

# **Service Description for the D365 F&SCM Solution Maintenance**

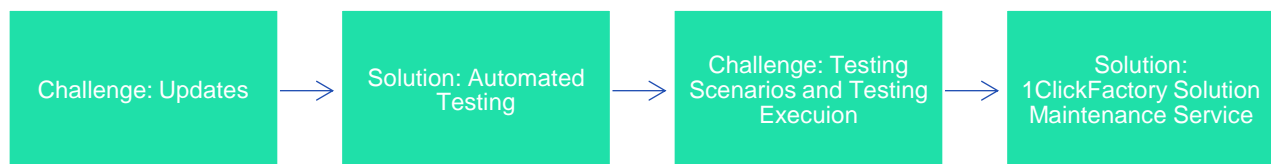


## Introduction

After you deploy your Customer on Dynamics 365 Finance and Supply Chain Management, they are affected by the continuous deployment lifecycle. Approximately every 6 weeks, automatic platform updates are being rolled out. With each roll-out, User Acceptance Testing should be performed in the sandbox environment. Taking a risk and opting out from testing, even that one time, is not a solution. A one-time opt-out could result in an unidentified error appearing in the production environment after an automatic update damaging your customer's business and costing you their trust as their Microsoft Partner.

## Context

Although the One Version service updates provide businesses many advantages, they also can pose challenges for customers. However, we are ready to overcome every challenge that may be encountered:



Challenge: Updates	Solution: Automated Testing
<ul style="list-style-type: none"> <li>Updates bring changes to the standard functionality which results in customer business processes being changed. Users are not ready for these changes and they can disrupt the daily operations</li> <li>Installing an update can result in a code conflict that needs to be fixed right away</li> <li>Updates affect customer modifications that exist in the system which can result in some modifications working differently or not working at all</li> </ul>	<p>It is crucial to perform testing to solve these challenges. Testing can be either manual or automated. 1ClickFactory prefers performing automated testing as it is:</p> <ul style="list-style-type: none"> <li>A recommended approach by Microsoft</li> <li>Less resource-heavy and more reliable</li> <li>Less time spent on testing after each system update</li> <li>Lower recurring costs</li> </ul>
Challenge: Testing Scenarios and Testing Execution	Solution: 1ClickFactory Solution Maintenance Service
<ul style="list-style-type: none"> <li>Testing scenarios must be documented and automated tests need to be created and maintained – significant effort and extensive knowledge are needed</li> <li>Automated testing executions must be set up properly – there are gray zones where set up steps are not aligned with</li> </ul>	<p>1ClickFactory's expertise coupled with close support from Microsoft helps both Dynamics Partners and customers to identify what's missing and what's needed to set up automated testing.</p>

<p>documentation and the setup is generally challenging</p> <ul style="list-style-type: none"> <li>Resources are still required to perform each update testing iteration: <ul style="list-style-type: none"> <li>Data setup preparation is needed</li> <li>Specific users with solution knowledge are needed</li> <li>Some manual testing still needs to be performed</li> </ul> </li> </ul>	<p>Solution Maintenance service is a service package that includes three phases that should be followed to have the customer's solution fully maintained and supported by 1ClickFactory.</p>
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## What value does the Solution Maintenance service provide?

Every customer who has deployed their system on the Microsoft Dynamics 365 Finance and Supply Chain Management system must perform 8 yearly Microsoft updates that cannot be avoided. 1ClickFactory's approach is the same as Microsoft's – to keep the system secure, reduce financial risks, and have all the updates working properly, therefore, every update should be tested. However, testing requires time, support, knowledge, and a dedicated team.

1ClickFactory's Solution Maintenance service can make your and your customer's life easier. With this service and our expertise, we aim to reduce any potential risks after having the required updates as we are going to create test cases for each update, perform the testing and maintain the solution afterward. We aim to make sure that the customer feels secure and has the system functioning properly because each update is well tested and ready to use.

## To Whom Does the Service Apply?

The Solution Maintenance service is for the newly implemented Microsoft Dynamics 365 Finance and Supply Chain Management, all ISV solutions, and after migration/re-implementation projects. If the solution is not the newest Dynamics 365 Finance and Supply Chain Management version, 1ClickFactory can help with an upgrade. Start with the BestPath Assessment to receive the free-of-charge initial analysis. [Click here](#) to request the service.

