

Case story

What does the perfect upgrade to Microsoft Dynamics 365 Business Central look like?

2021

This case story involves four parties – two Microsoft Dynamics Partners, one customer and 1ClickFactory (currently Companial). You would think that the more parties that get involved, the more complicated the project becomes, but this was a very smooth and timely upgrade to Microsoft Dynamics Business Central, with no complications or interruptions. In other words: the perfect upgrade.

First, let's introduce the team that worked on the project:

Cluster Reply was the main Microsoft Dynamics Partner involved in this project. Cluster Reply specializes in consulting, systems integration, and digital services, with a focus on the conception, design and implementation of solutions, based on new communication channels and digital media. Cluster Reply partners with key industry groups to define and develop business models made possible by new technological and communication paradigms such as artificial intelligence, big data, cloud computing, digital communications, the internet of things and mobile and social networking. In so doing, Cluster Reply aims to optimise and integrate processes, applications and devices.

C.S.A. (Consulenza Software Applicativo) was the other Microsoft Dynamics Partner involved in the project. C.S.A. assists customers during their ERP journey, from pre-sales to ongoing support and process consultancy. C.S.A. is well known and trusted because of its experience and references and it was the first to work with Microsoft Dynamics Navision in Italy and have since made it the company's sole focus. C.S.A.'s best advertising is the satisfaction of its customers, and its technical specialists not only know the product, but also know the potential problems too, so can provide the best possible solutions for your business. As Massimiliano Giussani, C.S.A. developer and consultant, says, *"We love getting the opportunity to propose ideas and solutions tested successfully on previous projects and leveraging the lesson learned to avoid errors"*.

The customer, **Novotex Italiana S.p.A.**, is a leading company in the global coated fabrics industry. It needed to upgrade from the classic Microsoft Dynamics NAV to Microsoft Dynamics Business Central.

Companial works with Microsoft Dynamics Partners around the globe to help them implement the perfect solutions for customers.

What would the perfect upgrade team, a perfect customer and a perfect upgrade look like?

With two leading Microsoft Dynamics Partners with decades of experience working with the upgrade experts at Companial, this can definitely be called a perfect upgrade team! What brings this upgrade project to the next level is the addition of the perfect customer.

An advanced and innovative company, Novotex Italiana S.p.A. was eager to reap the benefits of the latest technologies and functionalities, but it also had a very realistic attitude and expectations towards the upgrade. The version of the solution they were using was Microsoft Dynamics NAV 5.00 SP1, and they wanted to upgrade to Microsoft Dynamics 365 Business Central (140) IT CU15, but do so as close to standard as possible.

This approach is very beneficial for an upgrade project, because having the solution as close to the standard as possible means easier and less expensive upgrades in the future. Frequently, customers using very old versions of Microsoft Dynamics NAV are used to its appearance and functionality, and don't want it to change dramatically. This requires a lot of development, various work-arounds, add-ins, and other things that make future upgrades both more complicated and more expensive. Therefore, a customer willing to stay as close as possible to the standard version is absolutely ideal!

Now let's take a closer look at the project. The upgrade project management was fully entrusted to Companial. The teams had the initial scoping workshop and discussed and agreed on activities. The Microsoft Dynamics Partners were involved only after solution delivery. The communication went smoothly through status emails, and when Companial showed the intermediate results visually, the Microsoft Dynamics Partners and the Customer were all fully satisfied and approved everything. The project took 2.5 months and was delivered on the agreed upon date. There were no issues reported after the solution delivery, even though Companial gives a warranty of 3 months. Any issues that arose were so minor, the Microsoft Dynamics Partners easily fixed them themselves. Perfect right?

When Companial's project manager, Vilius Balčikonis, was asked what made this project so smooth, the answer was simple: *"Innovative, smart and flexible Microsoft Dynamics Partners, and a Customer with the right attitude and expectations"*.

Technical upgrade information

The solution was upgraded from Microsoft Dynamics NAV 5.00 SP1 to Microsoft Dynamics 365 Business Central (140) IT CU15. What exactly was delivered?

| Deliverable | Explanation |
|---------------------|---|
| Object Upgrade | Converted objects to the new version with automated tools |
| RTC Transformation | Transformed the solution to the RoleTailored client (RTC): Forms to Pages, non-printable reports to request pages, Dataports to XMLports. |
| Reports Upgrade | Transformed classic reports to RDLC reports or ForNAV. In this case reports were transformed to RDLC reports. |
| Solution CU Update | Updated the solution to the newest CU available at the project delivery or warranty period. |
| Test Data Migration | Migrated one provided database during upgrade project. |
| Live Data Migration | Tested the migration of the customer's live database (Pre-Live) and migrated the customer's live database. |

3 Challenges Companial helped the Microsoft Dynamics partners solve

- **The customer's budget availability:** Companial provided the assurance of the result with a fixed price and delivered as scheduled – on-budget and on-time.
- **Internal Dynamics Partner resources were already allocated to other projects:** Companial enabled the Dynamics Partners to assign internal resources to more valuable projects, while maintaining the control of the upgrade project with weekly status reports and a minimum of effort on their parts.
- **Minimizing risks due to the COVID-19 pandemic:** Companial made it possible to tackle the project despite the pandemic by minimizing the project risks.

If Companial were not there to help with this project, Massimiliano Giussani says, *"We would have approached the project by ourselves [...] but this would have created a resource capacity bottleneck for us"*.

Why choose Companial for your upgrade project?

Massimiliano Giussani shares, "We have been able to provide an efficient schedule, shared with the customer, without worries about our availability. And the good result of the deliverables made the customer choose to reduce the test phase and anticipate the go-live of 2.5 months."

Based on this experience, Massimiliano Giussani would recommend working with Companial to other Microsoft Dynamics Partners. Although the project was completed in the same amount of time as if they had done it themselves, they were able to focus their resources on more profitable projects. The final migration had an impressive speed. Massimiliano shares "It saved us a weekend, and this allowed us to start on Monday morning with all the setup done, so if I had to describe the work with 1ClickFactory (currently Companial) in 1 sentence I would say: set the destination and the driving mode to autopilot, then relax and enjoy the journey".

No matter how complicated an upgrade appears to be, we're here to help! We've seen everything from unique upgrade requests, to change requests along the way, to non-standard project requirements, to clients that are way behind on Dynamics versions, to upgrading to on premises or SaaS and more! We can provide a fixed price proposal and expert help to ensure you, the Dynamics Partner, can provide the best possible solution to your end-customers.

Request an upgrade service today for a FREE upgrade analysis or contact us at service@companial.com if you have any questions.