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:

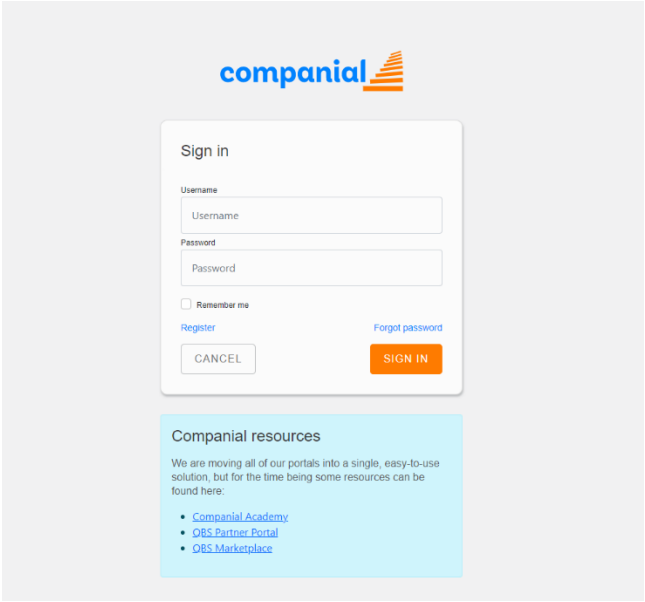


Figure 1. *Sign in page*

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

Figure 2. *Personal information*

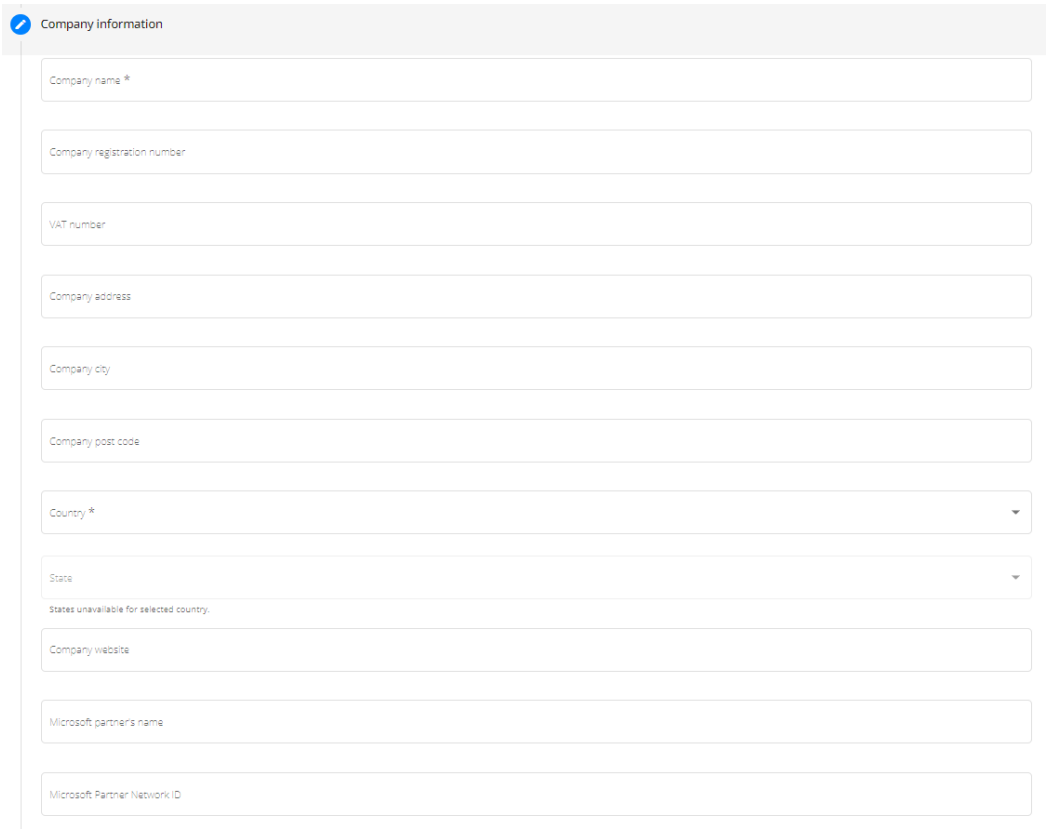


Figure 3. *Company information*

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

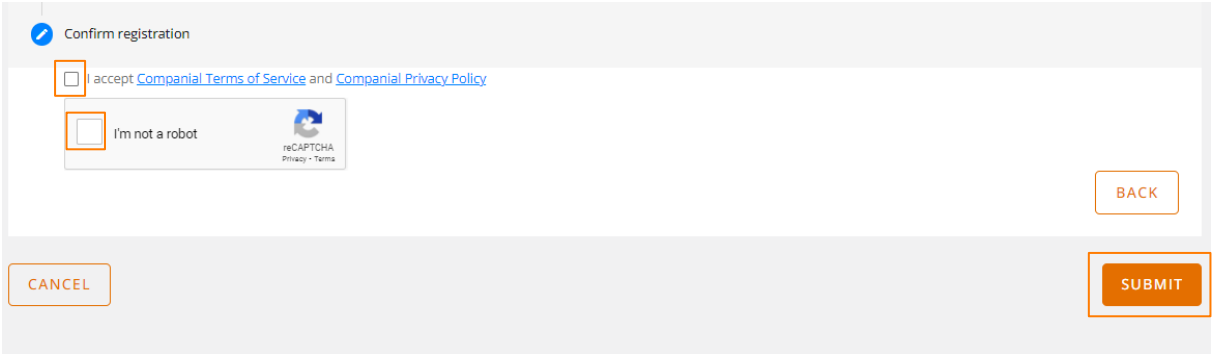


Figure 4. *Submit registration*

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"

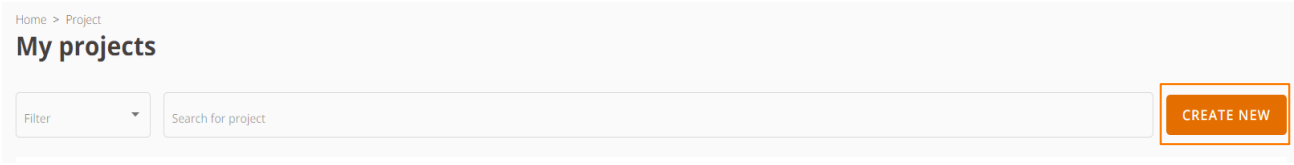


Figure 5. *Create new project*