### Important!

Solution Maintenance is provided through Microsoft Dynamics Partners only (Partner can invite their customer to all service-related activities). If you are a Dynamics 365 Finance and Supply Chain Management end-customer, please contact us by e-mail at [service@1clickfactory.com](mailto:service@1clickfactory.com).

## Supported Versions

The Solution Maintenance can assess customers that use Dynamics 365 Finance and Supply Chain Management.

## Service Delivery Process

Solution Maintenance service consists of the following phases:



We will broadly introduce you to each phase by providing all the relevant information related to the process, prerequisites, deliverables that will help Partner to be fully prepared before the Solution Maintenance project execution.

### 1. Service Request



To request the Solution Maintenance service, the Partner should be aware of the following steps:

<b>Initiation</b>	<p>Partner initiates the conversation about the Solution Maintenance service through the <a href="https://1clickfactory.com">1ClickFactory website</a> or contacts 1ClickFactory via email <a href="mailto:service@1clickfactory.com">service@1clickfactory.com</a>.</p> <p>Partner's contact information for 1ClickFactory to be able to reach out and discuss further details on how to proceed with the Testing Readiness Assessment.</p>
<b>Service Briefing</b>	<ul style="list-style-type: none"> <li>1ClickFactory sets up a 45 min call with the Partner (Partner can invite the Customer to join the meeting too) to review and discuss the overall service delivery process, prerequisites, and deliverables.</li> <li>Parties may agree on the specific date to proceed with the Testing Readiness Assessment scoping session.</li> </ul>
<b>Service Briefing</b>	

### 2. Testing Readiness Assessment



After requesting the Solution Maintenance service, you will be able to start with a Testing Readiness Assessment that consists of:

<b>Testing Readiness Assessment Initiation</b>	<ul style="list-style-type: none"> <li>Parties mutually agree on the timeline to proceed with the Testing Readiness Assessment scoping session (providing information for the preparation, workshop date, agenda, and participants via e-mail).</li> </ul>
<b>Preparation for the Testing Readiness Assessment Scoping Session</b>	<ul style="list-style-type: none"> <li>Partner provides the documentation about the modifications in the current system to 1ClickFactory (i.e Functional Design Documents of modifications found in the customer's solution).</li> <li>1ClickFactory reviews the provided documentation, identifies the critical testing areas and prepares to bring these areas to the readiness assessment session.</li> <li>Partner prepares to present the solution extensively and perform knowledge transfer of how the system is used daily and what modifications are found during the Testing Readiness Assessment Scoping Session (consultants' or key users' input might be needed).</li> </ul>
<b>Testing Readiness Assessment Scoping Session (~4 hrs)</b>	<ul style="list-style-type: none"> <li>Partner and 1ClickFactory meet online to identify the scope of Partner's Enrollment to Solution Maintenance Subscription.</li> <li>Partner presents: <ul style="list-style-type: none"> <li>High-level solution overview</li> <li>Main business process overview</li> <li>Overview of the key functionalities used in the system</li> <li>Key modifications presentation</li> <li>Key integrations presentation</li> <li>Testing expectations</li> <li>Current update testing procedures</li> <li>On-going development overview</li> </ul> </li> <li>1ClickFactory presents the automated update testing best practices, insights, and recommendations.</li> <li>Modifications are reviewed together with 1ClickFactory suggestions for the key testing areas.</li> <li>Parties mutually identify and document: <ul style="list-style-type: none"> <li>The list of modifications and business process areas within the scope of the solution's Partner's Enrollment to Solution Maintenance Subscription.</li> <li>The automated testing readiness per each of the areas and gaps.</li> </ul> </li> </ul>
	<ul style="list-style-type: none"> <li>1ClickFactory documents the Testing Readiness Assessment findings and gaps to get the solution fully prepared for the automated testing: <ul style="list-style-type: none"> <li>Which modifications to test (list and total)?</li> </ul> </li> </ul>

