Expect an invitation to analyze within 5 business days

Within a few business days

Agree on the upgrade details and get an order

Provide key information to request an upgrade analysis

In Upgrade Analyzer, choose an upgrade option to configure the upgrade components

Receive a fixed price proposal to present to your customer for further discussion

Execute a successful upgrade project

How to request an assessment for 1ClickFactory Upgrade for NAV and Dynamics 365 Business Central

This document is a step-by-step guide on how to request a fixed-price upgrade proposal for Microsoft Dynamics NAV/365 Business Central, the first step in the Upgrade assessment process (see the picture below).

The proposal consists of a professional and informative solution analysis that helps to eliminate economical risk when discussing the upgrade option in your company or with your customer.

An upgrade proposal is a free-of-charge service which is usually delivered by the 1ClickFactory team within one week of the partner presenting all the prerequisites necessary to perform a solution analysis.

How to request a 1ClickFactory Upgrade for Microsoft Dynamics NAV/365 Business Central proposal

To initiate the process with 1ClickFactory, please make sure you have an existing account on 1ClickFactory's Business Portal. If not, please follow these steps to register:

1. Register on the 1ClickFactory's Business Portal (it can take up to 1 business day to verify the user), or sign in if you have registered before.
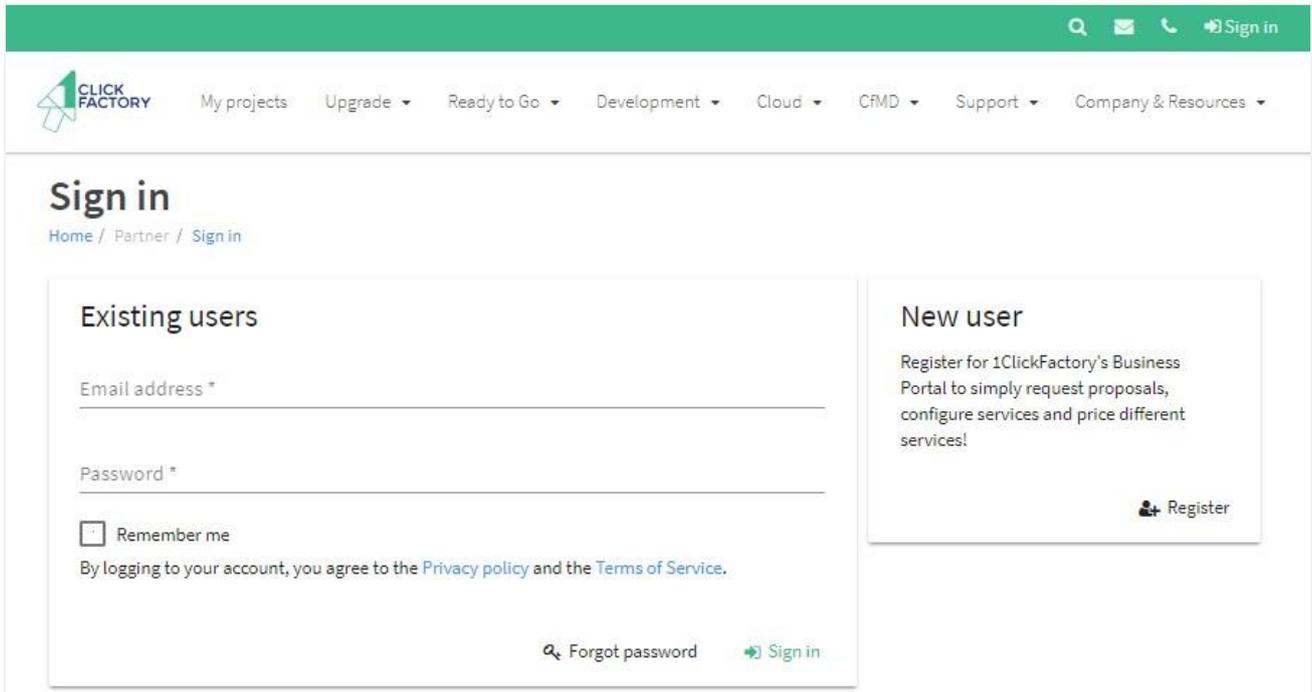
Figure 1a. Register in the 1ClickFactory Business Portal