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

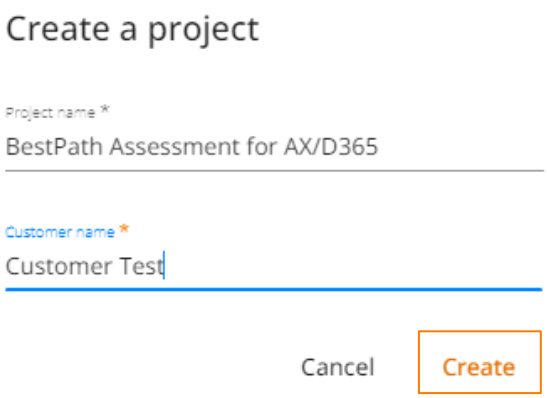


Figure 6. *Create a name for your customer and project solution*

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

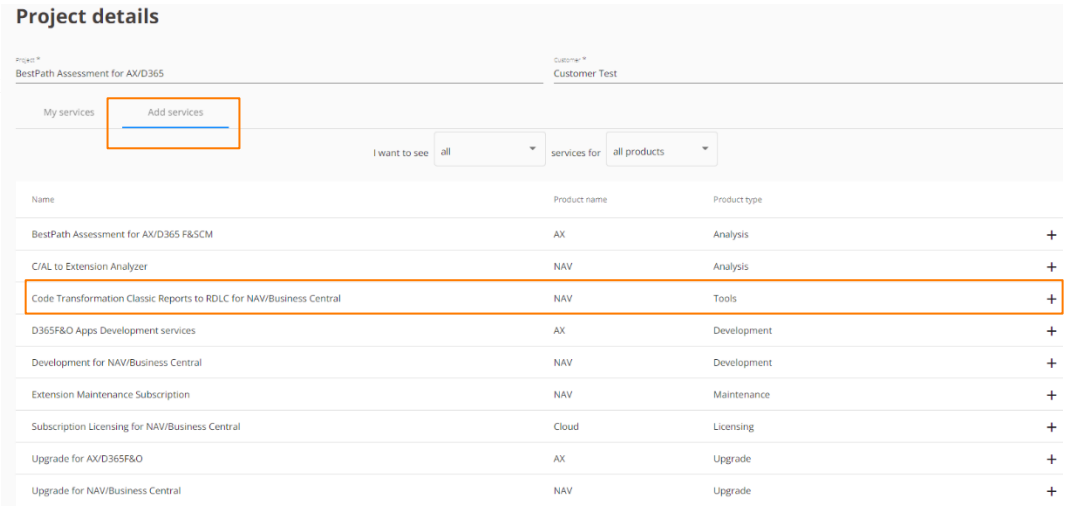


Figure 7. *Select the service*

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

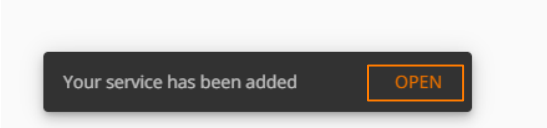


Figure 8. *Add service*

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

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.

