Q84 Digital

MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

ERP Readiness Checklist

A practical planning guide for distributors, manufacturers and inventory-driven businesses considering Business Central. Use it to find gaps, get your team aligned and prepare for a productive ERP assessment.

Senior-led implementation **15+ years** of Microsoft Dynamics experience **Microsoft partner**

Company _____ **Date** _____

Prepared by _____ **Target go-live** _____

How to use this checklist

Fill in this PDF on screen or print it. Tick **Yes**, **Partly** or **No** for each question, and use the notes column for examples, owners or open questions. You don't need every answer before talking to an ERP consultant. The goal is to make gaps visible.

Yes	**Partly**	**No**
Ready or documented	Needs clarification	Gap or decision needed

01 Business goals and project ownership

Readiness question	Yes	Partly	No	Notes / owner
1.1 We can explain why our current systems or processes need to change.	☐	☐	☐	
1.2 We have defined the business outcomes we expect, such as faster order processing, more accurate inventory or better financial visibility.	☐	☐	☐	
1.3 An executive sponsor has been named and can make decisions quickly.	☐	☐	☐	
1.4 A day-to-day project owner is available to coordinate people, decisions and deadlines.	☐	☐	☐	
1.5 Finance, sales, purchasing, warehouse, operations and IT are all represented.	☐	☐	☐	
1.6 We have agreed how we will measure project success.	☐	☐	☐	

02 Current systems and processes

Readiness question	Yes	Partly	No	Notes / owner
2.1 We have listed the systems we use for accounting, inventory, order management, shipping, ecommerce and production.	☐	☐	☐	
2.2 We know which systems will be replaced, kept or integrated.	☐	☐	☐	
2.3 We have mapped our core process from quote or order through shipment and invoicing.	☐	☐	☐	
2.4 We know where people rely on spreadsheets, email or re-keying data.	☐	☐	☐	
2.5 We have identified process differences between locations, business units or companies.	☐	☐	☐	
2.6 We have listed our biggest pain points and what they cost the business.	☐	☐	☐	

03 Finance and reporting

Readiness question	Yes	Partly	No	Notes / owner
3.1 Our chart of accounts and financial dimensions (if used) are understood and documented.	☐	☐	☐	
3.2 We know our reporting needs, including management, tax and operational reports.	☐	☐	☐	
3.3 We have identified approval limits, workflows and segregation-of-duties requirements.	☐	☐	☐	
3.4 We understand our payables, receivables, cash, banking and month-end close processes.	☐	☐	☐	
3.5 We have identified currencies, sales tax jurisdictions and intercompany requirements.	☐	☐	☐	
3.6 Finance has decided which historical data must be migrated or kept for reference.	☐	☐	☐	

04 Inventory, purchasing and sales

Readiness question	Yes	Partly	No	Notes / owner
4.1 We have a reliable item list with agreed item numbers, descriptions and units of measure.	☐	☐	☐	
4.2 We understand our costing, replenishment, safety stock and inventory adjustment processes.	☐	☐	☐	
4.3 We know how purchase orders, receiving, vendor returns and supplier pricing are managed.	☐	☐	☐	
4.4 We have documented sales order entry, pricing, discounts, credit checks and returns.	☐	☐	☐	
4.5 We know which products need lot, serial, expiration date or other tracking.	☐	☐	☐	
4.6 We understand inventory transfers between warehouses, locations or companies.	☐	☐	☐	

05 Warehouse and fulfillment

Readiness question	Yes	Partly	No	Notes / owner
5.1 We have documented receiving, put-away, replenishment, picking, packing, shipping and returns.	☐	☐	☐	
5.2 We know whether basic inventory features are enough or we need advanced warehouse management.	☐	☐	☐	
5.3 We have identified barcode scanning, mobile device, label printing and printer requirements.	☐	☐	☐	
5.4 We understand our bin structure, zones and put-away and picking rules, where they apply.	☐	☐	☐	
5.5 We have identified carrier, parcel, freight, 3PL and shipping platform integrations.	☐	☐	☐	
5.6 We have documented special handling such as FEFO, catch weight or quality holds.	☐	☐	☐	