<b>Proposal for Partner's Enrollment to Subscription and the Solution Maintenance</b>	<ul style="list-style-type: none"> <li>○ Which functional areas to test (list and total)?</li> <li>○ Number of potential test cases</li> <li>○ Will the test case be manual or automated?</li> </ul> <ul style="list-style-type: none"> <li>• 1ClickFactory provides a commercial proposal for the <b>Partner's Enrollment to Subscription</b>. The proposal foresees: <ul style="list-style-type: none"> <li>○ The fixed development scope (a modification and functional area list, number of potential test cases, automated/manual scenarios, test case documentation).</li> <li>○ A fixed price for the development service.</li> </ul> <p><i><u>Note:</u> Partner can decide to perform the fixed development scope themselves (test case development and testing scenario document creation). In such a case, the Partner's Enrollment to Subscription proposal will only include the final reviewal, testing, and acceptance of the provided test cases.</i></p> </li> <li>• 1ClickFactory provides a commercial proposal for the <b>Solution Maintenance</b> subscription service. A monthly subscription-based proposal is prepared for ongoing Solution Maintenance service that includes: <ul style="list-style-type: none"> <li>○ A fixed monthly fee for running, maintaining and investigating the above test cases.</li> <li>○ How many man-days are allocated for fixed implementation to each Microsoft One Version service update.</li> </ul> </li> </ul>
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### 3. Partner's Enrollment to Subscription



The following provides the process of the Enrollment to Subscription:

<b>Partner's Enrollment to Subscription Agreement</b>	<p>1ClickFactory begins with the Partner's Enrollment to Subscription service delivery after all Parties enter into the Software services delivery agreement for the Partner's Enrollment to Subscription service.</p> <p><u>Note:</u> Please find the Partner's Enrollment to Subscription service details on the next steps.</p>
<b>Project Infrastructure Set Up</b>	<ul style="list-style-type: none"> <li>• Partner and Customer provide the access to 1ClickFactory representatives for LCS and DevOps projects platforms. Partner and Customer may invite 1ClickFactory users or Customer can create new users by themselves on their Azure Active Directory (with a Basic + Test plan or Visual Studio Enterprise subscription license in Azure Dev Ops).</li> </ul>

<b>Project Infrastructure Set Up</b>	<ul style="list-style-type: none"> <li>• Partner and Customer deploy the separate testing environment with the Customer's code and data (later referred to the testing environment and preferably on the customer's LCS tenant).</li> <li>• 1ClickFactory creates a new BPM library to store the Task Recordings for the automated tests.</li> <li>• 1ClickFactory connects the testing environment to the customer's Azure DevOps Development branch to be able to get the newest Customer code.</li> </ul>
<b>Testing Scenarios Development</b>	<ul style="list-style-type: none"> <li>• 1ClickFactory, based on the agreed test cases, develops the testing scenario documents that define each test case's step-by-step testing scenario.</li> <li>• Partner can provide or develop the test cases and testing scenarios documents themselves. In this case, 1ClickFactory will perform only the review, testing, and approval of the provided test cases and documents.</li> <li>• Scenarios are documented for test cases that will be performed automatically and manually. Some manual test cases scenarios include: <ul style="list-style-type: none"> <li>◦ Static reports (SSRS, Excel, Electronic reporting)</li> <li>◦ Workflow scenarios</li> <li>◦ DMF Import/Export scenarios</li> <li>◦ Integration scenarios</li> </ul> </li> <li>• 1ClickFactory defines the test case input data and adds it to the testing scenarios.</li> <li>• Partner is expected to identify a contact person for the natural clarifying questions during the Testing Scenario Development (which test data to use, day-to-day clarifications, etc.)</li> </ul>
<b>Testing Scenarios Approval</b>	<ul style="list-style-type: none"> <li>• 1ClickFactory presents the created testing scenarios with the selected input data (~2 hours online call).</li> <li>• Customer/Partner reviews the step-by-step testing scenarios and provides feedback or approval. Key things to consider in each testing scenario: <ul style="list-style-type: none"> <li>◦ Do the detailed steps test the modification/business functionality correctly?</li> <li>◦ Is the selected test data correct?</li> <li>◦ Customer/Partner would have to dedicate up to 15 minutes per every testing scenario review.</li> </ul> </li> <li>• 1ClickFactory makes changes to the testing scenarios documents based on the Customer/Partner feedback and presents the updated testing scenarios for the Partner's feedback.</li> </ul>