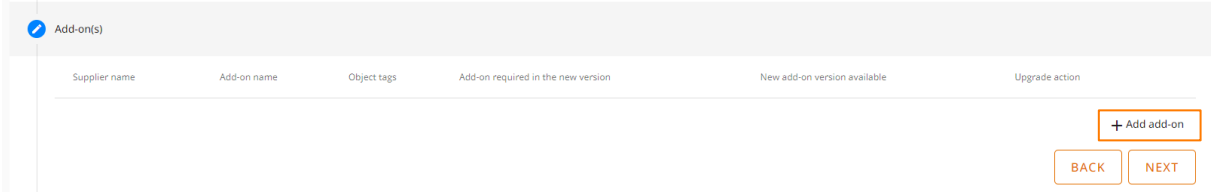


Figure 10. *Add-on (s) information*

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.

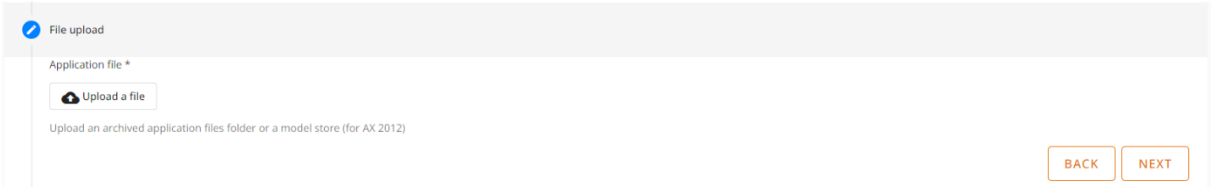


Figure 11. *Upload the files*

9. 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.

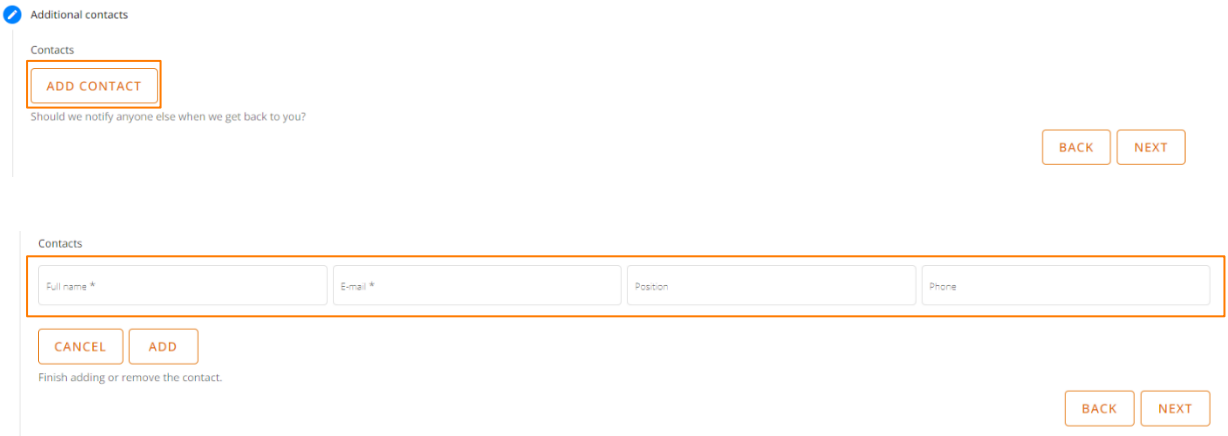


Figure 12. *Additional contact information*

10. 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.