2. To add a new upgrade request, go to http://www.1clickfactory.com and sign in.

Once you are signed into your 1ClickFactory account, open the **My Project** list and select **Create New**.
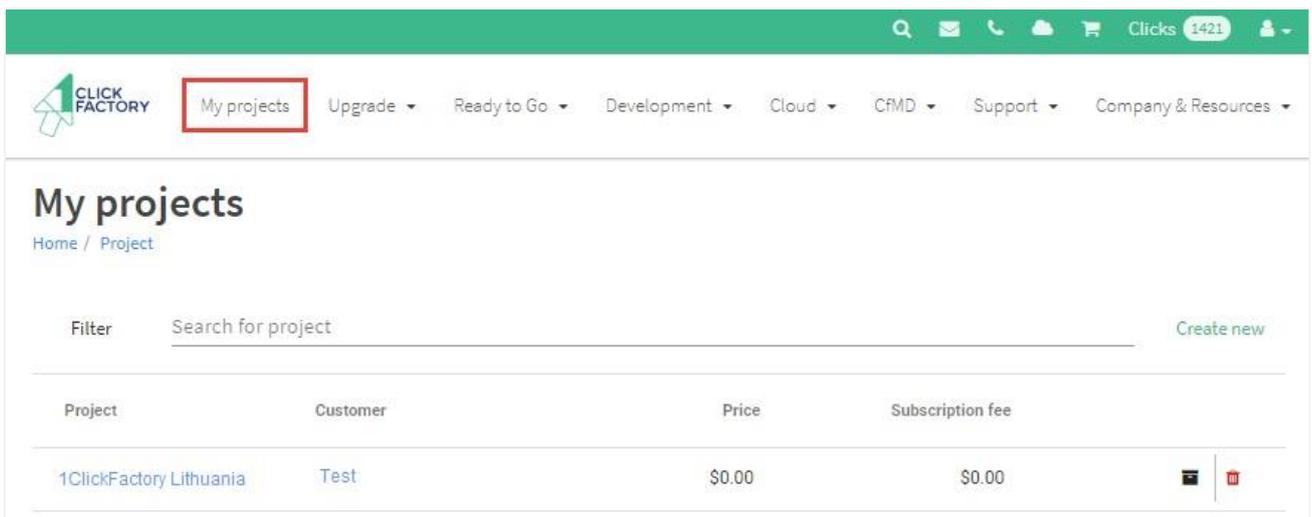
Figure 1b. Create new project

3. If you have previously created a project, you can select and configure it from the project list.
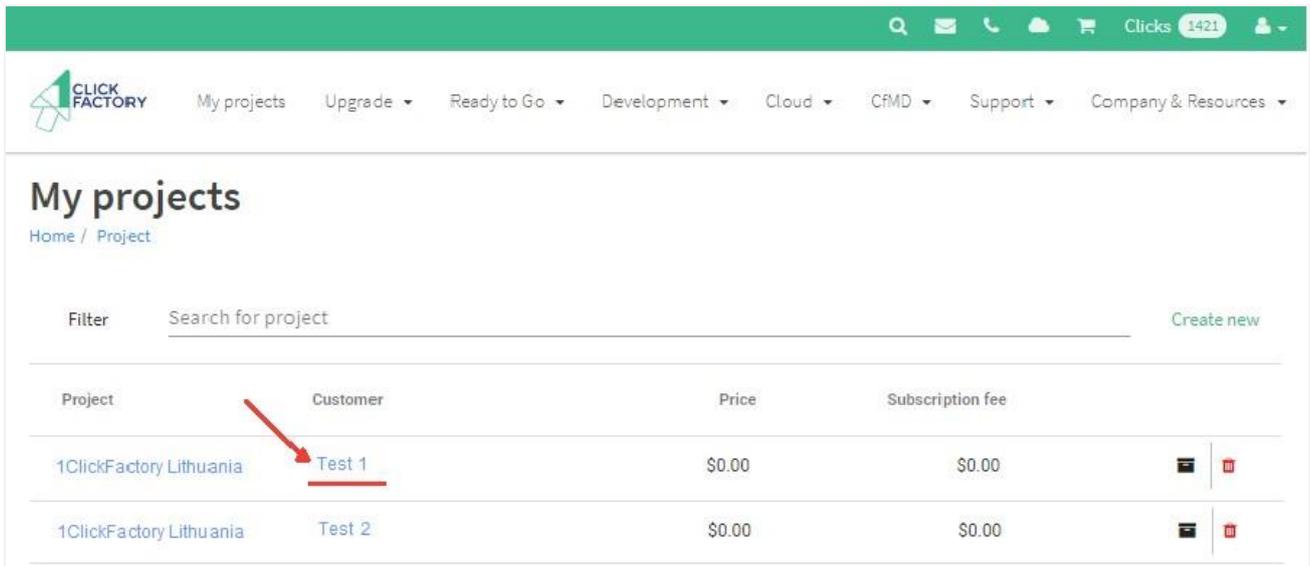
Figure 2. Selecting a previously created project

