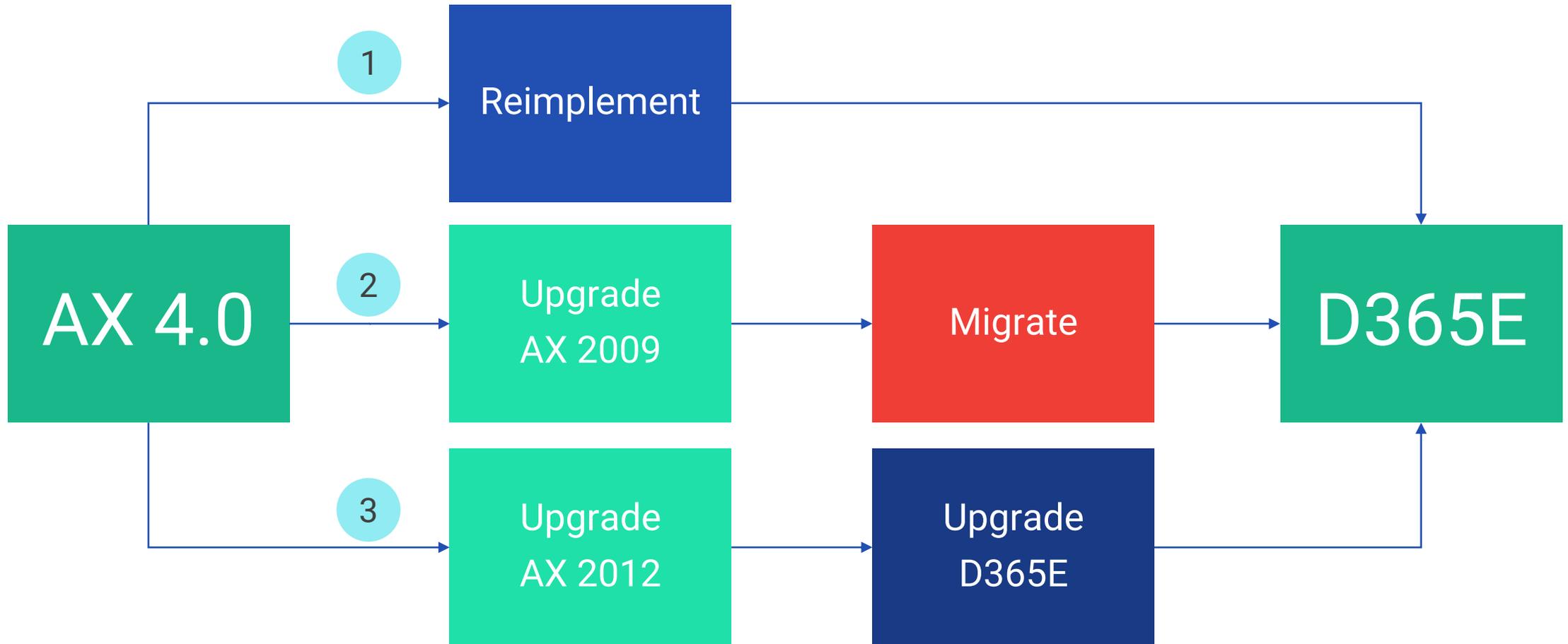
Factors When Selecting the Best Path

Business reorganization or restructure	<ul style="list-style-type: none">• Change in organization structure• Business process change or reengineering. Implementing workflows
Database size & quality	<ul style="list-style-type: none">• Data quality, consistency, integrity, etc.• Substantial volumes of historical data (purge or archive)
Customizations & new functionality	<ul style="list-style-type: none">• Need to use new functionality that is available in a new version• Higher integrity, security, and reliability requirements• Change in organization structure• Business process change or reengineering• Implementing new business process workflows• Customizations implemented in new standard version• Eliminating obsolete customizations• Risk of moving old customizations to a new version
ISV solutions & integrations with third party applications	<ul style="list-style-type: none">• New functionality replaces existing third party applications• Business critical integrations• Supporting target version
Other	<ul style="list-style-type: none">• Appropriate budget• Timeline expectations• Downtime limitation for a cutover• Internal and external resource availability

Understanding your path Areas of 1ClickFactory's Support



Understanding your path



Transitions

Transition to D365E Path 1 (Reimplement)

