

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).

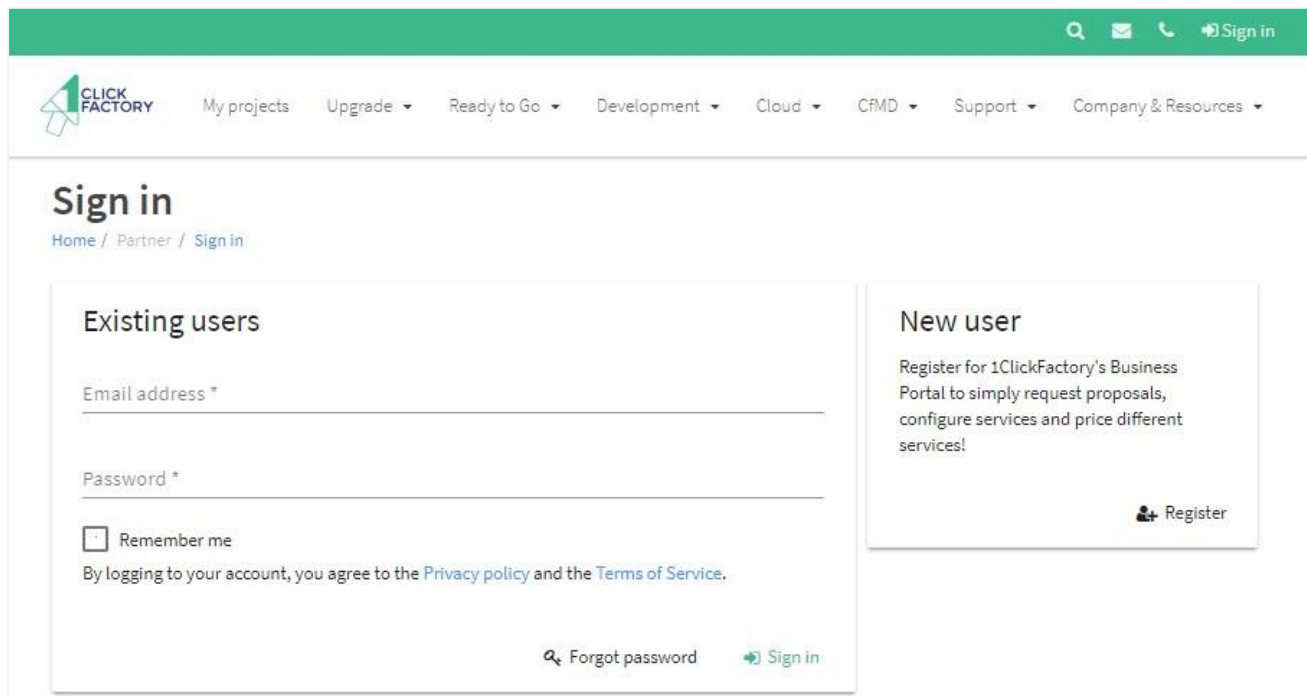
The proposal consists of a professional and informative solution analysis that helps to eliminate economical risk when discussing the upgrade option in your company or with your customer.

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:

