

Migration Overview



NAV to Business Central Migration Checklist





Strategic Planning

Objectives

Clearly defined objectives set the stage for a successful migration. Outline what you aim to achieve with the switch to Dynamics 365 Business Central for better focus and direction.

Needs Assessment

Assessing business needs ensures that the migration aligns with your organization's requirements. Identify gaps and opportunities that the new system can address for enhanced operational efficiency.

Timelines

Establishing realistic timelines is crucial for maintaining momentum. Create a detailed schedule that outlines key milestones to ensure the project stays on track and within budget.

Resource Allocation

Allocating resources effectively is key to a smooth migration. Ensure you have the right personnel and tools in place to support each phase of the transition for optimal results.



System & Environment Assessment

Current NAV Setup

Review your existing NAV environment to understand configurations, workflows, and functionalities. This assessment ensures a smooth transition and helps identify potential challenges during migration.

Customizations

Identify any customizations made within your NAV system. Documenting these will help in planning their compatibility and necessary adaptations for Business Central integration.

Hardware Evaluation

Assess your current hardware to determine if it meets the requirements for Business Central. Upgrading hardware may be necessary for optimal performance post-migration.

Compatibility Check

Verify that all existing integrations, modules, and third-party applications are compatible with Business Central. This step is crucial for maintaining seamless operations after the migration.



Data Preparation

Cleanse Data

Ensure all data is accurate and up-to-date, removing duplicates and irrelevant records to enhance the quality of information in the new system, ensuring a smooth transition.

Archive Records

Identify and safely archive old records that are no longer necessary for daily operations, allowing for a more streamlined migration process and improving system performance post-migration.

Validate Integrity

Perform thorough checks to confirm data integrity, ensuring that all information transferred maintains its accuracy and relevance, which is crucial for efficient business operations in the new system.

Plan Migration

Develop a comprehensive data migration plan that outlines timelines, responsibilities, and methods for transferring data, ensuring minimal disruption to business activities during the transition.



Migration Path & Scope

Migration Approach

Determine the most suitable migration strategy for your organization, ensuring alignment with business objectives and stakeholder expectations while minimizing risks during the transition to Business Central.

Project Scope

Clearly define the project scope by identifying key functionalities and modules to be migrated, ensuring all stakeholders are informed and aligned to avoid scope creep during the project.

Downtime Planning

Plan for potential downtime during the migration process, establishing a timeline that reduces impact on business operations and ensures a smooth transition for all users and stakeholders involved.

Data Transfer Limits

Set data transfer limits based on your organization's needs and infrastructure capability, ensuring efficient data handling while maintaining data integrity throughout the migration process.



Partner & Tools

Migration Partner

Choosing the right migration partner is crucial. Look for experience and expertise in Dynamics 365 Business Central to ensure smooth project execution and support throughout the process.

Migration Tools

Evaluate and select appropriate migration tools that align with your needs. These tools should facilitate data transfer, customization, and system integration, making the transition more efficient and streamlined.

Necessary Licenses

Securing the necessary licenses for Dynamics 365 Business Central is vital. Ensure compliance with licensing agreements and confirm that all team members have the required access for effective migration.

Support Setup

Establish a support system to address potential issues during migration. This includes planning for technical assistance, ensuring resources are available, and maintaining open communication with stakeholders.



Training & Change Management

Staff Training

Provide comprehensive training sessions for all employees, ensuring everyone understands the new system functionalities and processes, which will enhance productivity and reduce resistance during the transition.

Change Management

Develop a structured change management plan that outlines the steps to facilitate a smooth transition, helping employees adapt effectively to the new system by addressing potential challenges ahead of time.

Communicating Changes

Regularly communicate updates about the migration process and changes to the system, fostering transparency and engagement among employees, which promotes a positive organizational culture during the transition.

Addressing Concerns

Actively listen to user concerns and feedback regarding the new system, providing support and answers to alleviate anxiety and build confidence in the upcoming changes and new processes.



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Testing & Validation

Data Validation

Ensure all migrated data is accurate and complete, confirming that no discrepancies exist. Implement thorough checks to maintain integrity and reliability across all data sets during the transition.