<b>Testing Scenarios Approval</b>	<ul style="list-style-type: none"> <li>Key user or functional consultant approval is required for the newly created test cases.</li> </ul>
<b>Partner's Enrollment to Subscription</b>	<ul style="list-style-type: none"> <li>1ClickFactory develops and delivers the automated test case files. Automated test cases are created using the Microsoft RSAT tool that is based on the agreed testing scenarios documents.</li> <li>1ClickFactory defines the manual test cases for testing scenarios that will be performed manually. Manual test cases are created directly in Azure DevOps with the attached testing scenario document.</li> </ul> <p><u>Result:</u> The solution is ready for automatic solution testing as the automated and manual test cases are defined.</p>

## 4. Solution Maintenance



Please find the following service routine for each Microsoft Dynamics 365 Finance and Supply Chain Management update:

<b>Solution Maintenance Service Agreement</b>	<p>1ClickFactory begins with the Solution Maintenance Subscription service delivery after all Parties enter into the Solution Maintenance Subscription Service Delivery agreement.</p> <p><u>Note:</u> Every timeline listed here is preliminary and provided only for the illustration purposes, but Partner and 1ClickFactory would agree on the concrete ones in the agreement.</p>
<b>Preparation</b>	<ul style="list-style-type: none"> <li><b>Preparation of testing environment</b> is performed <b>within 5 (five) business days</b> after the official One Version update release.</li> <li>1ClickFactory configures the testing environment and updates with the newest One Version service update (1 of the 8 yearly D365 F&amp;SCM One Version updates) and customer code (installs Microsoft and customer modifications received from the customer's source control to the testing environment).</li> <li>1ClickFactory updates the Test Cases from the Test Case list with new testing data that is defined in the Testing Scenarios documents.</li> </ul>
<b>Testing</b>	<ul style="list-style-type: none"> <li><b>Testing and reporting of testing results</b> are performed <b>within 10 (ten) business days</b> after the official One Version update release.</li> <li>1ClickFactory runs the Automated Test Cases established in the Test Case list. Test results are visible on Azure DevOps.</li> </ul>

<b>Testing</b>	<ul style="list-style-type: none"> <li>1ClickFactory executes the Manual Test Cases established in the Test Case list. Test results are visible on Azure DevOps.</li> </ul> <p>Please note that the scope of the testing phase is limited to Test Cases on the Test Case List only.</p>
<b>Incident Investigation</b>	<p>Please note that the scope of the Incident Investigation phase is limited to the issues discovered during the testing step.</p> <p>During Incident Investigation the failed Test Case is broken down into smaller steps and the scenario is repeated manually. Afterward, the following steps are performed:</p> <p><u>Reasons for the failed test cases:</u></p> <ul style="list-style-type: none"> <li>A different data sample is chosen to verify if it's a data issue or not.</li> <li>The steps are debugged using developer tools and the underlying code is investigated.</li> <li>The code is compared with the previous version of the Microsoft service update.</li> <li>The code is compared with any new developments that took place before the current testing iteration.</li> <li>The testing engineer provides input about the issue: what is the possible solution to solve the incident, whether a code fix is required, what is the scope of the task, and if 1ClickFactory can deliver it.</li> </ul> <p>1ClickFactory performs Test Cases maintenance in case of errors in Test Cases.</p>
<b>Reporting</b>	<p>A support incident will be raised with the initial findings and solutions (if any) to the Partner. 1ClickFactory provides testing results report ("Testing Iteration Report") to the Customer and Partner via email:</p> <ul style="list-style-type: none"> <li>List of Test Cases run.</li> <li>List of passed Test Cases.</li> <li>List of failed Test Cases.</li> <li>Incident investigation of failed Test Cases:             <ol style="list-style-type: none"> <li>Results</li> <li>Recommendations:                 <ul style="list-style-type: none"> <li>Fix suggestion and preliminary effort to implement fix suggestion.</li> <li>Highlight that there is a need for the design change and 1ClickFactory initiated the dialog on the following steps to come up with a design.</li> <li><u>Note:</u> Partner's functional consultant will need to approve the intended design change or propose a better design.</li> </ul> </li> </ol> </li> <li>General findings and recommendations.</li> </ul>