4. A window to start a new project will open. Fill out the fields **Project name** and **Customer name**.
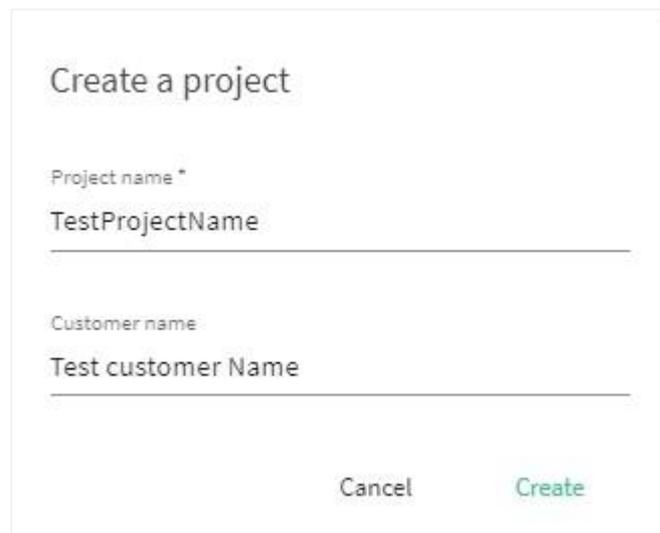

Figure 3. Create new project

5. Select the service name from the menu or select a keyword in the filter fields.
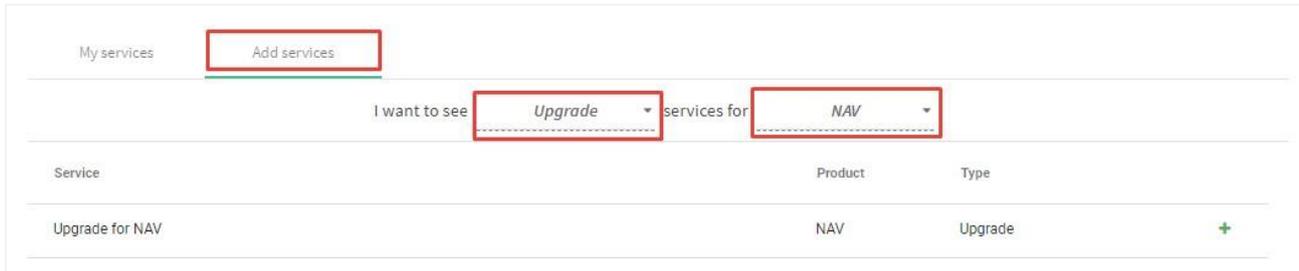
Figure 4. Select the service

6. Once all of the services are selected, click **Add** button for each one.
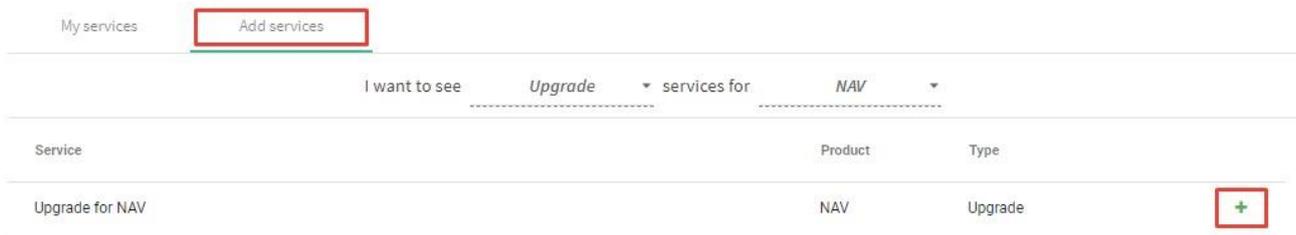
Figure 5. Add the service