System Testing

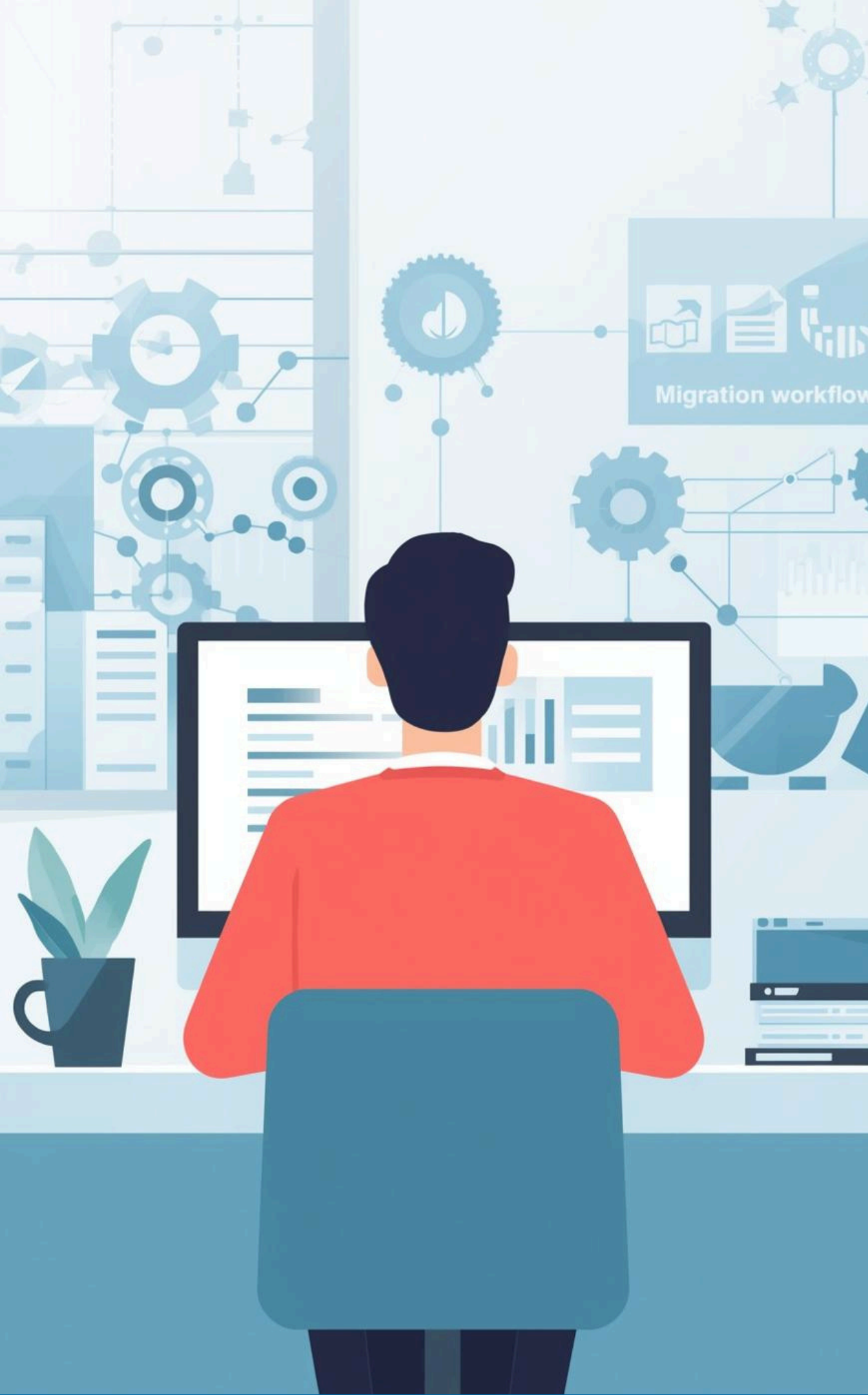
Thoroughly test the new system's functionality to verify that all components are working correctly. Assess user interfaces, workflows, and system performance to ensure a smooth experience post-migration.

Integration Validation

Validate all integrations with existing systems, confirming seamless connectivity. This step is critical to maintain operational functionality and ensure that all systems communicate effectively with one another.

Issue Resolution

Identify and resolve any issues discovered during testing. Implement a process for troubleshooting problems swiftly to minimize disruptions and ensure that the system performs optimally upon launch.

An illustration on the left side of the slide shows a person from behind, wearing a red shirt, sitting at a desk and looking at a computer monitor. The monitor displays a document with text and a bar chart. In the background, there is a complex diagram with gears, lines, and icons, including one labeled 'Migration workflow'.

Ready to move forward?

Contact Crestwood to schedule a migration consultation and get expert support throughout your NAV to Business Central journey.

[Book My Consultation](#)

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