

Creating a 1ClickFactory BestPath Assessment for AX/Dynamics 365 Finance and Supply Chain Management

1. To request a BestPath Assessment solution analysis that is needed when upgrading to Dynamics 365 F&SCM, go to www.1clickfactory.com, select the *My Projects* tab and then select *Create New Project*.

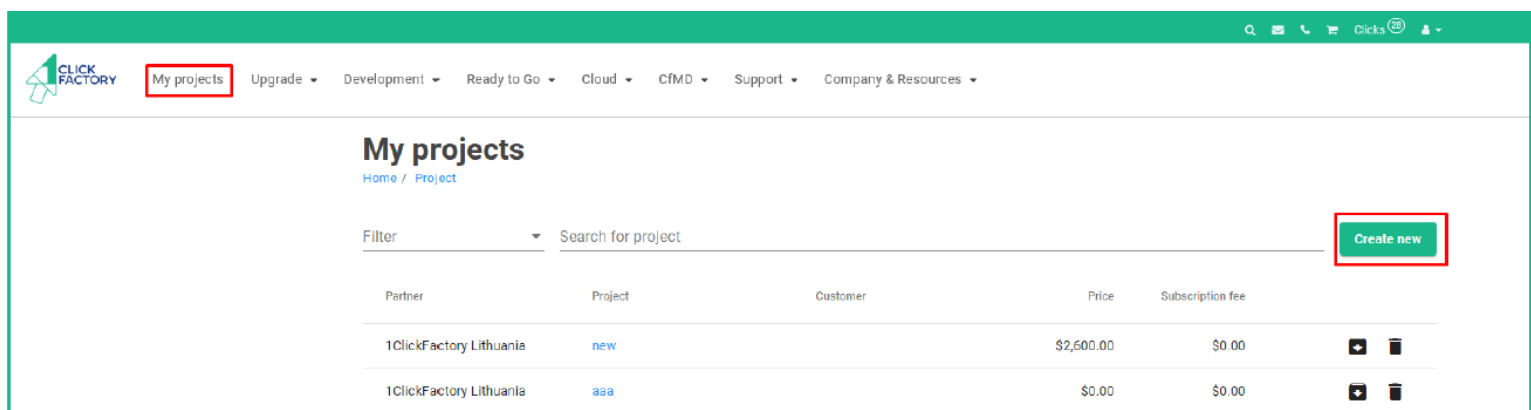


Figure 1: Create New Project

2. If you have previously created a project, you can select and configure it from the *Projects* list.

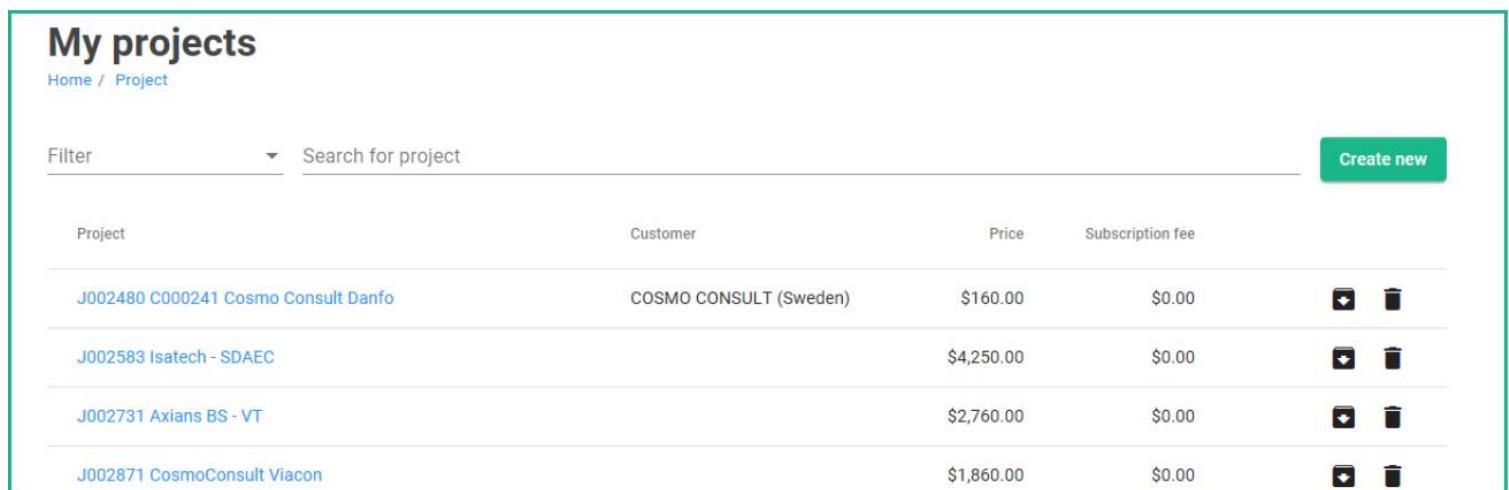


Figure 2: Projects list example

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

Create a project

Project name *

Enter project name...