- AX 4.0 is a very old system
- Carrying modifications forward old data may be undesirable and difficult
- Modifications might be covered by standard functionality of new version

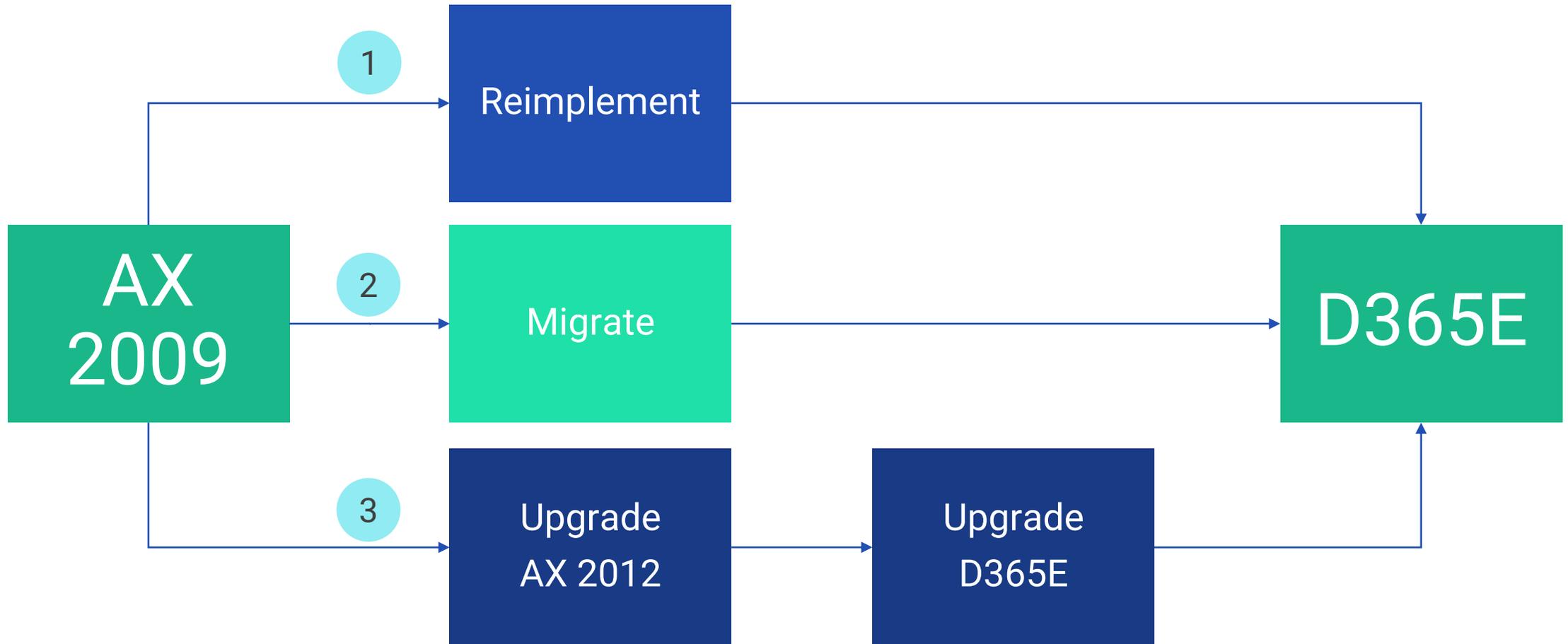
Transition to D365E Path 2 (Upgrade then Migrate)

- The effort needed to go to AX 2009 (vs. AX 2012) is lower
- Ability to use existing AX 2009 data migration tools
- Customer's solution has low/medium complexity level
- Easier move data by upgrading database structure only
- Potentially require additional testing

Transition to D365E Path 3 (Upgrade)

- If customer's solution is lightly customized
- Data migration is more painful than code upgrade
- Potentially requires double testing
- Higher risk