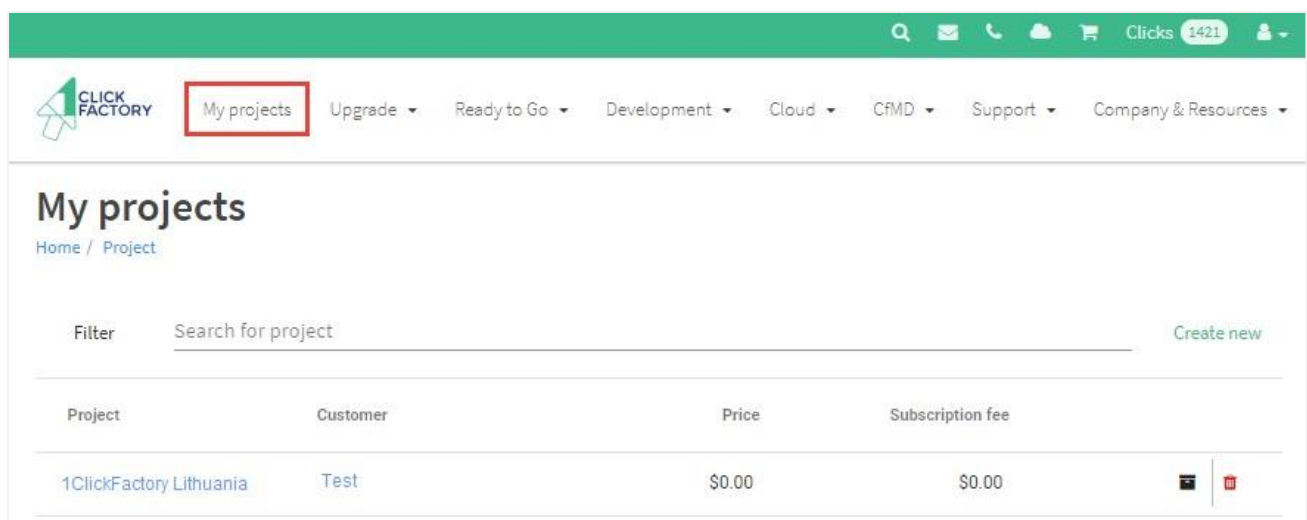
1. Register on the [1ClickFactory's Business Portal](#) (it can take up to 1 business day to verify the user), or sign in if you have registered before.



The screenshot shows the 'Sign in' page of the 1ClickFactory Business Portal. The page has a green header with the 1ClickFactory logo and navigation links: My projects, Upgrade, Ready to Go, Development, Cloud, CfMD, Support, and Company & Resources. Below the header, the 'Sign in' title is followed by a breadcrumb: Home / Partner / Sign in. The main content area is divided into two sections: 'Existing users' and 'New user'. The 'Existing users' section contains input fields for 'Email address *' and 'Password *', a 'Remember me' checkbox, and a link to 'Forgot password'. The 'New user' section contains a 'Register' button. A 'Sign in' button is located at the bottom right of the 'Existing users' section.

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**.



The screenshot shows the 'My projects' page of the 1ClickFactory Business Portal. The page has a green header with the 1ClickFactory logo and navigation links: My projects (highlighted with a red box), Upgrade, Ready to Go, Development, Cloud, CfMD, Support, and Company & Resources. Below the header, the 'My projects' title is followed by a breadcrumb: Home / Project. The main content area features a 'Filter' section with a search bar labeled 'Search for project' and a 'Create new' button. Below the search bar is a table with the following data:

Project	Customer	Price	Subscription fee
1ClickFactory Lithuania	Test	\$0.00	\$0.00