<b>Collection of Partner's Response</b>	<p>The Partner responds how to proceed with failed Test Cases (ones reported during a Reporting phase). The Partner may:</p> <ol style="list-style-type: none"> <li>1. Confirm that 1ClickFactory can proceed and implement design 1ClickFactory suggested in the Report,</li> <li>2. Provide better/new design for 1ClickFactory to implement or indicate when the new design will be provided.</li> <li>3. Provide feedback. Please note that in case of no feedback from the Partner <b>within 3 (three) business days</b> after the receipt of the Testing Iteration Report, 1ClickFactory shall include no fix into the Delivery phase, therefore, the business process could break, and it would be out of scope for service warranty.</li> </ol>
<b>Fixing</b>	<p>The fixing starts with the Partner's approval to implement fixes.</p> <p>Parties mutually agree on the dedicated fixing effort that 1ClickFactory will allocate and document within the Solution Maintenance agreement. Usually dedicated fixing effort is 5 (five) man-days per one update.</p> <p>In case any fixes will be needed outside of this fixing iteration, 1ClickFactory can dedicate additional time for the fixing under the T&amp;M basis.</p> <p><u>Timeline of:</u></p> <ul style="list-style-type: none"> <li>• <b>Commencement of fixing provided under Fixing Efforts:</b> within 2 (two) business days after the Partner's approval to implement fixes.</li> <li>• <b>Continue fixing outside of Fixing Efforts:</b> upon mutual agreement by the Parties.</li> </ul>
<b>Delivery</b>	<p>1ClickFactory delivers the code fix via .axpp file (Visual Studio project export), or direct addition to the Azure DevOps).</p> <p>1ClickFactory sends the delivery report and the timesheet with an actual fixing effort via e-mail.</p> <p>Involvement from Partner will be needed for code fix validation and testing, for applying the update to the Tier2+ Sandbox environment, performing final update testing, validation, and applying an update to the Production environment.</p> <p><i><u>Note:</u> Parties may agree for the 1ClickFactory to perform these activities: applying the update to the Tier2+ Sandbox environment, performing final update testing, validation, and applying an update to the Production environment and document the performance in the Solution Maintenance agreement.</i></p>

With the Solution Maintenance subscription, 1ClickFactory ensures that if:

- **Tested Cases, during the Testing phase, have passed:** After the service update is applied to Tier 2+ Sandbox and Production environments passed Test Cases' Testing Scenarios will be supported and function as before the update.
- **Tested Cases have failed, Partner approved fixes, 1ClickFactory performed Fixing and Delivery activities:** After the service update is applied to Tier 2+ Sandbox and Production environments passed Test Cases' Testing Scenarios will be supported and function as before the update.

## Pricing

Service phase	Value	Price
<b>Testing Readiness Assessment</b>	The testing scope is defined for maintaining solution update support.	Free (limited time offer).
<b>Partner's Enrollment to Subscription</b>	The solution is ready for recurring manual and automated testing.	Fixed price proposal provided after scoping session. Price is directly related to how heavy the solution is modified and how many test cases will need to be created.
<b>Solution Maintenance Subscription</b>	<ul style="list-style-type: none"> <li>The solution is tested out for each Microsoft service update in the defined test cases.</li> <li>1ClickFactory presents the results and performs an investigation.</li> <li>If needed, 1ClickFactory provides code fixes.</li> <li>Microsoft service update is ready for implementation in Sandbox and Production environments after being fully tested.</li> </ul>	<p>The Solution Maintenance subscription consists of a fixed monthly fee and an hourly rate for the T&amp;M engagements such as fixes that exceed dedicated fixing efforts (usually 5 man-days per update).</p> <p>The fixed monthly fee for the Solution Maintenance subscription is defined per each solution and the number of test cases, provided after the Testing Readiness Assessment workshop.</p> <p>The Solution Maintenance monthly subscription price may be reviewed in such cases:</p> <ul style="list-style-type: none"> <li>If there is a change in the number of test cases.</li> <li>If Microsoft changes One Version update releases or if there are cardinal changes within the RSAT framework. Price change notification would be provided with 3 months' notice.</li> </ul> <p>The subscription fee will be invoiced monthly upfront on the first day of each month with 30 days payment term.</p> <p><b>Note:</b> Partner can terminate the Solution Maintenance subscription by giving written notice to 1ClickFactory. In such an event, the subscription will not renew</p>

and cease at the end of the current subscription term.

