



Walk Before You Run:

A Guide to Successfully Implementing Operational ERP Software on Microsoft Dynamics GP.



Hi, everyone.

I'm Lara, an implementation consultant at SalesPad, and I'm here to walk you through what to expect when implementing a new Operational ERP software. It's a complicated process, and there's a lot to learn and keep track of, but when done properly, the end result will be incredibly rewarding.

I'm sure I don't have to tell you that business software implementation is pretty complicated, to say the least. And sadly, because of this complexity, it has been my experience that many companies can start off on the wrong foot when beginning the implementation process for a new software product such as **SalesPad Desktop**. They have no idea what to expect or how to begin, they haven't even begun to think about what they want their end result to be, and they want everything to be set up yesterday. They don't realize that, when adopting a new technology, the unavoidable **hype cycle** that comes along with that new technology is bound to send them through a gamut of emotions as the implementation process unfolds.

But it doesn't have to be this way! With some careful preparation and thorough communication, implementation can and does run smoothly. Knowing what to expect during implementation will help you avoid potential frustrations, so I've put together this brief guide to walk you through the gist of what is involved in Operational ERP software implementation. This guide is, of course, specific to SalesPad Desktop, but the basic principles will be applicable no matter what major software you are adopting.



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IMPLEMENTATION SPECIALIST



Who are the key players during implementation?

SALESPAD CONSULTANTS

Consultants such as myself are the main point of contact for all technical and process-related assistance during implementation. We are responsible for making sure that software is set up properly and that the customer's specifications are met. SalesPad and other Operational ERP software products are quite complex, but they can greatly improve efficiency and reduce the cost associated with sales order processing. Because of this complexity, it is of utmost importance that the implementation process is not rushed and enough time is devoted to discussing the needs and requirements of the implementation.

SALESPAD PROJECT MANAGERS

SalesPad's project managers are another point of contact for the customer throughout the implementation project. In addition to managing the project's timeline and budget, it is the project manager's job to make sure that everyone involved in the implementation has access to all of the information they need to ensure a smooth execution of the entire process.

MICROSOFT DYNAMICS GP PARTNERS

The involvement of the Microsoft Dynamics GP partner is crucial to successful implementations, as SalesPad's products cannot function without GP. Some GP partners who have been trained on how to properly set up SalesPad and related products prefer to be more involved, and may even take over many of the SalesPad consultant's tasks. In these situations, the SalesPad consultant is only requested for assistance when needed. Other GP partners prefer to allow SalesPad consultants to work on SalesPad's part of the implementation while they themselves focus on the work that must be done within GP. Additionally, a GP partner will often be the party that provides assistance in SQL where needed.

Projects that have had GP in place for several years will not require as much setup as an implementation where GP is also being newly installed. However, it can be advantageous to set both up simultaneously, as this can help both products work together smoothly from the start.



What happens during the implementation process?

The first step towards a successful implementation is crafting a solid plan for how to execute the implementation project. It is important that the project has an outline for what needs to be done when, who will do it, and what sort of time frame is available. Not all tasks can be accomplished immediately, and some will require setup by both the consultant and the customer (you), and maybe even the GP partner. These considerations need to be kept in mind when creating a master timeline for the project.

After the project plan is in place and the consultant is granted access to what they need, they can begin setting up the product(s). If the implementation is for SalesPad Desktop alone, the customer might be able to start using it regularly with their live orders in a relatively short amount of time. For a simple implementation of SalesPad Desktop, there are only a handful of things that we need to review and set up before the customer can “go live”. These include:

- Security setup for users and their assigned security groups
- Global settings for basic functionality
- Workflows to move documents through their intended processes
- Designs for any printed forms needed

Once these tasks are completed, the customer can begin using SalesPad Desktop immediately. Most customers want more than just the basics, however, and so the process becomes more complex and requires more time. But before any of the actual setup can begin, we've got to lay some solid groundwork. That's where you come in.



How should you prepare for implementation?

Preparing for a successful implementation is the most important step. There are many considerations involved, and at times the process may seem tedious, but you'll be glad you were patient during this phase when the actual implementation rolls out smoothly.

