

How to request BestPath Assessment service for Dynamics AX/Dynamics 365 Finance and Supply Chain Management through Companial business portal

1. To request the BestPath Assessment service that is needed when migrating to Dynamics 365 F&SCM, start by going to partner.companial.com, and if you have an existing account, sign-in:

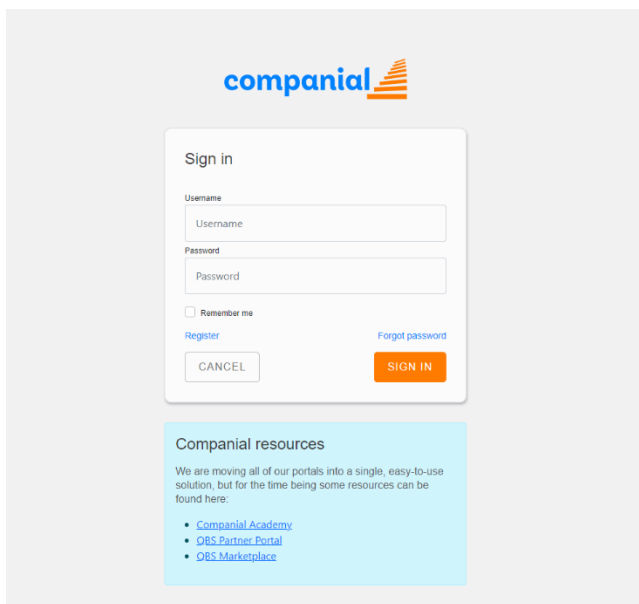
The screenshot shows the Companial sign-in interface. At the top is the Companial logo. Below it is a 'Sign in' box containing fields for 'Username' and 'Password'. There is a 'Remember me' checkbox, a 'Register' link, and a 'Forgot password' link. At the bottom of the box are 'CANCEL' and 'SIGN IN' buttons. Below the sign-in box is a 'Companial resources' section with a message about portal consolidation and three links: 'Companial Academy', 'OBS Partner Portal', and 'OBS Marketplace'.

Figure 1. Sign in page

If you don't have an account yet, select „register“ and you will be redirected to fill in the required information as per below:

The screenshot shows the 'Personal information' registration form. It has a title 'Personal information' with a blue checkmark icon. The form contains several input fields: 'First name *', 'Last name *', 'Position', 'Phone number', 'Email *' (with a note 'Please use your company-provided email'), 'Password *', 'Repeat password *', and 'Who referred you to us? We'd like to send them a thank you'. Each field has a light gray border and a small asterisk for required fields.

Figure 2. Personal information

Company information

Company name *

Company registration number

VAT number

Company address

Company city

Company post code

Country *

State

States unavailable for selected country.

Company website

Microsoft partner's name

Microsoft Partner Network ID

Figure 3. *Company information*

Once you complete entering the details, confirm registration by accepting Companial Terms of Service and Companial Privacy Policy and submit your request.

Confirm registration

☐ I accept [Companial Terms of Service](#) and [Companial Privacy Policy](#)

☐ I'm not a robot

reCAPTCHA
Privacy - Terms

CANCEL

BACK

SUBMIT

Figure 4. *Submit registration*

After your request is submitted, our team will go through the process of user verification and will get back with a confirmation to access the portal and Companial services within 2 business days. In case you have some issues while registering, don't hesitate to contact us via email service@companial.com

2. Go to *My Companial* -> *Projects* -> *My projects* and click "CREATE NEW"

Home > Project

My projects

Filter

Search for project

CREATE NEW

Figure 5. *Create new project*

- Once the window to start a new project opens, create a name for your customer or project solution.

Create a project

Project name *

BestPath Assessment for AX/D365

Customer name *

Customer Test

Cancel Create

Figure 6. Create a name for your customer and project solution

- Select the BestPath Assessment for AX/D365 F&SCM from the drop-down menu or enter the keyword in the search field:

Project details

Project * BestPath Assessment for AX/D365 Customer * Customer Test

My services Add services

I want to see services for

Name	Product name	Product type	
BestPath Assessment for AX/D365 F&SCM	AX	Analysis	+
C/AL to Extension Analyzer	NAV	Analysis	+
Code Transformation Classic Reports to RDLC for NAV/Business Central	NAV	Tools	+
D365F&O Apps Development services	AX	Development	+
Development for NAV/Business Central	NAV	Development	+
Extension Maintenance Subscription	NAV	Maintenance	+
Subscription Licensing for NAV/Business Central	Cloud	Licensing	+
Upgrade for AX/D365F&O	AX	Upgrade	+
Upgrade for NAV/Business Central	NAV	Upgrade	+

Figure 7. Select the service

- Click on the + button to add the service and then, press open to start filling the required details:

Your service has been added OPEN

Figure 8. Add service

6. Start by entering the general information:

1. Source release version
2. Source application version
3. Source kernel version
4. Current database size
5. No. of companies

General information

Source release version *

Source application version *

Source kernel version *

Current database size (in GB) *

Provide Source application and kernel version. You may find it in Help>About Microsoft Dynamics AX\Application version and \Kernel version

No. of companies *

NEXT

Figure 9. *General information*

7. If the solution does not contain any add-on(s), press "Next" to proceed entering information. To include information about the add-on(s), press the "Add add-on" button and fill the empty fields. When all the information is entered for the first add-on, press "Add add-on" for the additional add-ons. Continue this process until all add-ons are entered for the project.