7. Click on your created **Service type** to proceed further.

Figure 6. Open the service

8. A general information window will open. Fill out all of the mandatory fields that are marked with an asterisk *.

Figure 7. General information tab

9. To add an additional contact, click on the **Add contact** button and enter the required information. Click the **Add Contact** button again.

Figure 8. Add a contact

10. When all of the fields in the **General information** tab have been filled out, click **Next** to proceed further.

Figure 9. Fill out the general information tab

11. The file upload tab will open. Upload all of the mandatory files that are marked with an asterisk * and all the other required files by clicking the **Upload** button or **drag & drop** them to the highlighted area.

Figure 10. File upload tab

Note:

    a. It is advisable to compress the .fob file prior to uploading to shorten the upload time.
        i. The upload for this file might take some time. Be patient and keep the window open.
        ii. When the file has been uploaded successfully, the file name will be present on the right and the progress will be shown as 100%.
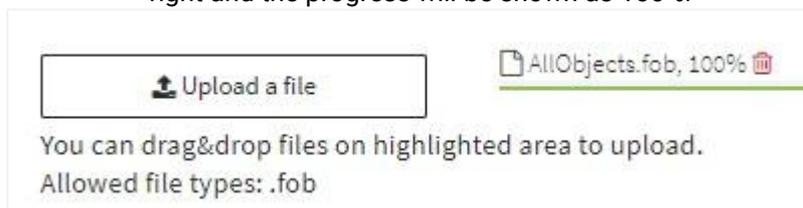
Figure 11. Successfully uploaded file

    b. To refine the project scope, it is recommended to provide a list of Report and Dataport objects to be upgraded. Since this part is the biggest upgrade challenge scope-wise, listing the exact objects to upgrade helps reduce the time and investment needed for the upgrade. Click on the link to download the Scope Taxonomy template.
    c. **Save** the project to ensure all fields are saved. The saved request can be opened for editing at any time before submitting.
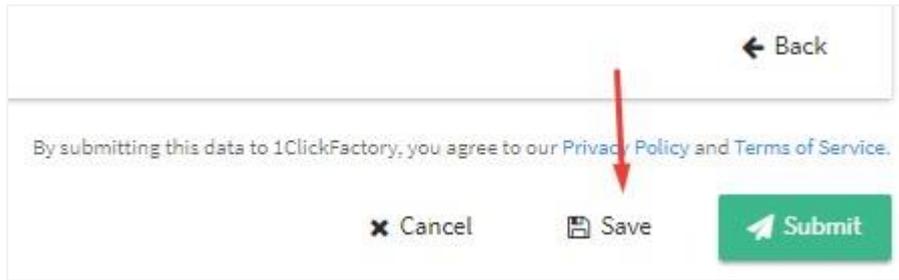
Figure 12. Save request

