



DFC Consultants Upgrade Form

Information provided below will be used to estimate time and viability of upgrading Dynamics GP. If you would like assistance with the form or would like to have DFC schedule a SQL Server Health Check, please call 701-281-6112. Please fax this form back to DFC at 701-281-4798 attn: Deb Schaffer or email support@DFCconsultants.com

CUSTOMER INFORMATION

Customer _____

Contact Person _____

Phone Number _____

Email Address _____

MICROSOFT DYNAMICS GP INFORMATION

Current Dynamics GP version _____

Number of Databases _____

Databases and sizes

Database	Size
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

If you have more than 6 databases, please include that information on another sheet.
This information is needed for determining approximate times to upgrade.

MICROSOFT SQL SERVER INFORMATION

Current SQL Server version _____

Do you want DFC to upgrade SQL Server? _____

SUPPORTED SQL VERSIONS FOR GP 2015

- Microsoft SQL 2012 – Enterprise or Standard Edition

SUPPORTED SQL VERSIONS FOR GP2013

- Microsoft SQL 2012 – Enterprise or Standard Edition
- Microsoft SQL 2008 R2 SP 1 or later - Enterprise or Standard Edition
- Microsoft SQL 2008 SP 3 or later - Enterprise or Standard Edition

SERVER INFORMATION

Will you be getting a new server for this upgrade? _____

Date the server will be available for upgrade? _____

Enter the server specifications below that Dynamics GP will reside on

SERVER OPERATING SYSTEM

32-bit or x64

_____	Microsoft Windows Small Business Server 2011 Standard Edition with Premium Add-on
_____	Microsoft Windows Small Business Server 2008 Premium Edition SP2 or Later
_____	Microsoft Windows Server 2008 Standard Edition SP2 or later

x64 Only

_____	Microsoft Windows 2012 – Essentials or Standard Edition
_____	Microsoft Windows Small Business Server 2011 Standard Edition with Premium Add-on
_____	Microsoft Windows Server 2008 R2 Standard Edition SP1 Edition or Later
_____	Microsoft Windows 2008 Server Standard Edition SP2 or later
_____	Microsoft Windows Small Business Server 2008 Premium Edition SP2 or later

SERVER SPECIFICATIONS:

Processor speed & number of Cores

RAM

Additional drives & disk space

Is this a virtual platform?

What kind?

VMWARE, HYPER-V, OTHER

Is this server dedicated to Dynamics GP?

If no, what other applications are running?

Which server is the domain controller?

Are the server and workstations on a domain?

This is needed for Management Reporter and other GP 2013/GP 2015 features/functionality

What is the domain name?

CLIENT WORKSTATION INFORMATION

How many workstations have Dynamics GP installed?

How many workstations would you like DFC to upgrade?

Would you like to take advantage of the GP 3013 Web Client?

About the Web Client:

Provides all employees access to GP with the web client, connecting and contributing wherever they are, from their PC or mobile device.

Microsoft Dynamics GP 2013 Web Client must be installed in a domain environment

Microsoft Dynamics GP 2013 Web Client should not be deployed on the same server that hosts the Domain Controller

And, *Minimum server requirements for hosting the GP2013 WEB Client are:

- Microsoft Windows Server 2012 - Datacenter Edition or Standard Edition
- Microsoft Windows Server 2008 R2 SP1 or later - Enterprise Edition or Standard Edition

It is recommended you acquire and install a 3rd Party Server SSL Certificate from a supplier like GoDaddy or VeriSign

Are you using Terminal Server?

If YES, how many?

Are you using Citrix?

If YES, how many?

Workstation Operating Systems

Microsoft Windows 8 Professional or Ultimate Edition

Microsoft Windows 7 Professional or Ultimate Edition

All Operating Systems Support 32-bit and 64-bit.

Each workstation must have at least 2GB of RAM

Microsoft Dynamics GP 2013 will ONLY operate on the above Operating System.

Microsoft Office

Microsoft Office 2013

Microsoft Office 2010

All Operating Systems Support 32-bit and x64.

Microsoft Dynamics GP 2013 Office Integrations will ONLY operate on the above versions.

