



DATE: September 9, 2019
SUBJECT: Letter of Clarification
RE: Consulting Services: Dynamics 365 to Dynamics Cloud Upgrade
TO: All Prospective Proposers

Houston First Corporation (“HFC”) issues this Letter of Clarification regarding the referenced Commercial Loan Broker RFP to answer questions timely received in the manner set forth below:

Question 1: Has HFC purchased licenses for Dynamics 365 for Finance and Operations?

Answer: Yes.

Question 2: Will the Consultant selected be required to work with an existing Dynamics partner?

Answer: No.

Question 3: What is the user count for each license type in Dynamics AX 2012?

Answer: Dynamics 365 Unified Operations Plan: Twenty available; one assigned.
Dynamics 365 Unified Operations – Activity: Twenty available; zero assigned.

Question 4: What are the known challenges with the current Dynamics AX 2012 application implementation?

Answer: HFC is not looking to correct challenges or change the way it operates with its current software.

Question 5: What processes are being used by HFC in the Human Resources module in Dynamics AX 2012?

Answer: None.

Question 6: What is the payroll software and is it integrated with Dynamics AX 2012?

Answer: HFC uses ADP. It is not integrated with Dynamics AX.

Question 7: What is the requirement for post-implementation support services?

Answer: While support services are preferred, the duration and level offered must be recommended by each Proposer.

Question 8: Is there any requirement of data cleansing of master data before migration of data to Dynamics 365 for Finance and Operations?

Answer: There is no such requirement. If, however, the Proposer does not intend to or is unable to complete the data migrations, then such approach needs to be disclosed by the Proposer, including an explanation of how it intends to accomplish the cut over and how far back the Proposer will go.

Question 9: Given the database size, is HFC open to a data upgrade over selective data migration approach?

Answer: HFC is relying on the advice and direction of each Proposer regarding the best means of achieving the data migration.

Question 10: Does HFC have Test Cases/Scripts available in Dynamics AX 2012 for system testing & automation testing (RSAT)?

Answer: HFC does not have any automation scripts, but intends to develop business process testing internally.

Question 11: What is the expected level of training?

Answer: While HFC would prefer training for business users and administrators, as well as technical support, the type, duration, format, location, and other training and support offered must be determined and recommended by each Proposer.

Question 12: Is there a budget figure available you will share with potential Proposers?

Answer: No.

Question 13: Is HFC open to working with an international company with an office in the U.S.?

Answer: Yes.

Question 14: Can a company with AX experience that has never applied to be a Microsoft partner submit a Proposal?

Answer: Yes.

Question 15: Does HFC have a scheduled contingency for the project, such as a six-week extension of the Go Live date?

Answer: No.

Letters of Clarification become a part of the RFP automatically upon issuance and supersede any previous specifications and/or provisions in conflict therewith. By submitting their Proposal, Proposers are deemed to have received all Letters of Clarification and to have incorporated them into their Proposal.