SalesPad conducts a **Discovery Call** at the start of the project to allow the consultant and project manager to ask questions that will help with the implementation. These questions will go beyond what was discussed with your sales rep before purchasing SalesPad Desktop. During this call, the expectations of each party are set, setup requirements are discussed, a time frame of completion is proposed, and the customer shares any pertinent details regarding the implementation. If a software customization is in the works (more on that later), it is brought up on the call so that the consultant can prepare for any additional setup and make room in the timeline for the delivery of the custom development.

As consultants, we have several requests of you the customer. These requests are made in order to create safeguards against unforeseen issues that have the potential to derail the entire implementation. Throughout this process, it's important to remember that your consultant is your friend. If we ask for something from you, we're asking for it because we know that it will ultimately help guarantee the success of the project and be a benefit to your business. We and the project managers will do all we can to help you meet these expectations. We want this project to succeed just as much as you do!

Allow me to elaborate on these requests >



What we need from our customers:

We need you to read any documentation that the consultant and/or project manager sends you.

Such documentation is meant to inform you of any requirements or challenges with setup, or to elaborate on topics discussed during the Discovery Call. For instance, if a customer has purchased SalesPad's DataCollection, links to documentation on Internet Information Service (IIS) setup, software and hardware requirements, and the differences between the operating systems will help avoid delays.

We need you to provide a solid test environment.

A test database allows those who have GP already installed to run through the setup and testing of processes in a safe environment while your company continues its daily processes uninterrupted. Those who don't already have GP installed will use the test environment to set up and test SalesPad Desktop while the GP partner focuses on setting up GP and importing live data into the live database.

We need you to be familiar with any hardware you are going to be working with.

Scanners, for instance, come in many models and brands, and they accept different operating systems. SalesPad developers have tested various models and developed the code to work with certain operating systems. We highly encourage that you be fully informed of what hardware you need to purchase before the implementation project begins. This will help avoid delays and/or possible cancellation of the project due to incompatible equipment.

We need you to grant the consultant sufficient access to vital systems.

Consultants need access to the server that SalesPad Desktop is expected to be set up and/or run on, administrator access to SQL Server Management Studio (SSMS) in order to create the connections to the company database, and possibly access to Microsoft Dynamics GP in order to assist with any eConnect requirements, depending on the availability of the GP partner.

We need you to work to understand what SalesPad Desktop is capable of.

This last expectation is probably the most important one. If required functionality is not available in SalesPad Desktop or a related product, it is an opportunity for a software customization. Customization allows the customer to dictate the details of new software functionality for our developers to create. SalesPad was founded on customizations, and we continue to roll certain customizations into our main release builds of SalesPad Desktop for all to benefit from, where possible. If customization is going to be a part of the implementation project, that discussion needs to happen as early in the process as possible.

Implementation is a team effort. We'll do our best to ensure that you have a positive experience that finishes on time — but to do that, we need your help.



Additional product considerations.

During the Discovery Call, discussions on required functionality may lead to the introduction of an additional SalesPad product that could assist you with a need that had not been thought of initially. For instance, many customers like the idea of automating the movement of documents from one batch to another, or transferring documents from one document type to another, or even automating emails to send on a schedule. These functions can be triggered by use of another SalesPad product called **AutomationAgent**, which uses a web service to communicate with SalesPad and the GP company database tables, allowing access to the data required for these activities.

This is only one of many examples of how SalesPad might be able to address a customer request with a different product we already offer. Communication with your implementation consultant or project manager is of utmost importance as you work to determine exactly what you require out of SalesPad, and as we work to provide you with the best solutions.

Up, up, and away!

Once the consultant has set everything up in the test environment, it's time for the big migration. The transition from test to live environment can be very easy if you are migrating to another database in the same SQL instance. This transition is typically done in the final phases of the implementation, but differs with each project based on what has been added and how new the customer is to both GP and SalesPad. But no matter when it happens, it's an exciting day for everyone involved!