INTERNET EXPLORER AND OTHER BROWSER INFORMATION

Only Version 10.0 (Desktop Mode Only), 9.0 and 8.0 are supported with Dynamics GP 2013.

To find version, open Internet Explorer select Help on the menu bar and click About Internet Explorer.

ADOBE ACROBAT VERSION INFORMATION

Only Version X is supported with Dynamics GP 2013.

MICROSOFT DYNAMICS GP

Do you use Dynamics GP Canadian Payroll?

Do you use Integration Manager?

If yes, how many integrations?

Please provide a list of integrations currently being used.

If yes how many users?

Do you actively use Business Portal?

What version of Business Portal?

Do you use Windows SharePoint Services (WSS)?

Requires Version 3.0 SP2 or later

Do you use Microsoft SharePoint Server (MSS)?

Foundation

Enterprise

Requires Version 2007 SP2 or later - Internet Information Services (IIS) version 6.0 or 7.0 is required.

REPORTING

Do you use FRx Financial Reporting?

FRx is no longer support in GP 2013. All FRx reports will be migrated to Management Reporter

If YES, how many FRx Reports need to be migrated to Management Reporter?

Do you use SQL Server Reporting Services reports with GP data?

SSRS is not support with SQL Server Express Edition.

Do you have any Crystal Reports with GP data?

Crystal is not supported and fixes to reports are the responsibility of the customer.

USER SECURITY

If you are currently using 9.0, Dynamics GP security has significantly changed. Security is now role and task based (ie: AP clerk that prints cheques, AR clerk that enters cash receipts). All existing security will be transferred over and can be reviewed and reconfigured before or immediately after the upgrade.

Number of User ID's set up in Dynamics GP

This can be found under Tools/Setup/System/Users/click lookup

Do you have user ID's setup in Dynamics GP that are no longer being used?

If YES, we recommend deleting these users before the upgrade

Do you use Window level security in Dynamics GP?

DYNAMICS GP – 3rd PARTY PRODUCTS & OTHER CUSTOMIZATIONS

Please provide us with all the products installed on each workstation and ensure that you include all additionally installed products.

Examples include: WennSoft, SmartList Builder, Extender, Doc-Link, and Mekorma MICR

Are you aware of any other customizations or special integrations?

If YES, please specify

MODIFIED REPORTS

Do you have any modified reports?

If YES, please list.

To view these reports, go to Tools/ Customize/Customization Maintenance To export highlight all reports and click the export button.

UPGRADE TIMELINE

Do you have dates in mind to upgrade?

NOTE: During the upgrade process your system will be down with no access to GP. We recommend not choosing payroll weeks to upgrade.

Do you want to do a test upgrade first?

If yes, a Test upgrade estimate will be included in the quote

Remote or onsite?

**Travel and related expenses will be billed at actual if on-site is chosen.*

Please review the What's New documentation for Dynamics GP 2013 and Dynamics GP 2015. Let us know if there is specific new functionality that you would like to implement.

Are there areas of training that you would be interested in after the upgrade is completed?

Please visit DFCconsultants.com website for list of upcoming classes. We also offer customized training either in Fargo or at your site.

Please review the following additional information, exclusions, and cancellation policy.

ADDITIONAL INFORMATION RELATED TO THE UPGRADE PROCESS

- All users will be logged out of Dynamics GP during the upgrade process.
- During the upgrade process your system will be down with no access to GP
- Full administrator access to the system will be provided to the consultant in advance or by staff available during the upgrade.
- Checklinks will be run prior to the upgrade. Service time during the upgrade can be reduced if this step is completed by the client
- A customer contact will be identified for this project, and will be available to the DFC Upgrade Team throughout the upgrade process
- An overtime rate of 1.5*hourly rate is billed for work performed on evenings and weekends

EXCLUSIONS

No user documentation is provided with the upgrade unless specifically requested prior to the finalized upgrade dates. Production of documentation is billable.

CANCELLATION POLICY:

For any engagements 2 days or greater in estimated duration, the Client must provide, at a minimum, 5 business days notice of cancellation. If proper notice is not provided, a cancellation fee will be assessed based on lost revenue and related, unrecoverable costs, to a maximum of \$2,000. This includes projects that have already started and projects where we have confirmed resources.

SUBMIT