

The Evo-Soft Upgrade Process supplies a fixed-price upgrade proposal and Analyser tool free of charge.

Let us share the key steps in our upgrade proposal and Analyser Tool . With our extensive in-house expertise, we can help you better understand the solution as well as make it easy for you to propose and implement the upgrade.


### Step 1

## Solution Analysis

- Comparison with the standard version
  - Changes in functional areas
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### Step 2

## Comparing Old and New Versions

- Identifying the overlapping and conflict areas
  - Recommending resolution approach
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### Step 3

## Scope Evaluation

- Upgrade strategy
  - Identifying the scope and responsibilities
  - Estimating investment
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## Step 1: Solution Analysis

Your customer solution needs an upgrade from Microsoft Dynamics NAV 2018 to Microsoft Dynamics 365 Business Central 2022 Wave 1 release. During the first step we identify all modifications in functional areas and conflicts that need to be resolved to provide valuable insights.

The two tables below represent:

- Your solution's comparison with the standard version of NAV
- Changes in functional areas

### The solution's modification level in comparison with the standard version of Microsoft Dynamics NAV 2018:

|              | Base/<br>Standard<br>objects | Modified<br>base<br>objects | Changes<br>in base<br>objects | Add-on<br>objects | Changed<br>Add-on<br>objects | New<br>custom<br>objects |
|--------------|------------------------------|-----------------------------|-------------------------------|-------------------|------------------------------|--------------------------|
| Table        | 1319                         | 57                          | 147                           | 5                 | 0                            | 22                       |
| Report       | 745                          | 7                           | 1188                          | 3                 | 0                            | 75                       |
| Codeunit     | 1122                         | 6                           | 17                            | 11                | 0                            | 11                       |
| XMLport      | 51                           | 0                           | 0                             | 0                 | 0                            | 6                        |
| MenuSuite    | 4                            | 0                           | 0                             | 0                 | 0                            | 2                        |
| Page         | 2472                         | 97                          | 402                           | 45                | 0                            | 17                       |
| Query        | 83                           | 0                           | 0                             | 0                 | 0                            | 4                        |
| <b>Total</b> | <b>5796</b>                  | <b>167</b>                  | <b>1754</b>                   | <b>64</b>         | <b>0</b>                     | <b>137</b>               |

### Changes by functional area:

|                                 | Objects in the<br>functional area | Changed objects |
|---------------------------------|-----------------------------------|-----------------|
| Administration & Set-up         | 240                               | 11              |
| Financial Management            | 417                               | 16              |
| Human Resources                 | 82                                | 2               |
| Inventory                       | 357                               | 19              |
| Jobs                            | 91                                | 9               |
| Main Functionality              | 560                               | 12              |
| Manufacturing and Purchases     | 30                                | 3               |
| Manufacturing                   | 277                               | 2               |
| Purchases                       | 211                               | 33              |
| Purchases and Sales & Marketing | 17                                | 4               |
| Resource planning               | 67                                | 2               |
| Sales & Marketing               | 488                               | 42              |
| Services                        | 310                               | 7               |
| Warehouse                       | 232                               | 2               |

This analyser tool helps understand what functional areas of the solution are modified most



## Step 2: Comparing Old and New Versions

Knowing the delta between two versions from a functionality perspective is a critical selling point. To help you get prepared, we analyze the objects and Add-ons of your solution that need to be upgraded or transformed. Please take a look at the two tables below which represent:

- The list of objects with status and upgrade action (use custom, merge or re-implement) next to them.
- The list of Add-ons with upgrade action (replace, remove or upgrade "as is") next to them.

### Objects to upgrade and transform

| Object type/upgrade action | Use Custom | Merge     | Re-implement |
|----------------------------|------------|-----------|--------------|
| Table                      | 22         | 38        | 0            |
| Report                     | 74         | 7         | 0            |
| Codeunit                   | 11         | 3         | 2            |
| XMLport                    | 7          | 0         | 0            |
| MenuSuite                  | 0          | 0         | 0            |
| Page                       | 22         | 36        | 0            |
| Query                      | 4          | 0         | 0            |
| <b>Total</b>               | <b>140</b> | <b>84</b> | <b>2</b>     |

### Upgrading Add-ons

| Supplier name | Upgrade action  | Data migration action | Number of objects | Partner provides the Add-on in the RTM version   |
|---------------|-----------------|-----------------------|-------------------|--|
| 1st Add-on    | Replace         | Migrate               | 205               | Partner provides RTM version, Companial provides Add-on Cumulative Update (CU) Upgrade service |
| 2nd Add-on    | Upgrade "as-is" | Keep "as-is"          | 198               | Partner provides RTM version, Companial provides Add-on Cumulative Update (CU) Upgrade service |

In this stage, the actual scope of the upgrade project is designed:  
You can evaluate which changes are in scope and what upgrade actions are foreseen for each object.  
You can modify the scope document before starting the project to optimize the offering.

### Step 3: Upgrade Scope Evaluation

In the table below, you can see the calculations for your customer solution upgrade from Microsoft Dynamics NAV 2018 to Microsoft Dynamics 365 Business Central 2022 Wave 1 release.

#### Price estimated includes:

- **Project Management.** You will have a project manager assigned to your project who will make sure you receive constant updates on the project status and quality of the project.
- **Automated Tools.** To minimize the cost and the risk of the project, we will use automated, Companial designed upgrade tools.
- **Support.** You will have 3 months of free support after we deliver the project.

#### Assumptions made:

- We expect you to provide us with the new Add-on version for the target version, including data migration tools for direct data migration;
- Any Add-on object where the version tag includes only information about Add-ons or standard NAV tags, and the object is not set to modify, we assume that the object does not contain any changes and therefore is not included in the upgrade scope;
- We expect that you will provide Add-on objects for the old version to identify modifications done in the Add-on objects;
- If the Add-on new version is provided as an Extension, all modifications in Add-on objects and other modifications related to the Add-on will be removed and are out of scope for redesigning.
- Upgrade of usage of external components is out of scope;
- Migration of security data (roles, permissions, user logins) is performed "as-is". The setup of security data for new functionality is out of scope.
- Performance tuning is not in scope unless specifically requested;
- If the database size changes more than 20% between the assessment date and project start date, then a data migration re-estimate is necessary.

The out of scope Items will be discussed by local Partner Evo-Soft Ireland and included in the total project plan after discussion



## Upgrade estimate

| Description  | Price, USD       |
|--|------------------|
| Scope clarification workshop   | 1,199.00         |
| Object upgrade   | 13,199.00        |
| Web client redesign  | 1,599.00         |
| Customizations upgrade to standard Events  | 1,99.00          |
| Test data migration SaaS   | 4,799.00         |
| Live data migration SaaS   | 5,099.00         |
| Conversion to Extension SaaS   | 36,299.00        |
| Extension maintenance 6 months free trial  | 0.00             |
| <b>Upgrade total</b>   | <b>62,393.00</b> |
| <b>Additional (optional) services</b>  |                  |
| One extra month warranty extension guarantees available support in case it takes longer than 3 months to test an upgrade, with a 48-hour response on business days | 1,699.00         |
| Extension maintenance subscription   | 399.00           |
| Basic automated test development   | 1,099.00         |

Sample Upgrade Quote –Fixed price upgrade offering minimizes your risk.