GP to BC Migration

Limited versions of GP can do the Cloud Migration

- GP 2015 R2 or newer
- Must use SQL Server 2016 or a later version and the database must have compatibility level 130 or higher.
- Can bring over all GP companies or pick and choose which companies to bring over.
- Only a limited amount of data is mapped in the Cloud Migration and then you do not have the option to clean the data prior to migration; except for minor chart changes and inactivation of vendor/customer records. Any other changes you want need to be done in GP ahead of time.
- This does not include Fixed Assets. We can put this on a separate estimate if you have Fixed Assets.
- This does not include building your financial statements. We can put this on a separate estimate if you would like anything more than the out of the box financial statements.
- This includes 5 hours of User Acceptance Testing assistance. This can be billed as a support ticket if additional time is needed.
- This does not include user management time; basic permissions will be assigned but no custom permissions will be created.
    - The project will include:
    - 15 hours of training
    - Set up 1 bank statement import
    - Set up 1 Eft mapping
    - Set up 1 AP check format



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When you migrate from Dynamics GP, the following information is migrated from Dynamics GP to Business Central online:

1. Fiscal periods

The fiscal periods setup in Dynamics GP will be migrated to Business Central as accounting periods. Any years marked as historical in Dynamics GP will come over to Business Central as open and will must be closed in Business Central. If any adjustments need to be made to historical years after migrating, those adjustments can be done before closing the year.

2. Chart of Accounts master records

The account number in Business Central will be mapped from the main account segment from Dynamics GP. Remaining account segments are then defined as dimensions in Business Central.

Let us look at an example of an account from Dynamics GP, using the year 2022 as an example:

Account in Dynamics GP	Year	Name
000-1100-00 Cash	Yes 2022	Period 1
		Period 2
		Period 3
000-1100-01 Cash	Yes 2022	Period 1
		Period 2
		Period 3
000-4000-00 Sales	Yes 2022	Period 1
		Period 2
		Period 3

The migration creates two accounts in Business Central, number 1100 and number 4000. New dimensions are also added with the names 000, 00, and 01. General journal transactions are created as follows:

Transaction date	Account No.	Amount	Dimensions
1/31/2022	1100	250.00	Dimension 000, 00
1/31/2022	1100	240.00	Dimension 000, 01
1/31/2022	4000	490.00	Dimension 000, 00
2/28/2022	1100	117.00	Dimension 000, 00
2/28/2022	1100	102.00	Dimension 000, 01
2/28/2022	4000	219.00	Dimension 000, 00
3/31/2022	1100	340.00	Dimension 000, 00
3/31/2022	1100	501.00	Dimension 000, 01
3/31/2022	4000	841.00	Dimension 000, 00

The data migration generates dimensions on that account based on the different segments. User will see a Department dimension with the values 000, 100, and 200, respectively. A second dimension, Division, will show the values 00, 01, and 02, respectively.

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Account summary transactions are generated and posted for open and history years that were set up in Dynamics GP. The summary amounts are created based on the fiscal periods set up in Dynamics GP. In the GP Company Migration Configuration page, you can select the oldest historical year you want migrated to Business Central. For example, if 2019, 2020, and 2021 are historical years in Dynamics GP, you could select that the oldest historical year you want migrated is 2020. Summary transactions for 2019 would not be migrated to Business Central.

3. Customer master records and outstanding transactions from the Receivables module

In the GP Company Migration Configuration page, you can choose to migrate all customers from Dynamics GP or only active customers. This allows you to not migrate over customers that have been marked as inactive. We also have added bringing all addresses from the customer over into Business Central. All of the addresses on the customer will be setup as shipping addresses in Business Central. That will allow the end user to choose the address needed when entering transactions after the migration.

In the GP Company Migration Configuration page, you can also choose to migration posting accounts on customer classes. If you choose this option, posting accounts defined on customer classes in Dynamics GP will be migrated to Business Central as customer posting groups. If a customer is assigned to a customer class in Dynamics GP, the customer will be assigned to the corresponding customer posting group after migrating.

We also bring over outstanding receivables transactions. These transactions will be brought in with the amount remaining in Dynamics GP. For example, if an invoice for $1000 was entered into Dynamics GP, and it has been partially paid and has a remaining balance of $400, the new invoice created in Business Central will be for $600 as that is the amount remaining to be paid. We bring over all transaction types from Receivables Management.

