k3pebblestone

Day 2 – Project Implementation form

Prepare data import and Customers
Version: K3|pebblestone Cloud 1.0

Contents

1. 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

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 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

4. 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

5. 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.