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Key Steps to Ensure a Smooth Transition from Dynamics GP to Microsoft Dynamics 365 Business Central

Moving to Microsoft Dynamics 365 Business Central? Here are 7 key steps to ensure a smooth transition.

-  **1 Custom Reports** Where are they? SSRS? PowerBI? Management Reporter? Jet? Solver? Somewhere else? Pull this list together, then find out who is using them. Ask if they are still relevant. If they are, this should be a consideration in the migration. If they aren't, you just gave someone valuable time back each month!
-  **2 3rd Party Products** Increasingly more 3rd party products that companies using GP know and love (Kwiktag & Binary Stream MEM, for example) have made their products available for Business Central.
-  **3 Customizations** Do you have any dexterity or VBA customizations? What do the customizations do? Business Central is highly customizable, so the customization you had can very likely be replicated; however, it's also possible that it may no longer be needed.
-  **4 Version Numbers** If you plan to use the migration tool, make sure that your GP and SQL versions are compatible. If you are planning to deploy Business Central on-premises, you should share the hardware requirements with your hosting provider and/or IT team.
-  **5 Integrations** What applications do you have that integrate with GP today? Common examples are CRM, Warehouse Management, 3rd party payroll systems, and line-of-business billing systems. You should understand what each 3rd party does and compare it to existing Business Central functionality. You should also have a clear understanding of how each integration works.
-  **6 Data** Now is the time to determine whether you want to realign your chart of accounts. If you choose to do this, there's a simple way that will allow you to still use the out-of-the-box migration tools from GP to Business Central, and that's using the account modifier tools available in GP prior to the migration. Use this as an opportunity to clean up other data too. Remove duplicate customers/vendors and obsolete items prior to migrating. Also, consider your requirements for historical reporting. Remember that the more historical data you want to bring with you, the longer the project will be.
-  **7 Scale** What server(s) and on-premises hardware can be decommissioned or scaled back? You should work with your IT team to build this list out. This is one of the biggest cost savings areas.

How Can Schneider Downs Help?

If you have any questions about migrating to Microsoft Dynamics 365 Business Central or other technology solutions, please contact the team at contacts@schneiderdowns.com or visit www.schneiderdowns.com/technology-data-services.

About Schneider Downs Technology and Data Services

Schneider Downs Technology Advisors are committed to providing value-added technology services and solutions to our clients. We strive to create an ongoing mutually beneficial relationship with our clients by focusing on client satisfaction, delivery of quality service and the continuous education and training of our staff. In today's demanding world market, one of the most challenging tasks facing a company is utilizing and processing information effectively and efficiently.