Figure 1b. Create new project

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

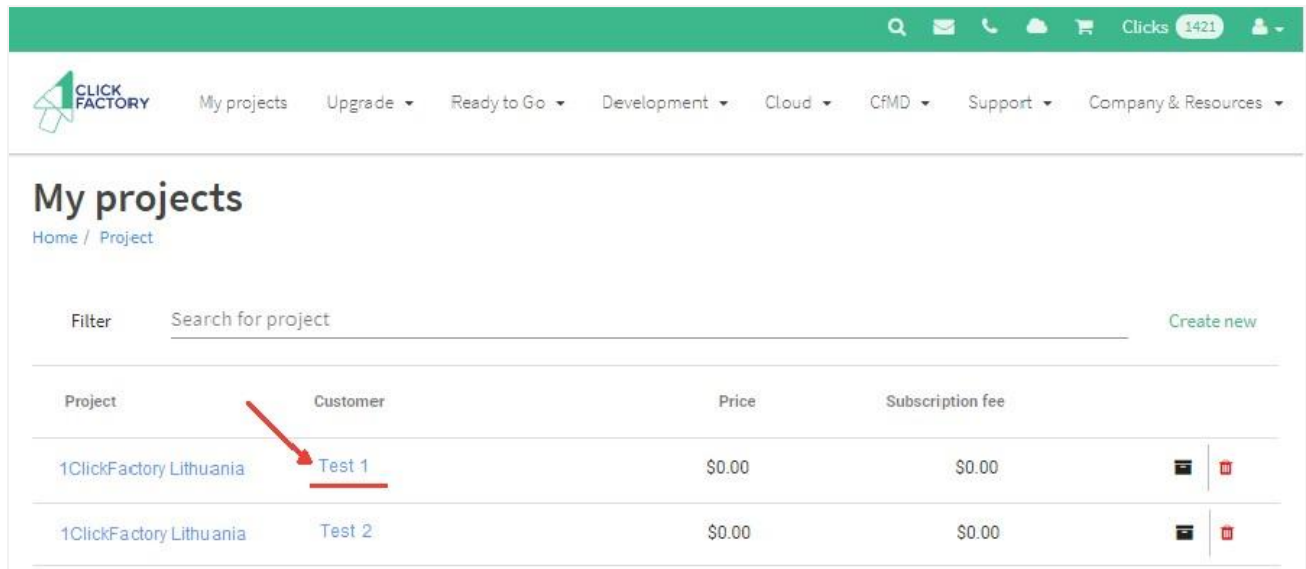


Figure 2. Selecting a previously created project

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

Create a project

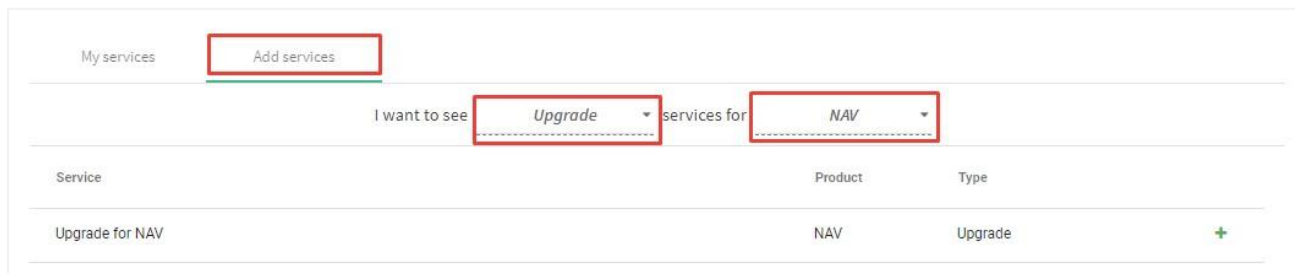
Project name *

Customer name

Cancel Create

Figure 3. Create new project

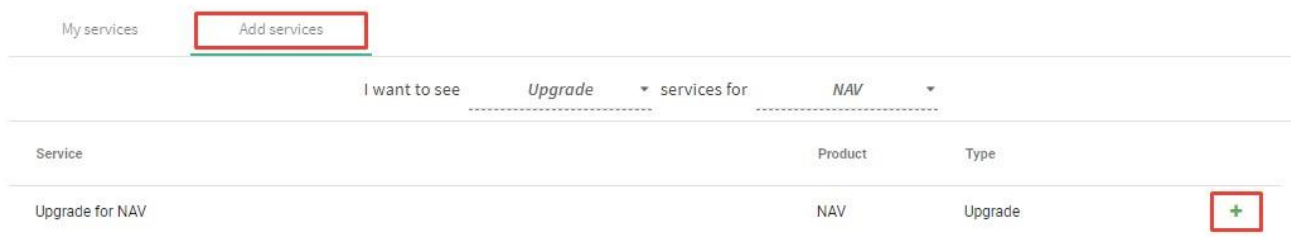
5. Select the service name from the menu or select a keyword in the filter fields.



Service	Product	Type
Upgrade for NAV	NAV	Upgrade

Figure 4. Select the service

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



Service	Product	Type
Upgrade for NAV	NAV	Upgrade

Figure 5. Add the service

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



Service	Status	Price	Subscription fee
Upgrade for NAV	Ready to configure		

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 *.

General information

Expected Go-live date

2018-09-04

Expected delivery date from 1ClickFactory

2018-09-04

New contact

Add contact

Current database (objects) version *

Select current database (objects)version...

New database (objects) version *

Select new database (objects) version...

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

0

No of companies to upgrade

0

BackNext

Figure 7. General information tab

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

New contact

Name Surname *

Test Contact

Position

Test Position

E-mail *

testcontact@1clickfactory.com

Phone

1111111

Add contact

Cancel

Figure 8. Add a contact

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

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 9. Fill out the general information tab

- 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.

