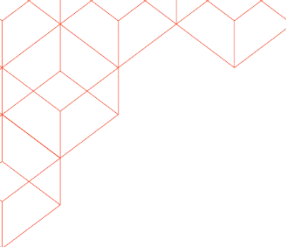




Project conditions and approach

Working together to secure a
successful implementation.

Version 2024



Project approach

Methodology

Boltrics has a fixed working methodology in which the implementation and training of key users come together. After approval of a trajectory, a project plan is drawn up by the Project Manager in which the various steps and phases of the implementation are described and recorded.

Workshop & Simulation I

During the kick-off of a project, a 'Processes' workshop is held in which the consultant of Boltrics, together with the customer, chart the details of the client's work processes determining the intake of the primary processes and confirmation of GAPs. Based on the input of this workshop, a Boltrics consultant will create the business environment in Microsoft Dynamics 365 Business Central. Subsequently, a Simulation I will take place, in which the Boltrics consultant will show the customer how the work processes will fit into the solution. During this session, it will become clear where any additional equipment is needed, according to the included scope. These points are recorded on a central action list on the project site and serve as input for the planned sessions of the consultants and key users.

After mutual approval, the actual implementation process starts. In the project planning, the different steps of the trajectory are mentioned.

Self study

During the implementation process, key users will receive self-study assignments and at predetermined moments. These assignments offer both parties insight into the extent to which the knowledge is gained successfully. By discussing the progress of the self-study together, both the key user and Boltrics know where possible attention points are.

Simulation II & Final determination go-live date

Simulation II takes place at the end of the implementation process, approximately two weeks before the intended go-live date. During this simulation, the key users give a presentation. At Boltrics, we call this the practical test. In this presentation, the key users show by means of some practical examples that the chosen device of the solution offers the best possible support of the business process. During this simulation, all crucial processes for the customer at go-live are discussed.

This measuring moment is meant to track down the last few open points, to test the knowledge of the employees and to determine the final moment of going live. The points mentioned on the project site's central action list will be – if necessary – checked point by point. In this way, we guarantee a joint agreement on these points. Additional points arising from Simulation II will be added to the central action list and serve as input for the key users and consultant in the run-up to go-live. These points need to be resolved before go-live. Or agreed otherwise, provided within the scope of the implementation project.

In the case of a successful Simulation II, the go-live date and the scope of the functionality to be implemented will be definitively determined. In case of realization of confirmed process and functionalities that are needed to go live, the go-live will take place.

Project delivery

Two weeks after go-live, the implementation consultant will transfer the project operationally to the Boltrics support department. All communication regarding the (daily) operational functioning of the system runs through Boltrics Support.

The final project delivery takes place one month after go-live. The implementation project is concluded via the 'project delivery' document and discharge is given to Boltrics. In this document, the (possibly) still open action points related to the scope of the implementation project are included, together with an indicative delivery date per item specified.

Boltrics intends to deliver these action points before or no later than the aforementioned date.

After signing the delivery document you can also use our optimization processes, carried out through the Inside Sales. With a signed transfer document, you are assigned to the Inside Sales (or Account Manager) to guide you further within the Boltrics optimization approach.

With this method, Boltrics can guarantee a controlled go-live.

Projectscope

In the implementation proposal, the various functionalities and modules that are implemented are named including the confirmed conditions. This means that the project scope, or the size of the project, has been determined. Both Boltrics and the client do not deviate from this scope unless mutual agreement and approval of an additional budget proposal have been reached

Assumptions

Assumptions for the preparation of the project plan:

- Implementation of the primary business processes of the customer based on the chosen modules;
- Implementation of one warehouse and/or one transport administration and within one business administration;
- Data conversion from old systems to Boltrics' software;
 - Conversion is carried out by the customer, whereby Boltrics advises and makes templates available;
 - Automatic conversion of master data including, for example, Articles, Customers, Suppliers, Relationships and Contacts;
 - Manual conversion of outstanding orders and other data;
 - Historical data is not converted;
- Core users are available for implementation during the implementation period (see task allocation) two days a week;
- The standard functionality of the Boltrics' software is the starting point for the support of the business processes.

Devision of tasks

Customer:

- Internal project management;
- Follow the required training courses;
- System and application management;
- Training and guiding the end users by trained key users;
- Intensive work with Boltrics' software;
- Performing tests and simulations;
- Preparing and executing the data conversion (static and dynamic data);
- Entering authorizations.

