GARTMAN DMS

YOU NAME IT. WE COVER IT.

Presented by

gartman

for Bravo Services, LLC

DMS IMPLEMENTATION TASK OVERVIEW

I. Initiate Project

- Sign Contract
- Identify key contacts
- Schedule Project Initiation Call
- Conduct Project Initiation Meeting
- Answer Structural Questions

II. Discovery

- Define Components to be Implemented/Utilized
- Map Business Procedures with Department heads
- Obtain/Present Forms
- Discuss Inventory Categories
- Obtain/Compare Main Files (List of Fields/Descriptions)
- Discuss Major Fields, Type, and Length
- Discuss Additional Files That May Need to be Converted
- Obtain Daily Reports
- Set Target Go Live Date
- Propose/Finalize Implementation Plan

III. File Maintenance Review

- Schedule Pre-requisite File Web Training
- Conduct Pre-requisite File Web Training
- Currency Codes
- Country Code
- Company Master
- Location Master
- Division Master
- Family Code Master
- Product Code Master
- Item Class Code
- Item Stocking Code Maintenance
- Chart of Accounts
- Vendor Master File
- Sales Tax Master
- Identify data to be Migrated
- Design Training Plan for File Maintenance

IV.   Data Migration (TBD)

Data migration tasks are defined as part of file maintenance review.

The tasks are prioritized based on training needs so that the data is available for training activities.

V.   File Maintenance Training

File maintenance training is done based on the results of the file maintenance review process.

VI.   DMS Setup

- Customize Forms
- Item Master Additional Setup
- Customer Master Additional Setup
- System Files
- Distribution Files
- General Ledger
- Accounts Receivable
- Accounts Payable
- Pricing
- Executive/Sales
- Claims
- Payroll
- Bank Reconciliation
- Accounts/Contacts
- Vendor Specific Integrations
- UPS WorldShip
- Credit Card Processing
- Job Tracking (Add-On)
- eInvoicing (Add-On)
- Bill of Lading (Add-On)
- EDI (Add-On)

VII. Procedural Training

- Finalize Go Live Date
- Schedule Procedural Training
- Send Procedural Documentation
- Conduct Procedural Training
- Organize List of Open Issues/Requests
- Distributor to Approve Requests/Quotes
- Assign Approved Quotes
- Resolve Open Issues

VIII. GO Live Prep (5-10 business days before Go Live)

- Various Prep for Go Live
- Examples
  - Clean up test data
  - Identify items that will need to be manually entered into DMS i.e. pending transfers or some open orders.
  - Sign off on training completion.
  - Etc.

IX. Go Live (5 business days)

Every Go Live is different. With the way the implementation is structured, you are guaranteed to have a functional system on day 1 of go live.

We have never had a go live that resulted in the inability to ship or invoice goods.