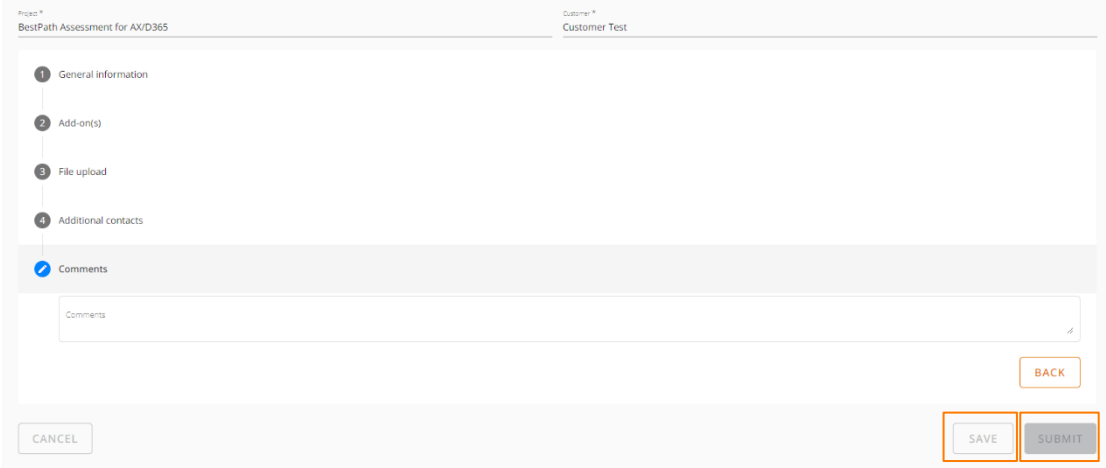


Figure 13. *Comments field*

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.

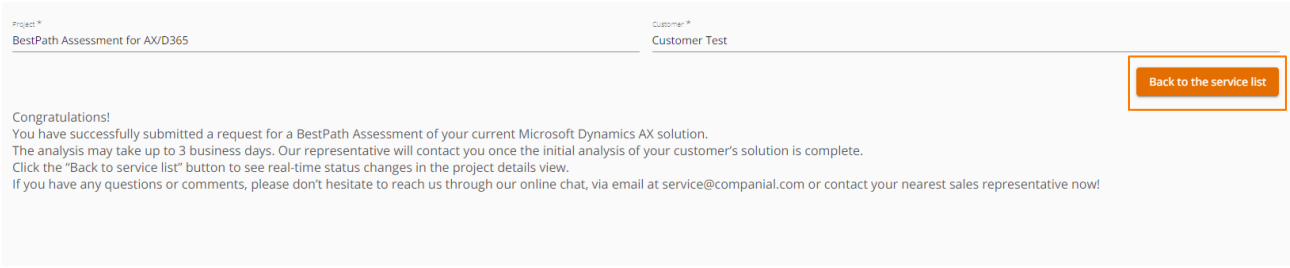


Figure 14. *Project successfully submitted*

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.

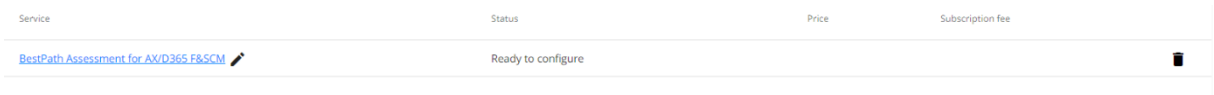
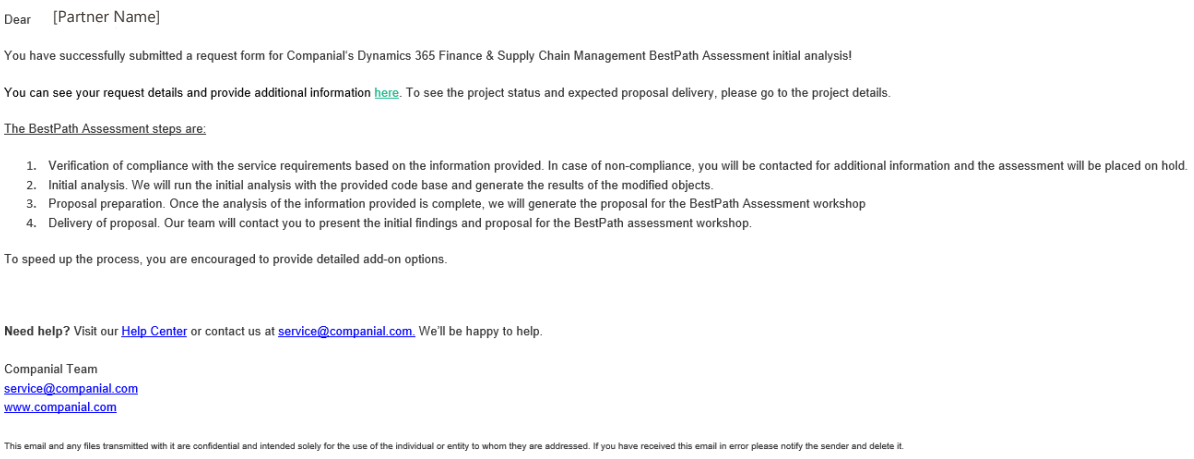


Figure 15. *Estimate request status*

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!