Boltrics:

- External project management;
- Initial installation software, this concerns the Microsoft Dynamics Business Central Cloud environment. Other local applications are performed by the customer or external system administrator. Boltrics provides a work instruction for this;
- Device (parameters and settings) of Boltrics' software;
- Train key users (on the job) based on instructions from a Boltrics consultant;
- Advising both when defining and entering the files;
- Advise on the conversion;
- Checking the work carried out by key users.

Implementation & Training

The implementation budget contains:

- Project management;
- The installation of the software;
- Setting up business processes together with the key users;
- Training the key users;
- Providing input for customer-specific work instructions;
- Support on go-live;
- Aftercare;
- Project delivery one month after going live.

Customer-specific report- or document adjustments are not included in the planning or budget.

When a change in the scope of the automation project occurs, Boltrics will assess in consultation with the customer whether this change has consequences for the implementation budget or -time. If this is the case, then the scope, objectives, and division of tasks associated with the change will be worked out in detail. A budget is then determined.

Support & Updates

The annual maintenance contribution in the case of a cloud environment is a fixed amount per month. Payment of the maintenance amount entitles you to support (helpdesk), updates and new Boltrics releases, as agreed to in the contract. Periodically, a Boltrics update is released containing bug fixes, updates and minor releases from Microsoft. This way you will stay up-to-date automatically. This is all included in the maintenance contract, you will not be charged extra costs. Customer-specific modifications and integrations, as well as changes from (Dutch) customs, are not part of the updates.

For the process coordinating the release of new software versions we refer to <https://learn.boltrics.com/itOperations/general/3PLDynamicsReleaseManagement.html>.

Boltrics provides support exclusively on the software functionality purchased by the customer and implemented by Boltrics.

The added value and savings that this gives you is significant. You can continue to use substantive and technological innovations without significant effort. It is, however, possible that an update impacts existing functionalities in your process. In that case, Support is committed to resolve potential issues from the update.

Maintenance & future expansions

Because developments take place in the branch package, participating companies benefit from the new adjustments. New functionality is created in the following way:

1. User group
The user group wants a new functionality in the form of expansion of the current modules or by adding new modules. These extensions can be financed through a joint investment.
2. Individual company
An individual company can apply for new functionality and is prepared to provide a financial contribution for development. This functionality benefits all companies, by expanding existing modules or by purchasing new modules.
3. Boltrics Professionals
Based on market demands and competitive positioning, Boltrics will invest in strengthening the solution; research into use within cold stores and logistics services in general, possibilities of new versions of Microsoft Dynamics 365 Business Central, technologies such as EDI, and web developments. These extensions benefit all existing users through periodic updates.

Conditions

To successfully complete the process, it is necessary that:

- The management of the customer is completely involved, translating to physical presence during the project; The project manager or designated project responsible(s) of the client is authorized to represent the client in all matters related to the project, including but not limited to communication with Boltrics, making decisions, approving project documentation, and managing project changes. All actions, statements, and decisions made by the project manager or responsible(s) within the scope of the project are deemed to have been made with the full authority of the client. The client accepts the consequences of all actions and decisions of the project manager or responsible(s) as being the actions and decisions of the client itself;
- The management of the customer gives commitment before, during and after the execution of the project;
- Full cooperation of the customer and compliance with the conditions of Boltrics, like technical documentation published on Boltrics Learn;
- The management and key users deal with the project decisively and the work and responsibilities arising from it;
- Boltrics is granted access from the Boltrics office or home workplace to the production environment to provide support;
- TeamViewer is available for remote support;
- In the case of a "Cloud" configuration, a local server is present to install Boltrics' Print Service and, if needed, to place files when using applications this is required for.

The following items/services are not part of the standard proposal as issued by Boltrics:

- Any necessary hardware;
- Integrations with systems of third parties insofar as not mentioned in the quotation;
- Any customer-specific report adjustments;
- Possibly desired customer-specific calculation methods, for example for price calculation or storage and pick strategies;
- Passwords and configuration knowledge are required for configuring/resetting scanners. For this, the supplier of the equipment can provide support.
- Support with the design of additional scanning processes on top of the standard delivered processes.