Understanding your path



Transitions

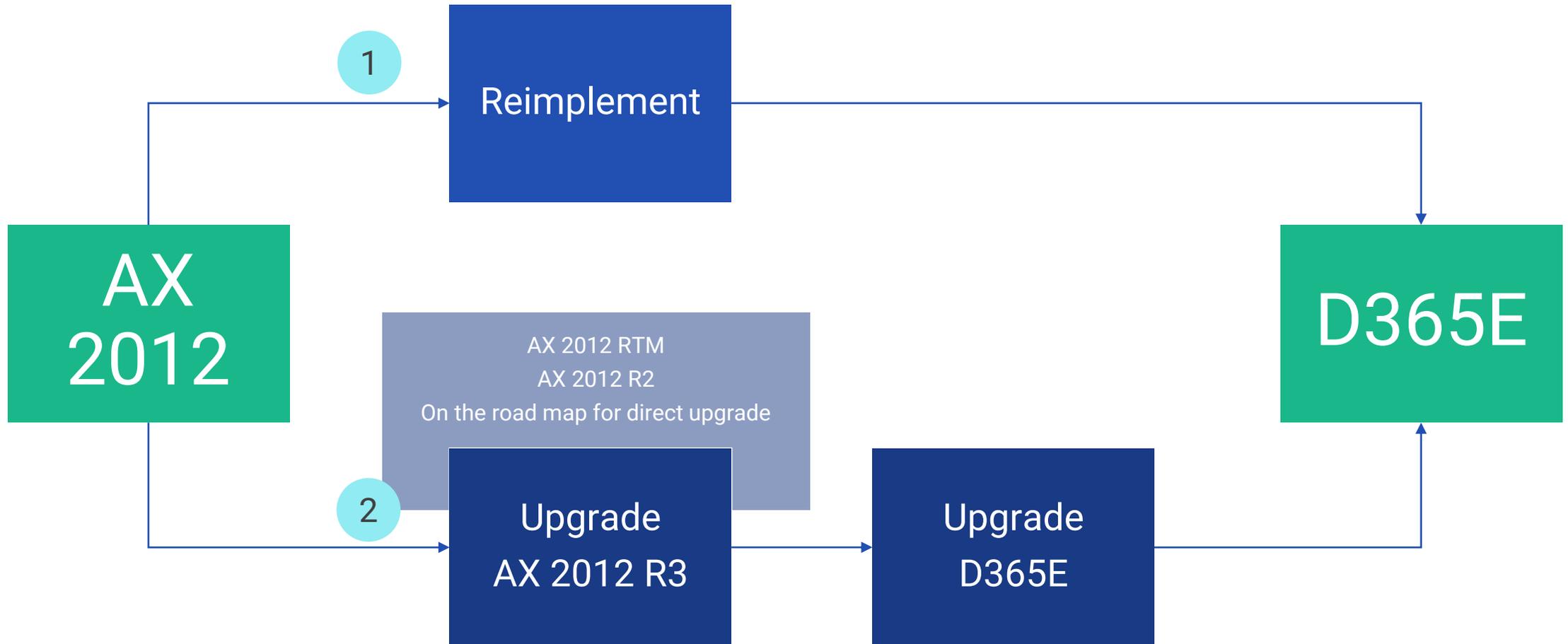
Transition to D365E Path 2 (Migrate)

- If customer's solution is heavily customized and the data is inconsistent
- Brings forward selected data only
 - X++ based framework
 - Simple and useful tool
 - Iterative process
 - Modifications to the utilities can be done to solve specific business problems
 - Delta data migrations possible

Transition to D365E Path 3 (Upgrade)

- If customer's solution is lightly customized
- Data migration is more painful than code upgrade
- Potentially requires double testing
- Higher risk

Understanding your path



— Transitions

Transition to D365E Path 1 (Reimplementation)

- Suits well for intrusively customized solutions
- Possibility to chose solution parts to reimplement
- Customizable data migration

Transition to D365E Path 2 (Upgrade)

- Code and data upgrade
- Standard Microsoft upgrade tools are used

Next step

Request BestPath Assessment for AX by providing information about the solution through www.1clickfactory.com

In the comment section specify BestPath workshop for AX

You can always contact your [1ClickFactory local office](#) to request a consultation with our AX specialist.

A person in a red jacket and dark pants is climbing a steep, snow-covered mountain slope. The background shows a large, snow-capped mountain peak under a clear sky. The overall scene is in a cool, teal-toned color palette.

Request
BestPath
assessment for AX
@1ClickFactory.com

Q&A



Thank you!