4. Vendor master records and outstanding transactions from the Payables module

In the GP Company Migration Configuration page, you can choose to migrate all vendors from Dynamics GP or only active vendors. This allows you to not migrate over vendors that have been marked as inactive. We also have added bringing all addresses from the vendor over into Business Central. All vendor addresses from the vendor are migrated to Business Central. The vendor's Remit To Address will be the main address for the vendor. All other vendor addresses will be setup as Order addresses in Business Central. That will allow the end user to choose the address needed when entering transactions after the migration.

In the GP Company Migration Configuration page, you can also choose to migrate posting accounts on vendor classes. If you choose this option, posting accounts defined on vendor classes in Dynamics GP will be migrated to Business Central as vendor posting groups. If a vendor is assigned to a vendor class in Dynamics GP, the vendor will be assigned to the corresponding vendor posting group after migrating.

Vendor EFT Bank information will be migrated to Business Central as Vendor Bank Accounts. If a Vendor's Remit to address contains EFT Bank information in Dynamics GP, it will be migrated over as the Preferred Bank Account Code on a vendor in Business Central.

We also bring over outstanding Payables transactions. These transactions will be brought in with the amount remaining in Dynamics GP. For example, if an invoice for $1000 was entered into Dynamics GP, and it has been partially paid and has a remaining balance of $400, the new invoice created in Business Central will be for $600 as that is the amount remaining to be paid. We bring over all transaction types from Payables Management.

1099 vendor information and amounts can be migrated to Business Central. An option has been added to the GP Company Migration Configuration page where you can select if you want to migrate 1099 information. The tax type, Federal ID number and 1099 box number from the vendor record will be migrated. In addition, the 1099 box amounts will be migrated for each 1099 vendor. If you select to migration 1099 information, you will also indicate the calendar year for which you want to migrate 1099 amounts. Note that the first supported year for migrating 1099 information is 2022.

You can also bring over Open Purchase Orders. When we migrate purchase orders, we are looking at the items and the quantities remaining on those items to determine what we will bring over as an open purchase order. If an item is fully received and invoiced that item will not migrate. By bringing over open purchase orders, you do not have to enter outstanding transactions from the purchase order aspect.

5. Inventory items

Inventory is imported with the cost valuation method that is set in GP at the time the migration is run. Location information as well as the quantity on hand for each time is migrated. If serial or lot information is tracked on an item, that information is also migrated.

In the GP Company Migration Configuration page, you can choose to migrate posting accounts on item classes. If you choose this option, posting accounts that are defined on item classes in Dynamics GP will be migrated to Business Central as inventory posting groups. If an item is assigned to an item class in Dynamics GP, the item will be assigned to the corresponding inventory posting group after migrating. If you only want to migrate active items you can choose to exclude inactive items in the GP Company Migration Configuration page. Additional, you can choose if you do not want to migrate discontinued items.

6. Checkbook transaction and master data

You can choose to migrate all checkbooks from Dynamics GP or only active checkbooks. Unreconciled bank transactions will be migrated to Business Central so that you can reconcile your checkbooks after migrating. Any cash receipt that has been posted should also be deposited in GP before migrating, as undeposited receipts will not migrate.

7. GP Historical Snapshot

In the GP Company Migration Configuration page you can select if you want to migrate historical information from GP into Business Central. This data will be visible in list pages found under the corresponding entities and navigating to GP Detail Snapshot. You can indicate if you want to migrate GL detail, Receivables, Payables, Sales Order Processing, Purchase Order Receipts and Inventory transactions. The data is stored in extension tables in Business Central. Data stored in those tables can be used in Power BI reports, Power Apps or other 3rd party reporting tools. The tables containing the GP Historical Snapshot data are as follows:

- Hist. G/L Account
- Hist. Gen. Journal Line
- Hist. Payables Document
- Hist. Receivables Document
- Hist. Sales Trx. Header
- Hist. Sales Trx. Line
- Hist. Purchase Recv. Header
- Hist. Purchase Recv. Line
- Hist. Inventory Trx. Header
- Hist. Inventory Trx. Line

You can limit the about of data migrated in the snapshot by entering the latest year in GP that you want brought over. Enter this year in the Oldest GP Year field in the GP Company Migration Configuration page.