12. When all of the files in the **File upload** tab have been uploaded, click **Next** to proceed further.
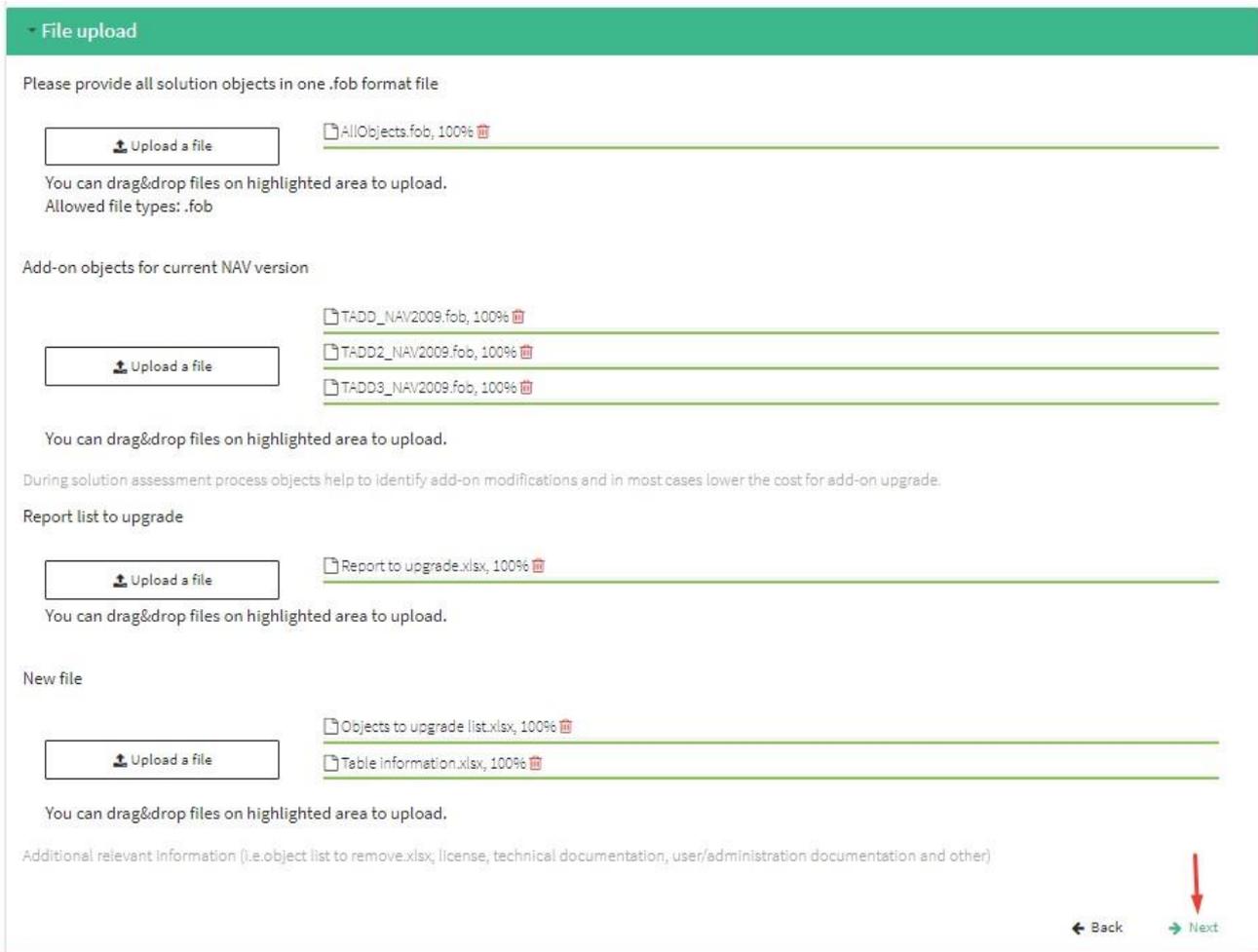
Figure 13. Filled-out file upload tab

13. In the **Comments** tab, enter any comments that are important for the request.

Figure 14. Comments tab

14. Once all the tabs are filled out, submit the project by clicking the **Submit** button.
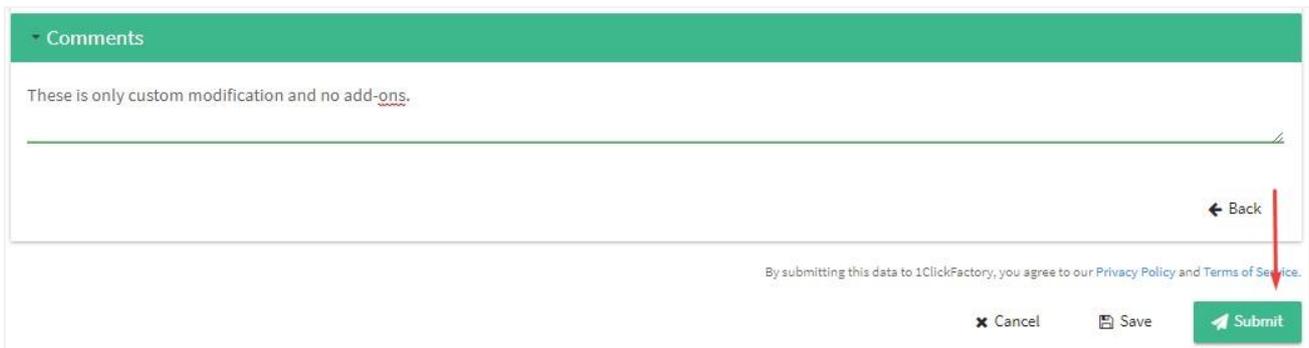
Figure 15. Submit the request form