06 Manufacturing and service

Readiness question	Yes	Partly	No	Notes / owner
6.1 We know whether we need bills of materials, routings, production orders or capacity planning.	☐	☐	☐	
6.2 We understand how production consumption, output, scrap and subcontracting are recorded.	☐	☐	☐	
6.3 We have identified quality inspection, nonconformance and traceability requirements.	☐	☐	☐	
6.4 We know whether service orders, warranties, repairs or field service are in scope.	☐	☐	☐	
6.5 We have separated must-have day-one requirements from later-phase improvements.	☐	☐	☐	

07 Data, integrations and technology

Readiness question	Yes	Partly	No	Notes / owner
7.1 We know the source, owner and quality of customer, vendor, item and opening balance data.	☐	☐	☐	
7.2 We have a plan to clean up duplicates, incomplete records and inconsistent units or codes.	☐	☐	☐	
7.3 We have identified the integrations we need, such as ecommerce, EDI, CRM, payroll, banking or shipping.	☐	☐	☐	
7.4 We know who owns each integration and whether it uses APIs, middleware or file exchange.	☐	☐	☐	
7.5 We have identified user roles, permissions, security and approval requirements.	☐	☐	☐	
7.6 We have considered reporting, dashboards, document storage, backups and business continuity.	☐	☐	☐	

08 People, training and change management

Readiness question	Yes	Partly	No	Notes / owner
8.1 Department leads and key users can take part in workshops and testing.	☐	☐	☐	
8.2 We know who will test each process and who signs off the results.	☐	☐	☐	
8.3 We have a plan to train people based on their roles and daily work.	☐	☐	☐	
8.4 We have considered how procedures, job responsibilities and controls will change.	☐	☐	☐	
8.5 We have a plan to keep affected employees informed.	☐	☐	☐	

09 Budget, timeline and scope

Readiness question	Yes	Partly	No	Notes / owner
9.1 We have an approved budget range for software, implementation, integrations, data migration and training.	☐	☐	☐	
9.2 We understand that licenses, implementation services and ongoing support are separate costs.	☐	☐	☐	
9.3 We have a realistic target date that allows for busy seasons and year-end.	☐	☐	☐	
9.4 We have ranked must-have requirements above nice-to-have improvements.	☐	☐	☐	
9.5 We have discussed a phased rollout versus a single go-live.	☐	☐	☐	
9.6 We have planned support and system ownership after go-live.	☐	☐	☐	

10 Readiness summary

Count your Yes answers for each area. Lots of No or Partly answers doesn't mean you aren't ready. It shows the decisions and preparation to include in discovery and project planning.

Area	Yes answers	Ready	Needs work	Owner / next action
Goals & ownership	____ / 6	☐	☐	
Systems & processes	____ / 6	☐	☐	
Finance & reporting	____ / 6	☐	☐	
Inventory, purchasing & sales	____ / 6	☐	☐	
Warehouse & fulfillment	____ / 6	☐	☐	
Manufacturing & service	____ / 5	☐	☐	
Data & integrations	____ / 6	☐	☐	
People & change	____ / 5	☐	☐	
Budget & scope	____ / 6	☐	☐	

Top five questions to resolve before choosing an ERP partner

1.
2.
3.
4.
5.

What should happen next?

Bring this checklist to your ERP discovery conversation. A good assessment confirms your processes, finds the gaps between standard Business Central and your requirements, clarifies integrations and data migration, and sets a realistic scope.

Ready to assess your Business Central project?

Q84 Digital helps distributors and manufacturers plan, implement and improve Business Central, with practical focus on inventory, warehouse operations and integrations. Bring your completed checklist to a free, no-obligation call.

Book a free ERP assessment

q84digital.com · hello@q84digital.com

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