Customer name

Cancel

Create

Figure 3: 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

[Home](#) / [Project](#) / [Details](#)

Project *

BestPath Assessment for AX/D365

Customer *

Customer test

My services

Add services

I want to see all services for all products

Name	Product name	Product type	
Add-on transformation to extension for NAV/Business Central	NAV	Development	+
BestPath Assessment for AX/D365 F&SCM	AX	Analysis	+
C/AL to Extension Analyzer	NAV	Analysis	+
CfMD Self-Test for NAV/Business Central	NAV	CfMD	+
Code Transformation Classic Reports to RDLC for NAV/Business Central	NAV	Tools	+
Code Transformation Dataports to XMLports 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	+
Extensions for AX/D365F&O Apps	AX	Development	+

Figure 4. Select the service name

5. Click the “Save” button to add the service.

BestPath Assessment for AX/D365 F&SCM	AX	Analysis	+
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Figure 5: Save to add the service

6. To proceed, click on BestPath Assessment for AX/D365 F&SCM highlighted in blue.



My services	Add services		
Service	Status	Price	Subscription fee
BestPath Assessment for AX/D365 F&SCM 	Saved in portal		

Figure 6: Services in the project

7. Start from entering the general information and select:
 1. Source release version
 2. Source application version
 3. Source kernel version
 4. Current database size
 5. No. of companies

Afterwards, proceed to complete the mandatory fields.

BestPath Assessment for AX/D365 F&SCM

[Home](#) / [Project](#) / [Details](#) / [Service](#) /

Project *

BestPath Assessment for AX/D365

Customer *

Customer test

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 7. General information

- 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.

Project *

BestPath Assessment for AX/D365

Customer *

Customer test

1 General information

Add-on(s)

Supplier name	Add-on name	Object tags	Add-on required in the new version	New add-on version available	Upgrade action
Supplier name	Add-on name	Object tags	<input type="checkbox"/>	<input type="checkbox"/>	Delete

+ Add add-on

Back Next

Figure 8: Add-on(s) information

9. 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.

Project *

BestPath Assessment for AX/D365

Customer *

Customer test

1 General information

2 Add-on(s)

File upload

Application file *

Upload a file

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

Other files

Upload a file

You are welcome to provide additional upgrade relevant information (i.e. technical documentation, user/administrator documentation, manuals, list of objects to upgrade, use cases)

Back

Next

Figure 9: Upload the files

10. 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.

Project *
BestPath Assessment for AX/D365

Customer *
Customer test

1 General information

2 Add-on(s)

3 File upload

Additional contacts

Contacts

Add contact

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

Back Next

Full name * E-mail * Position Phone

Cancel Add

Finish adding or remove the contact.

Back Next

Figure 10: Additional contacts

11. 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 completed.

Project *

BestPath Assessment for AX/D365

Customer *

Customer test

1 General information

2 Add-on(s)

3 File upload

4 Additional contacts


Comments

Comments

Back

✕ Cancel

Save

Submit

Figure 11: Comments field

- 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.

Back to the service list

Congratulations!

You have successfully submitted a request for a BestPath Assessment of your current Microsoft Dynamics AX solution. The analysis may take up to 3 business days. Our representative will contact you once the initial analysis of your customer's solution is complete.

Click the “Back to service list” button to see real-time status changes in the project details view.

If you have any questions or comments, please don't hesitate to reach us through our online chat, via email at service@1clickfactory.com or contact your nearest sales representative now!

Figure 12: Project successfully submitted

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







My services		Add services	
Service	Status	Price	Subscription fee
BestPath Assessment for AX/D365 F&SCM 	Submitted		

Figure 13: BestPath Assessment estimate request status

14. 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.

You have successfully submitted a request for AX/F&SCM BestPath Assessment!

 1ClickFactory
To Gintare Rimdziute

 Reply
  Reply All
  Forward
 

pn 2020-08-07 09:26

Dear Gintare Rimdziute,

You have successfully submitted a request form for 1ClickFactory'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. The proposal and the initial analysis reports will be sent to the contact's email address provided.

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@1clickfactory.com. We'll be happy to help.

