



CUSTOMIZATION AND MOVING FORWARD

FlexOp PRO is designed based on best practices in the industrial service and repair industries. It is designed specifically to bring unique advantages, efficiencies, and new business features to these industries. The tasks library allows options for a company to incorporate their own familiar business rules into the software. Experience shows there are many gaps of business process when adapting an ERP. The customer can realize greater efficiencies with customer service, sales, vendor communications, shop floor involvement and management approval and oversight by closing these gaps. The FlexOp 360 team and owner must discuss in length the usefulness of the library adapting this methodology. What to Expect:

The knowledge of the team — skills and acceptance of change — will be a key factor as your project moves forward. It will begin with initial meetings to establish and assign key roles to individuals who will support the project. The primary support roles are: developer, project manager, subject matter expert (SME), tester and project owner. These roles are often shared by the same person/people.

The first meeting introduces FlexOp PRO's navigation features, process flows and business templates throughout the system. This meeting determines which FlexOp PRO features are needed for basic customizations. The project manager will determine if an existing module can be modified. If it is determined that a new module is required or additional enhancements to an existing feature is needed, it will be included in the new timeline allowing for additional development time, approvals and new layouts.

FlexOp Work Scope:

- Meetings would be preferred every two weeks set at the same time. Meetings can be done via video web links. Follow-ups will involve emails, screen snapshots and videos to show navigation.
- The project manager is responsible for monitoring all development and keeping project status within timeline.
- The owner, SME and the team will play a critical role in final acceptance of initial feature set of FlexOp PRO.
- 20 percent additional meeting time is required for new development cycles. Estimates for new feature development time will be based on new layouts for user interfaces, new scripting or portal connections. Notes for new features will be shared with team.
- Once the team accepts a new feature, the developer will determine navigation adjustments to the timeline.
- Development, testing and approval of new features may extend the project timeline.
- Data will be migrated to the new system and subject to verification to determine whether it was accurately transferred, is complete and supports new processes.
- Final user testing takes place at the owner's facility utilizing the Filemaker platform. (Checklist)
- When all features have been approved, a complete beta version will be released for testing. All features will be retested and accepted by the team before going live.
- FlexOp will provide full support and training on the new system at your facility.

There are three levels to customization:

- **Level One:** Change the company's business processes or organizational policies to better match FlexOp PRO's out-of-the box standard features. The FlexOp 360 team works with the owners to determine a solution to fill the gaps.
- **Level Two:** Integrate the company's existing documents, files, and forms used for communications into FlexOp PRO. This customization allows for a smoother implementation and greater user acceptance. This is billed at the base-rate.
- **Level Three:** Incorporate custom modules or features that require additional coding into FlexOp PRO. This is evaluated on a case-by-case basis.

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