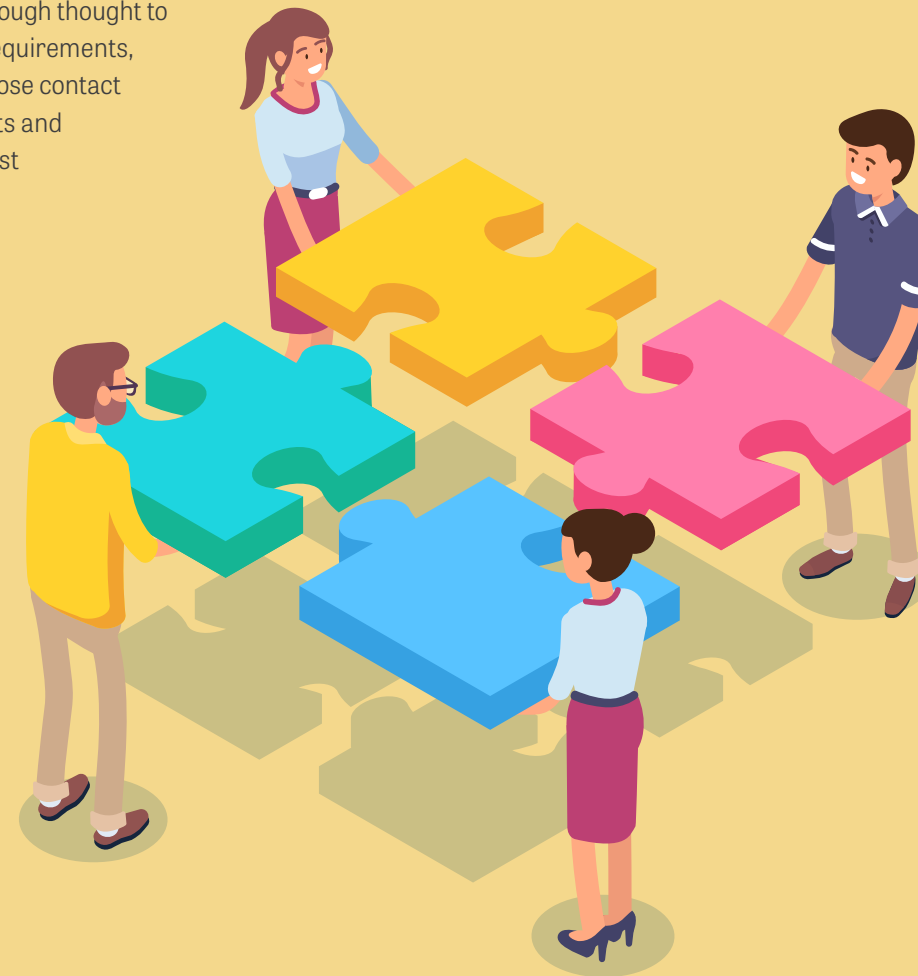
TO RECAP:

- Read system requirements and ask questions.
- Provide access to systems needed for setup (whether in a meeting or by providing the consultant access).
- Get involved and stay involved, be prepared for proposed topics, read documentation sent in reference to the setup of our products, and disclose details that will directly affect the setup of SalesPad (or related products).
- Understand that if assigned tasks aren't completed, it will result in a delay of the project's go-live date (the date when the implementation is considered to be finished).

Final Thoughts.

Customers often ask how long an implementation of SalesPad Desktop takes. This is a difficult question to answer unless you know how complicated the setup will be and become, which is of course hard to determine in the early stages. Once an initial time frame is determined, any changes to what has to be completed will result in the deadline being extended, due to the extra labor required to complete those changes.

A customer's odds of a smooth and timely implementation are greatly increased if they devote thorough thought to the entire process, as well as to their requirements, needs, and desires, and if they keep in close contact with their team at SalesPad. Consultants and project managers are available to assist wherever and whenever possible, but a dedicated and educated customer is what really helps an implementation roll out smoothly. Implementation doesn't have to be painful — and with some forethought, careful planning, and a whole lot of communication, it won't be.



I hope this guide has helped you understand what's involved in implementing an Operational ERP system such as SalesPad Desktop. If you have any further questions about SalesPad Desktop or how the implementation process works, **reach out to us!** We're dedicated to helping you improve your business processes in any way we can (and we're super friendly). We look forward to hearing from you.

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We can handle your inventory management struggles because we've been there. Built from a partnership between a small business owner and a developer, SalesPad knows ERP. It's why we exist, and why more than 15,000 people trust SalesPad to manage their distribution operations.

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Curious about custom software development? Reach out to us! Our team is happy to answer any questions you may have about the process, or even get the ball rolling on a business process review.

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