FieldConnect

Navigating Your FieldConnect/ Microsoft Dynamics Integration Checklist

Pre-integration Evaluation

- [ ] **Conduct a thorough data audit:** Assess the health of your current field service software data. Identify and address any inconsistencies or errors before migration.

- [ ] **Dynamics version compatibility:** Ensure your Dynamics version is compatible with FieldConnect. Check for updates if necessary.

- [ ] **Review extensions and customizations (SL & GP only):** If you've implemented custom features in Dynamics SL or GP, evaluate their compatibility with FieldConnect. You may need to adjust them during integration.

Integration Planning

- [ ] **Identify integration points:** Pinpoint the specific areas where data needs to flow between your field service software and Dynamics modules. This will guide the integration process.

- [ ] **Establish migration windows:** Schedule downtime or designate specific periods for data migration to minimize disruption to your ongoing operations.

- [ ] **Backup Dynamics data:** Create a comprehensive backup of your Dynamics data using recommended mechanisms before initiating the integration process.

Data Mapping and Transformation

- [ ] **Understand Dynamics schema:** Familiarize yourself with the structure and organization of data within Microsoft Dynamics.

- [ ] **Data field alignment:** Ensure the data fields in both systems match and represent the same information. This is crucial for seamless data exchange.

- [ ] **Data transformation rules:** Set up rules to transform data from your field service software to match the format and requirements of Dynamics.

Staging, Test, or Pilot Migration

☐ **Test data selection:** Choose a representative subset of your data for initial testing. This allows you to identify and rectify any issues before migrating everything.

☐ **Monitor pilot migration:** Closely monitor the test migration process and make adjustments as needed. This helps ensure a smooth, full-scale migration.

☐ **Data integrity review:** Before proceeding, thoroughly review the migrated test data to confirm its accuracy and completeness within Dynamics.

Full-Scale Migration and Post-Integration Checks

☐ **Full-scale migration:** Once testing is successful, initiate the full-scale migration of your data with the refined processes established during the pilot stage.

☐ **Data validation:** Validate the migrated data against the defined standards within Dynamics to ensure everything is transferred correctly.

☐ **Functionality testing:** Test all functionalities within the relevant Dynamics modules to confirm they work seamlessly with the integrated data. Monitor system logs for any anomalies.

Training and Support Considerations

☐ **Develop training modules:** Create training materials focused on using Dynamics effectively after the integration. This empowers your team to leverage the new functionalities.

☐ **Knowledge base and user community:** Provide your team with access to the Dynamics knowledge base and encourage them to engage with the user community for ongoing support.

☐ **Dedicated support:** Consider implementing dedicated support during the initial phase to address any Dynamics-specific challenges that may arise after integration.

**A Comprehensive Checklist for Integrating/Migrating
Your Field Service Software with Microsoft Dynamics SL & GP**

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