1ClickFactory Team
service@1clickfactory.com
www.1clickfactory.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 14: Automated notification email

1ClickFactory's BestPath Assessment for AX/Dynamics 365 Finance and Supply Chain Management Process

After you submit your BestPath Assessment request, it is then accepted into the 1ClickFactory 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 1ClickFactory 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.

There's also another option for our partners to request the BestPath Assessment: through our 1ClickFactory portal. To make a request, sign in and go to [Upgrade->BestPath Assessment for AX/F&SCM](#).

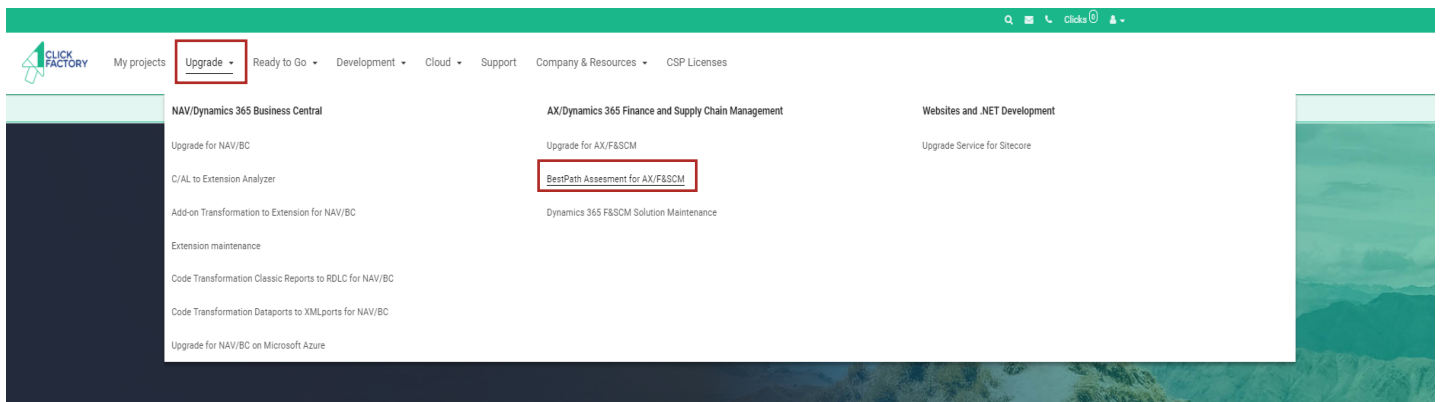


Figure 15: Request BestPath Assessment through portal

- Press on “Request service”. If you would like to add BestPath Assessment service to the existing project, choose the project from the list below and click on “Use selected project.”

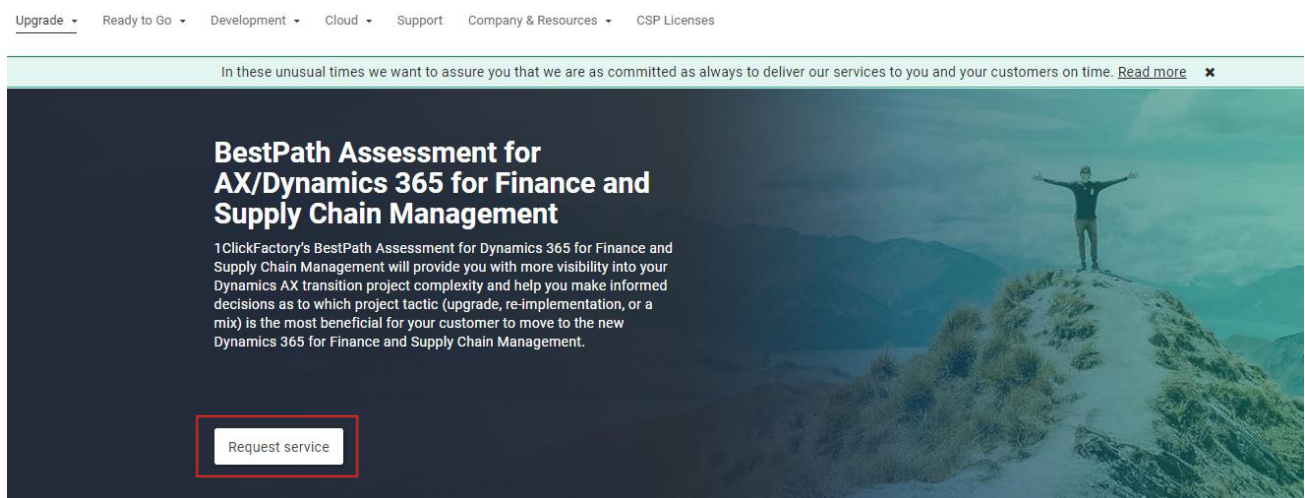
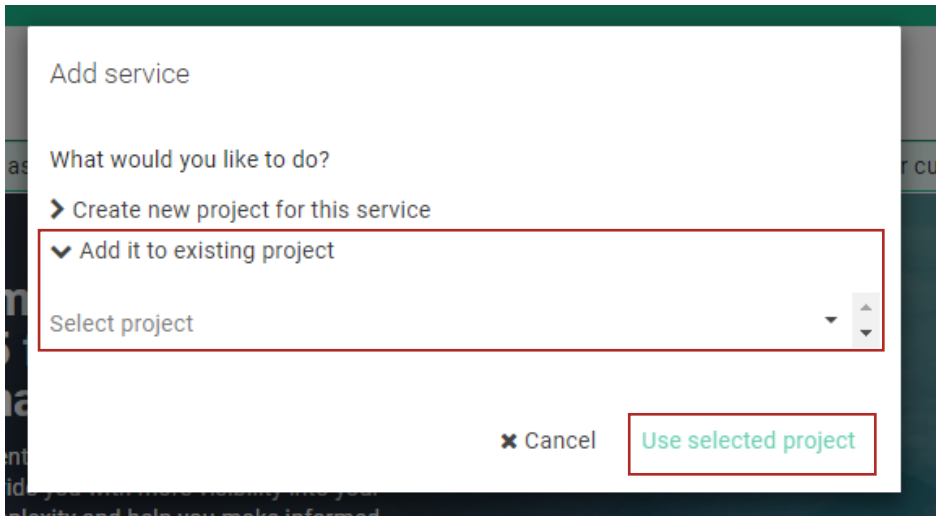