15. After submitting you will receive a message at the bottom that your request was submitted successfully. Click **OK** to go to My Projects or click the **My Projects** action in the menu ribbon to view the status of your project.

Figure 16. Go to my projects

16. In the My Projects window you can see **the status of all the** submitted requests. Click on the request type link to open your request and see all of your submitted information.

Figure 17. Click on the request link

17. If there is a need to provide relevant upgrade comments and other information that would be helpful for us (i.e., technical documentation, user/administrator documentation, manuals, list of objects to upgrade, use cases), click on the **Add more information** button.

Figure 18. Click on the "Add more information" button

18. In the More information tab, upload any additional files using the **Upload** button and write comments in the comment field.

Figure 19. Upload any additional files and write comments

19. Once you've provided everything, click the **Submit** button.

Figure 20. Click "Submit" button

20. You will return to the **My Projects** window.

21. If there is a need to recalculate some changes in the request, click the **Re-estimate** button.

Figure 21. Click the "Re-estimate" button

22. The form will have the fully copied data from the previous estimates.

Upgrade for NAV

Home / Project / partner.project / Service /

Project name	Customer name
Test Project Name	Test Customer Name

General information

Expected Go-live date

2018-09-04

Expected delivery date from 1ClickFactory

2018-09-04

New contact

Test Contact (testcontact@1clickfactory.com)   [Add contact]

Current database (objects) version

Microsoft Dynamics NAV 2009

New database (objects) version

Microsoft Dynamics NAV 2018

Database type

- ✓ SQL
- ◯ Native

Client in use

- ✓ Classic
- ◯ RTC

Please note both forms and pages might be present in the solution. If classic client is in use then forms transformation will be included into project scope while pages will be skipped. In case Role Tailored client (RTC) is in use, pages will be taken into account and forms skipped.

Data migration of test database

☑ Data migration needed
Un-check the box if you do not wish to receive a proposal for the data migration of test database, data migration issues resolution, data migration tools optimization and guidelines to perform data migration.

Current database size in GB

50

No of companies to upgrade

3

← Back   → Next

Figure 23. The form with the fully copied data

23. Once the information has been updated and all the tabs filled out, submit the project by clicking the **Submit** button.

Figure 24. Click "Submit" button

What are the steps for an assessment for the 1ClickFactory Upgrade for NAV?

After the Upgrade for NAV/Business Central assessment has been accepted into the 1ClickFactory Upgrade Assessment Engine queue, it will go through the following steps:

Step / Status	Description
Verification if the request assets align with the information provided. Potential questions delivered to Partner.	Verification of the solution object file (.fob) and database information compliance with the provided upgrade information. In case of non-compliance, the Partner will be contacted for additional information and the assessment will remain on hold.
Data preparation for analysis.	An analysis of the provided information is complete, and the you are invited to the Upgrade Analyzer to review a number of fixed price upgrade options online.

Configure your upgrade in the online Upgrade Analyzer.	A local 1ClickFactory representative will schedule a meeting to review your first few upgrade assessments in person and answer any questions you may have. Examine out-of-the-box upgrade options, configure add-on actions, review the included components and compare their price. Complete the analysis and request a proposal when you've tailored the upgrade to fit the customer's needs.
Proposal preparation.	The proposal is prepared.
Delivery of proposal.	A local representative will schedule a meeting to review the Partner's first 1-3 assessments and answer questions. The proposal and scoping documents will be sent to the Partner.

To speed up the process, you are encouraged to provide detailed add-on upgrade options and report the transformation expectations upfront.

If you have any question, please do not hesitate to contact us at service@1clickfactory.com