File upload

Please provide all solution objects in one .fob format file *

Upload a file

You can drag&drop files on highlighted area to upload.
Allowed file types: .fob

Add-on objects for current NAV version

Upload a file

You can drag&drop files on highlighted area to upload.

During solution assessment process objects help to identify add-on modifications and in most cases lower the cost for add-on upgrade.

Report list to upgrade

Upload a file

You can drag&drop files on highlighted area to upload.

New file

Upload a file

You can drag&drop files on highlighted area to upload.

Additional relevant information (i.e.object list to remove.xlsx, license, technical documentation, user/administration documentation and other)

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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%.

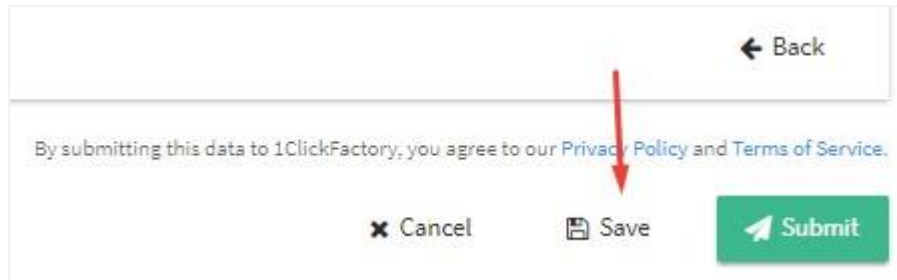
Upload a file

AllObjects.fob, 100%

You can drag&drop files on highlighted area to upload.
Allowed file types: .fob

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.

