Corporate Renaissance Group
Company Combiner Checklist

CRG Company Combiner gives organizations the ability to change their Microsoft Dynamics GP setup. With Company Combiner, multiple companies with the same chart of accounts can be combined into a single company.

After using Company Combiner, organizations are able to easily manage all the companies that they setup in Microsoft Dynamics GP from a single company.

Learn more about Company Combiner: www.crgroup.com/combiner

Please complete the following checklist and submit to Doug Hum at dhum@crgroup.com or fax to 613.232.7276.

Company Name: Enter company name here

Partner Name: Enter partner name here

Requirements Checklist:

Requirement	Notes	Response
Will you be using the Multi-Entity Management Solution from Binary Stream		☐YES ☐NO
Number of Target Companies	*Note that we do not create a new company. One of your existing companies must be the target.*	Click here to enter text.
Number of Source Companies to be combined into the target company	*If more than one Target Company is to be created, please identify the number of Source Companies to be combined for each Target company (excluding the target company).* *We will need a list of the databases and size.*	Click here to enter text.
The Dynamics GP version	*Combiner is only available for Dynamics GP 2010 onwards. If GP is on an earlier version, it will need to be upgraded to GP 2010 or higher.*	Click here to enter your version of Dynamics GP.

Server Location	Are the **Test** servers in the cloud?	☐YES ☐NO
	Are the **Production** servers in the cloud?	☐YES ☐NO
Source data is clean and consistent.	It is assumed that all of the data cleanup (GL accounts, Vendor IDs, Item Numbers and Customer IDs) will be completed prior to our team starting the testing phase of this project. Any duplicates found among companies will be automatically merged. CRG Changer can be purchased for that purpose. *Financial Reconcile and Check Links on all modules will be run prior to Combiner by CRGroup, therefore these utilities should be run prior to providing us the data to confirm that the data is clean.*	Click here to enter text.
All companies have matching core characteristics.	Do all companies being merged have the same functional currency, same fiscal periods/years and same Account Format?	☐YES ☐NO ☐UNSURE
Has the data been archived?	Have you run any archiving process or deleted historical data?	☐YES ☐NO ☐UNSURE
OLE Notes	Were OLE notes used any time which are migrated to Document Attachments?	☐YES ☐NO ☐UNSURE
Currently Installed Modules	Please indicate which of the following modules are currently in use in any of the companies- that is, they contain data to be combined.	**In Use?** *Check all that apply*
	General Ledger	☐
	Receivables Management	☐
	Invoicing	☐
	Sales Order Processing	☐
	Payables Management	☐
	Purchase Order Processing	☐
	Payroll **(Note – Payroll Records are NOT combined)**	☐
	Fixed Assets	☐
	Inventory Management Is Inventory Reconcile run on a regular basis?	☐ ☐YES ☐NO ☐UNSURE
	Collections Management	☐
	Revenue/Expense Deferral	☐
	Bank Reconciliation	☐

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	Other GP or Third-Party Modules:	List third party module here
		List third party module here
		List third party module here
		List third party module here
Remote Access is available to Test and Production environments	As the work is done remotely, CRGroup requires internet access to Test and Production.	☐YES ☐NO ☐UNSURE

Thank you for completing the Company Combiner Checklist!

Please complete the following checklist and submit to Doug Hum at dhum@crgroup.com or fax to 613.232.7276. If you have questions please contact Doug Hum at 1.800.576.6215 x:286.