****



Prepare data import and Customers

Version: K3|pebblestone Cloud 1.0

Day 2 – Project Implementation form

Contents

[1. Customer and Project Data 2](#_Toc15587627)

[2. Attendees by Functional Area 2](#_Toc15587628)

[3. Targets for the End of the 2nd Day 2](#_Toc15587629)

[4. Pre-requisites Day 2 3](#_Toc15587630)

[5. Customer Form Day 2 – Prepare data import and Customers 4](#_Toc15587631)

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

## **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.