Figure 16: Request service button



Add service

What would you like to do?

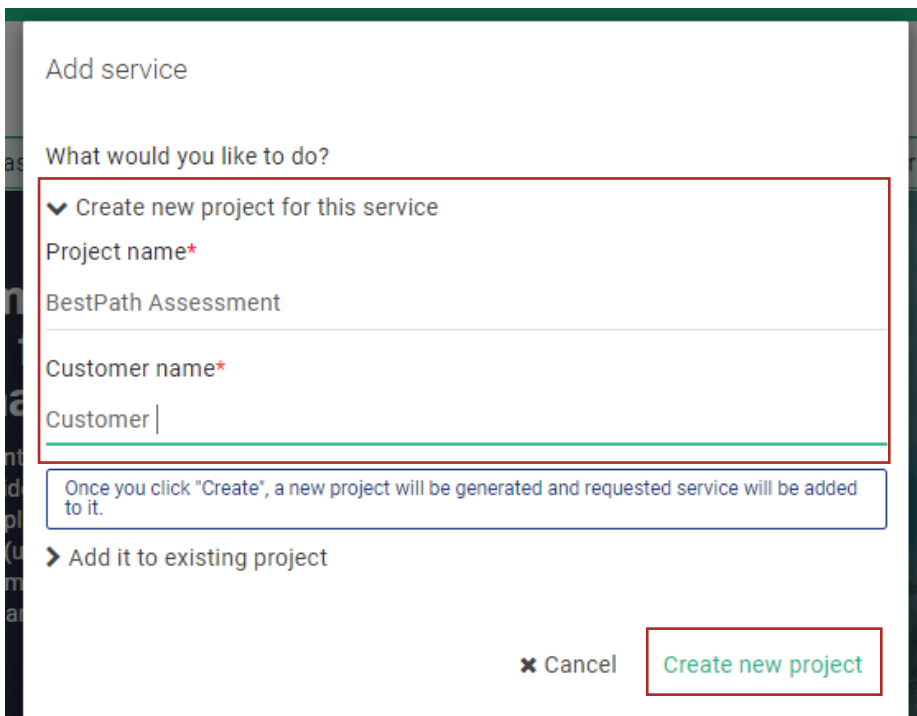
- Create new project for this service
- ▼ Add it to existing project

Select project

✕ Cancel Use selected project

Figure 17: Add service to the project

- If you'd like to create a new project, enter project and customer name, then click on "Create new project."



Add service

What would you like to do?

- ▼ Create new project for this service
- Add it to existing project

Project name*

BestPath Assessment

Customer name*

Customer |

Once you click "Create", a new project will be generated and requested service will be added to it.

✕ Cancel Create new project

Figure 18: Enter the details

When the project is created, you will be directed to the request page and will have to fill the relevant information for the successfully submitted request as per instructions mentioned in the beginning.

If you have any questions about submitting or processing your BestPath Assessment for AX/Dynamics 365 Finance and Supply Chain Management request, please contact us at service@1clickfactory.com