AMP D365

Data Migration FAQ

As part of the D365 system upgrade not all customer records will be migrated. This document outlines the different use cases in which data will be migrated and the types of customer record data that will be included. Customer records that are not migrated can be found in the AX Legacy Viewer/Workbench.

Frequently Asked Questions

What customer records are being migrated to D365?

We will be migrating the data for customer records that meet the following criteria:

- Records that were in an "Open" status on April 25, 2021 through current
- Residential Customers with activity since November 2020
- Commercial Customers with activity since March 2020

What parts of the customer record are included with data migration?

- Order documents (the PDF)
- Open Invoices (the PDF)
- Transaction History for open transactions
- Customer information (address, phone, email)
- Any Order that that is active or has a FPU after April 25, 2021, including the order detail, service lines, dates, and pricing
- Customer Notes History

What type of attachments will be included with the migrated customer records?

- Sales Order Attachments – documents and notes
- Customer Orders/Projects Attachments – documents and notes associated with orders in an "Open" status at time of system upgrade
- Customers – documents and notes
- Account Receivables Invoices – project invoices associated to open AR invoices
- Commercial Invoice Statements – invoice statements

Will all attachments be included for all migrated customer records?

No, the attachments that are included will depend on the type of customer record, and the time frame of last activity.

PODS

Data Migration FAQ

Use Cases

If a customer record has an open order at time of cutover, the following parts of the customer record will be migrated:

- Order documents (the PDF
- Open Invoices (the PDF)
- Customer information (address, phone, email)
- Order History
- Order Detail, including service lines, dates, and pricing
- Customer Notes History activity spanning 6 months preceding cutover on January 28, 2022, for Residential customers and 14 months for Commercial customers

If a customer record has an open transaction, but not an open order, at time of cutover, the following parts of the customer record will be migrated:

- Order documents (the PDF)
- Open Invoices (the PDF)
- Customer information (address, phone, email)
- Order History
- Order Detail, including service lines, dates, and pricing
- Customer Notes History activity spanning 6 months preceding cutover on January 28, 2022, for Residential customers and 14 months for Commercial customers

If a customer order was completed (FPU) between July 28, 2021, and January 28, 2022, the following parts of the customer records will be migrated:

- Order documents (the PDF)
- Open Invoices (the PDF
- Customer information (address, phone, email)
- Order History
- Order Detail, including service lines, dates, and pricing
- Customer Notes History



Use Cases (continued)

If a customer order was completed (FPU) between April 25, 2021, and July 27, 2021, the following parts of the customer record will be migrated:

- Order documents (the PDF)
- Open Invoices (the PDF
- Customer information (address, phone, email)
- Order History
- Order Detail, including service lines, dates, and pricing
- Customer Notes History
    - No for Residential
    - Yes for Commercial

If a customer order was completed (FPU) between October 25, 2020, and April 24, 2021, the following parts of the customer record will be migrated:

- Open Invoices (the PDF)
- Customer information (address, phone, email)

If a customer order was completed (FPU) prior to October 25, 2020, the customer record and order information will be available using the AX Legacy Viewer.