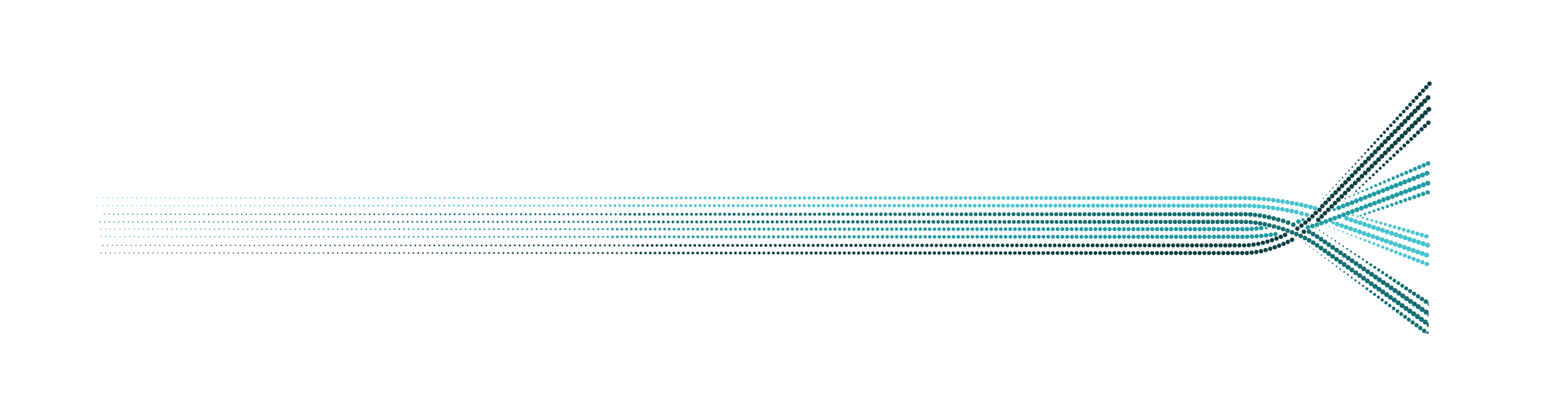
**A picture containing person, sky, outdoor, sport

Description automatically generated**



Prepare data import and Customers

Version: K3|pebblestone Cloud 1.0

Day 2 – Project Implementation form

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## **Customer and Project Data**

|  |  |
| --- | --- |
| **Customer Name** |  |
| **Implementing Consultant** |  |
| **Date** |  |
| **Project & Activities** | Prepare data import and Customers |
| **Time Scheme** | We estimate a seven-hour duration to discuss the topics listed below |

## 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.

## Targets for the End of the 2nd Day

* Preparation for the data import (Items, Customers, Vendors).
* Setup of templates for Customers
* Import Customers
* Navigate through the system
  + How to select more records in a list
  + How to filters and export to Excel
  + How to customize the Role Centre

## Pre-requisites Day 2

Sign-off the Chart of Accounts and Posting Setup.

To make sure that we cover all the topics planned for day 2, 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
* Online Academy:
  + - * Sales
        + Customer creation
      * Purchase
        + Vendor creation
      * Item Management
        + Item Creation
        + Styles
        + Colors
        + Color Groups
        + Sizes
        + Item categories
        + Seasons
        + Brands
        + Collections
        + Genders
        + Compositions

## Customer Form Day 2 – Prepare data import and Customers

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 |
| Answering the questions from day 1, or from watching the videos to prepare for day 2.  *Sign off: Chart of Accounts and Posting Setup* | 30 | KEY |  |  |
| Explain and preparation of the data import (items, customers and vendors) | 60 | KEY |  |  |
| Small Break | 15 |  |  |  |
| Explain and preparation of the data import (items, customers and vendors) | 60 | KEY |  |  |
| Explanation of the Customer Card | 30 | SD/ FD |  |  |
| Lunch Break | 30 |  |  |  |
| Customer Templates | 60 | SD/ FD |  |  |
| Customer Status, Credit Limit and Salesperson | 30 | SD/ FD |  |  |
| Small Break | 15 |  |  |  |
| Deviations in Bill-to and / or Ship-to Addresses | 30 | SD/ FD |  |  |
| Spend some time together in filling the Customer Excel Import | 60 | SD/ FD |  |  |
| 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.