



Day 1 - Project Implementation Form

Kick-off, Introduction and Finance (Part 1)

Version: K3|pebblestone Cloud 1.0

Contents

[1. Customer and Project Data 2](#_Toc15627538)

[2. Attendees by Functional Area 2](#_Toc15627539)

[3. Targets for the End of the 1st Day 2](#_Toc15627540)

[4. Pre-requisites Day 1 3](#_Toc15627541)

[4. Customer Form Day 1 – Kick-off and Introduction 4](#_Toc15627542)

COPYRIGHT

No content from this reference manual may be reproduced or made public through print, photocopy, microfilm, digitalization, storage devices, on media in any form possible without prior written consent and permission from K3 Software Solutions BV. This reference manual is and remains intellectual property of K3 Software Solutions BV.

This reference manual and its cited reference materials may be revised by K3 Software Solutions BV without prior acknowledgment.

K3 Software Solutions BV does not assume any liability, resulting in which ever form, respectively forthcoming from the content stated and illustrated in this document, including its cited references.

K3 Software Solutions BV is solely responsible for the content and may reserve the right to make omissions at its own discretion.

 © Copyright 2019, K3 Software Solutions BV, the Netherlands

## 1. **Customer and Project Data**

|  |  |
| --- | --- |
| **Customer Name** |  |
| **Implementing Consultant** |  |
| **Date** |  |
| **Project & Activities** | Kick off, Introduction and Finance (Part 1) |
| **Time Scheme** | We estimate a seven-hour duration to discuss the topics listed below. |

## 2. Attendees by Functional Area

|  |  |  |
| --- | --- | --- |
|  |  | Name of K3|pebblestone users per functional area |
| **KEY** | Key user  |  |
| **SD** | Sales Department |  |
| **PD** | Purchase Department |  |
| **WD** | Logistics / Warehouse Department |  |
| **FD** | Finance Department / Accounting |  |
| **ALL** | All K3|pebblestone users  |  |

These will be the users that will have a role in the implementation of K3|pebblestone. It is important that they attend to the sessions for their functional area. When the necessary users don’t attend, this could cause serious delays for further implementations.

## 3. Targets for the End of the 1st Day

* Implementation plan and Wholesale process overview.
* Basic setup data via Assisted Setup.
* Basic Financial setup: Chart of Accounts and Posting Groups setup.
* General setups

## 4. Pre-requisites Day 1

To make sure that we cover all the topics planned for day 1, it is essential to watch the following E-learning videos and make sure that you prepare questions if you have any.

* Demo videos:
	+ - * K3|pebblestone Item
			* Item Phases within K3|pebblestone
			* Sales ordering with K3|pebblestone
			* K3|pebblestone Presales Plan
			* Cancellations and Replacements within K3|pebblestone
			* Purchase orders creation within K3|pebblestone
			* End of season Cancellations within K3|pebblestone
			* K3|pebblestone Item Supply Planning
			* K3|pebblestone Delivery Plan

## 4. Customer Form Day 1 – Kick-off, Introduction and Finance (Part 1)

To deliver a clear and complete implementation within the set timeframe it is important that the tasks are completed within the estimated time.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Tasks** | **Estimated time (mins)** | **Attendees on functional area** | **Completed** | **N/A** |
| Kick-off and Introduction. Overview of the Implementation plan and planning the meetings ahead. | 60 | ALL |  |  |
| Assisted Setup Wizard | 30 | KEY |  |  |
| Small Break | 15 |  |  |  |
| Assisted Setup Wizard | 90 | KEY |  |  |
| Lunch Break | 30 |  |  |  |
| Chart of Accounts and Posting Groups setup | 60 | KEY/ FD |  |  |
| Number Series validation | 30 | KEY |  |  |
| Small Break | 15 |  |  |  |
| Company logo | 15 | KEY |  |  |
| Ask the questions, if necessary, about setup: Warehouse setupSales & Receivables setupPurchase & Payables setupInventory setupPebblestone Fashion setup | 75 | KEY |  |  |
| Review training |  | KEY |  |  |
| **Total hours spent**  |  **7 hours** |

|  |  |
| --- | --- |
| Additional time spent on (to be invoiced) | Minutes |
|  |  |
|  |  |
|  |  |

|  |  |
| --- | --- |
| Tasks for the customer | Deadline |
|  |  |
|  |  |
|  |  |
|  |  |

|  |  |
| --- | --- |
| Tasks for the implementor | Deadline |
|  |  |
|  |  |
|  |  |

|  |
| --- |
| Remarks |
|  |

|  |  |
| --- | --- |
| Dates |  |
| **Signature for acceptance** |  |

Disputes concerning the time spent and the subjects discussed must be announced to COMPANYNAME within 3 business days after the visit of the implementer.