## Out of Scope

With the Solution Maintenance service, 1ClickFactory guarantees to solve all the issues identified by the test cases. However, there are the following actions that shall not be included in the Solution Maintenance service and provided by 1ClickFactory. In such cases, 1ClickFactory can offer the additional services to cover these potential issues. 1ClickFactory can cover the remaining unused hours under Fixing Efforts with these activities when agreed with Partner before the start of Commencement of fixing:

Not included in the service	What we offer
Discovery, Fixing, and Investigation of issues above Fixing Efforts.	1ClickFactory can offer additional services on a T&M basis to discover, fix and investigate issues above Fixing Efforts.
Reviewing and/or fixing of new Test Cases created by the Partner or Customer.	1ClickFactory can review and/or fix the new Test Cases created by Partner or Customer by offering additional services on a T&M basis (can be performed under Fixing Efforts).
Running Automated and Manual test cases that were not established in the Test Cases list.	New Test Cases can be reviewed and onboarded under T&M additional services (can be performed under Fixing Efforts).
Notify the Partner and Customer with the new functionalities available in the upcoming updates.	1ClickFactory can notify Partner (if they require) with the newly released product functionality based on the T&M additional services (can be performed under Fixing Efforts).
New Test Cases development.	1ClickFactory can offer additional services under T&M based on the number of new test cases (can be performed under Fixing Efforts).
Performing additional Testing (after the Testing Iteration is completed) in key functional areas.	1ClickFactory can offer additional services under T&M for the agreed testing scenarios (can be performed under Fixing Efforts).
Gather new deployment packages for Customer code and combine it with Service Updates and/or Quality updates.	Parties may agree for the 1ClickFactory to perform these activities in addition to the Solution Maintenance service (added to the Subscription scope).
Applying the deployment package/Service update to the Tier2+ Sandbox environment, performing the	Parties may agree for the 1ClickFactory to perform these activities in addition to the Solution

final update testing, validation, and applying update to the Production environment.	Maintenance service (added to the Subscription scope).
Perform communication with Microsoft (Using LCS Support system) related to technical or functional issues that are raised in the standard solution.	Parties may agree for the 1ClickFactory to perform these activities in addition to the Solution Maintenance service (added to the Subscription scope).
Seek out, apply and test Quality updates and hotfixes that are released after the initial Testing Iteration was performed.	Parties may agree for the 1ClickFactory to perform these activities in addition to the Solution Maintenance service (added to the Subscription scope).
Investigate the newly released Service Update and/or Quality update. Identify key changed areas that may interfere with Customer modifications and notify Partner and Customer.	Parties may agree for the 1ClickFactory to perform these activities in addition to the Solution Maintenance service (added to the Subscription scope).
Other Tier-1 environment (Dev/Test/Build) updates after the Production environment is updated.	Parties may agree for the 1ClickFactory to perform these activities in addition to the Solution Maintenance service (added to the Subscription scope).

## Related Services

1ClickFactory offers additional services to meet the needs of Dynamics Partners which may arise in relation to the Solution Maintenance service:

### Development services

- D365 F&SCM Development for end-customer solutions.
- D365 F&SCM Apps Development for AppSource.
- D365 F&SCM Development services for the Solution Maintenance (T&M):
  - Fixing above Fixing Efforts.
  - New Test Cases development, when the Partner sees a gap or a need for a new testing scenario and requests 1ClickFactory to create a new Test Case accordingly.
  - Test Case Onboarding.
  - Any other out-of-scope work.

### Upgrade service

If you have customers who are still running the Dynamics AX version, entrust their [solution migration](#) to the newest Dynamics 365 Finance&Supply Chain Management to the highly experienced 1ClickFactory specialists, who stay current on the latest technologies, and get the project delivered in scope and on time.

## About 1ClickFactory

1ClickFactory is a Microsoft-appointed Upgrade Service Center that works exclusively through Microsoft Partners. Its innovative upgrade concept and focused expertise in implementing over fifty successful AX upgrade projects for Dynamics Partners around the world have enabled this company to achieve high efficiencies in deploying upgrades. Please visit [www.1clickfactory.com](http://www.1clickfactory.com) for more information about 1ClickFactory.

Do you have any comments or questions regarding the Solution Maintenance?  
Let us know! Get in touch via email at [service@1clickfactory.com](mailto:service@1clickfactory.com) or visit the [1ClickFactory website](http://1ClickFactory.com).