Add-on(s)

Supplier name	Add-on name	Object tags	Add-on required in the new version	New add-on version available	Upgrade action
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+ Add add-on

BACK NEXT

Figure 10. *Add-on (s) information*

8. Upload an archived application files folder or a model store (for AX 2012). Once you've done that, you can upload other additional information that would include technical documentation, manuals, list of objects, etc. Then press "Next" to proceed with entering the data.

File upload

Application file *

Upload an archived application files folder or a model store (for AX 2012)

Figure 11. *Upload the files*

- Enter the additional contact information if needed. A contact person will be notified about the project details, or the team will reach out them if they can't contact you. Enter at least name and email address. Note that you can add more than one additional contact person. Once finished, press "Next" to continue entering the data.

Additional contacts

Contacts

Should we notify anyone else when we get back to you?

Contacts

Full name * E-mail * Position Phone

Finish adding or remove the contact.

Figure 12. *Additional contact information*

- Expand the "Comments" field to provide additional relevant comments regarding the BestPath Assessment. Press "Save" if you would like to have the details saved in the portal (or will want to make the changes before submitting the request) or press "Submit" if all the information is correct and complete.

Project *
BestPath Assessment for AX/D365

Customer *
Customer Test

1 General information

2 Add-on(s)

3 File upload

4 Additional contacts

5 Comments

Comments

Figure 13. *Comments field*

11. Once the request for the BestPath Assessment is submitted successfully, you will be redirected to the confirmation page. You will be able to track your project status if you press the “Back to the service list” button.

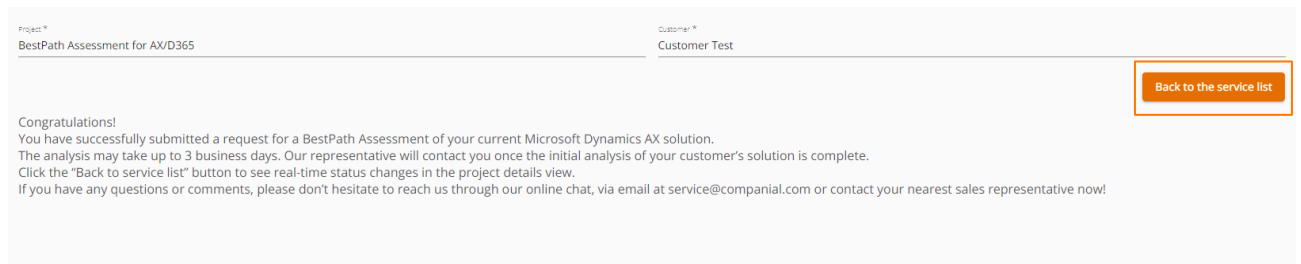


Figure 14. *Project successfully submitted*

12. You will also be able to check the status of your BestPath Assessment request by going to the status section in the service line.

Service	Status	Price	Subscription fee
BestPath Assessment for AX/D365 F&SCM	Ready to configure		

Figure 15. *Estimate request status*

13. You will also receive an automated notification email showing that your project has been submitted to our BestPath Assessment together with the project steps that will follow.

Dear [Partner Name]

You have successfully submitted a request form for Companial's Dynamics 365 Finance & Supply Chain Management BestPath Assessment initial analysis!

You can see your request details and provide additional information [here](#). To see the project status and expected proposal delivery, please go to the project details.

The BestPath Assessment steps are:

1. Verification of compliance with the service requirements based on the information provided. In case of non-compliance, you will be contacted for additional information and the assessment will be placed on hold.
2. Initial analysis. We will run the initial analysis with the provided code base and generate the results of the modified objects.
3. Proposal preparation. Once the analysis of the information provided is complete, we will generate the proposal for the BestPath Assessment workshop
4. Delivery of proposal. Our team will contact you to present the initial findings and proposal for the BestPath assessment workshop.

To speed up the process, you are encouraged to provide detailed add-on options.

Need help? Visit our [Help Center](#) or contact us at service@companial.com. We'll be happy to help.

Companial Team
service@companial.com
www.companial.com

This email and any files transmitted with it are confidential and intended solely for the use of the individual or entity to whom they are addressed. If you have received this email in error please notify the sender and delete it.

Figure 16. *Confirmation email*

Finance and Supply Chain Management Process

After you submit your BestPath Assessment request, it is then accepted into the Companial's BestPath Assessment engine queue. Your request will be processed through the following steps:

Step	Description
1. Request Verification	Verification of compliance with the service requirements based on the information provided. In case of non-compliance, you will be contacted for additional information and the assessment will be placed on hold.
2. Initial Analysis	The Companial team will run the initial analysis with the provided code base and generate the results of the modified objects.
3. Proposal Preparation	Once the analysis of the information provided is complete, we will generate the proposal for the BestPath Assessment workshop.
4. Delivery of Proposal	The proposal and the initial analysis reports will be sent to the partner. A local representative will schedule a meeting to review the analysis report together and answer any questions that are raised.

If you have any questions about submitting or processing your BestPath Assessment for Dynamics AX/Dynamics 365 Finance and Supply Chain Management request, please contact us at service@companial.com and we'll support you through the process!