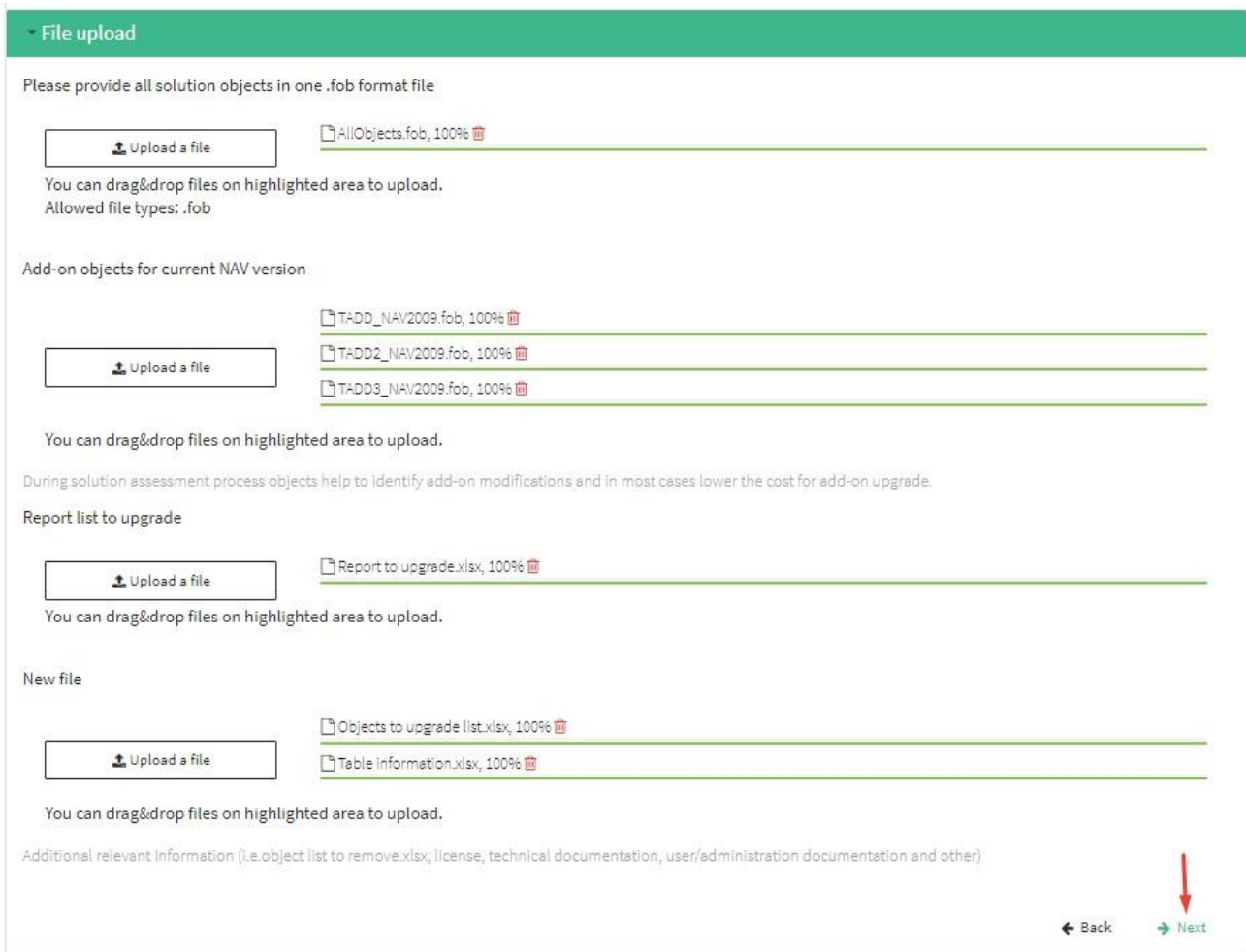


By submitting this data to 1ClickFactory, you agree to our [Privacy Policy](#) and [Terms of Service](#).

A red arrow points to the 'Save' button.

Figure 12. Save request

- When all of the files in the **File upload** tab have been uploaded, click **Next** to proceed further.



File upload

Please provide all solution objects in one .fob format file

You can drag&drop files on highlighted area to upload.
Allowed file types: .fob

Add-on objects for current NAV version

You can drag&drop files on highlighted area to upload.

During solution assessment process objects help to identify add-on modifications and in most cases lower the cost for add-on upgrade.

Report list to upgrade

You can drag&drop files on highlighted area to upload.

New file

You can drag&drop files on highlighted area to upload.

Additional relevant information (i.e.object list to remove.xlsx; license; technical documentation, user/administration documentation and other)

A red arrow points to the 'Next' button.

Figure 13. Filled-out file upload tab

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



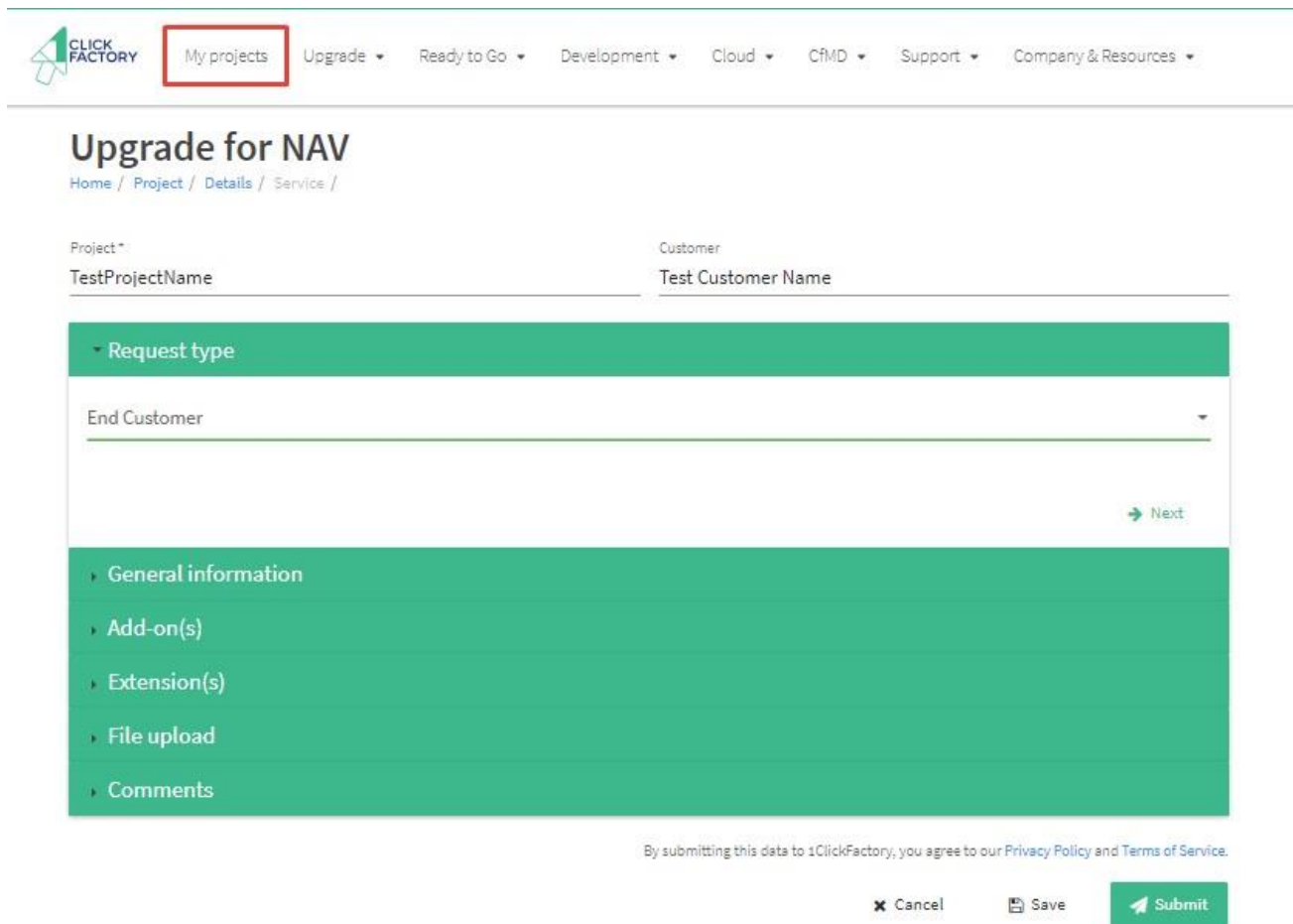
Figure 14. Comments tab

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.



Upgrade for NAV
Home / Project / Details / Service /

Project*
TestProjectName

Customer
Test Customer Name

Request type
End Customer

Next

General information
Add-on(s)
Extension(s)
File upload
Comments

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Cancel Save Submit

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.

Project details

Home / Project / Details

Project *

TestProjectName

Customer

Test Customer Name

My services

Add services

Service	Status	Price	Subscription...
Upgrade for NAV	Upgrade request received		<div><div></div><div></div><div></div></div>

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.

Project details

[Home](#) / [Project](#) / [Details](#)

Project *	Customer
TestProjectName	Test Customer Name

[My services](#)
[Add services](#)




Service	Status	Price	Subscription...
Upgrade for NAV	Upgrade request received		  

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.

Upgrade for NAV - more information

[Home](#) / [Project](#) / [Details](#) / [Service](#) / [Upgrade for NAV - more information](#)

Project *	Customer
TestProjectName	Test Customer Name

Communication history

More information

Additional file upload

 Upload a file

You can drag&drop files on highlighted area to upload.

Add any files you think would help us

Comments

Figure 19. Upload any additional files and write comments

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

Project *

TestProjectName

Customer

Test Customer Name

Communication history

More information

Additional file upload

Upload a file

Table information updated.xlsx, 100%

You can drag&drop files on highlighted area to upload.

Add any files you think would help us

Comments

We exported new table information file,please use this files.

By submitting this data to 1ClickFactory, you agree to our [Privacy Policy](#) and [Terms of Service](#).

Cancel

Submit

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.

Project details

[Home](#) / [Project](#) / [Details](#)

Project *

TestProjectName

Customer

Test Customer Name

My services

Add services

Service	Status	Price	Subscription...
Upgrade for NAV	Upgrade request received		<div> <div></div> <div></div> <div></div> </div>
Upgrade for NAV	Saved in portal		<div> <div>Re-estimate</div> <div></div> </div>

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.

Project*

TestProjectName

Customer

Test Customer Name

Communication history

More information

Additional file upload

Upload a file

Table information updated.xlsx, 100%

You can drag&drop files on highlighted area to upload.

Add any files you think would help us

Comments

We exported new table information file,please use this files.

By submitting this data to 1ClickFactory, you agree to our [Privacy Policy](#) and [Terms of Service](#).

Cancel

Submit

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