

Packaged Services by Journey Stage

Onboarding



Success4U packages are organized around three journey stages—Onboard, Adopt, and Operate— reflecting the natural lifecycle of every customer. Each stage helps you progress confidently from initial setup, to optimization, to long-term operational excellence. Please find below some examples of Onboarding packages.

Packaged Service	Outcome Category	Description	Function	Product Applicability
Onboarding for ERPx - Standard Deployment Services	Financials	Establishes your ERPx foundation with a fully configured baseline system, core financials, and essential data migrated and ready for adoption.	CFO	ERPx
Execution - Solution Assurance and Governance	Advisory & Execution	Provides embedded architectural oversight to ensure solution viability, reduce delivery risk, and maintain cross-functional alignment throughout complex projects.	Universal	ERPx, ERP CR, FP&A, U4F, S2C
Onboarding for ERPx – Planner	Financial Planning	Enables controlled project budgeting and forecasting by configuring Planner and migrating your planning data.	CFO	ERPx, ERP CR
Onboarding for ERPx - Absence Management Service	Human Resources	Implements structured absence rules and pay-impact handling so organizations can accurately record, transfer, and process absences.	CPO	ERPx, ERP CR
Integrations - Microsoft Teams Integration	Integrations	Automates the creation of Teams channels and synchronizes ERPx project members to streamline collaboration from project kickoff.	CIO	ERPx
J2X Standard Migration Service	Journey to ERPx	Delivers a structured, low-risk migration from ERP CR to ERPx with clear assessments, functional alignment, and guided adoption of new ERPx capabilities.	Universal	ERPx
Onboarding for ERPx - Direct Debit Service	Order to Cash	Enables the management of direct debit mandates automate payment collection, and streamline AR remittance processing.	CFO	ERPx, ERP CR
Onboarding for ERPx - Pay Scales and Increments	Payroll	Enables consistent, organization-wide pay scale management an automated employee progression through defined pay steps.	CPO	ERPx, ERP CR
Onboarding for ERPx - People Planning	Project Lifecycle	Introduces People Planning to enable efficient resource assignment and time allocation across projects.	PMO	ERPx, ERP CR
Onboarding for ERPx - Data Mapping & Cleansing	Reporting	Provides expert-led workshops to map and cleanse legacy data, ensuring high-quality, migration-ready datasets.	Universal	ERPx, ERP CR
Onboarding for S2C - Contract Management & ERP Integration Service	Source to Pay	Enables seamless transfer of contract and supplier metadata from S2C to ERP.	CFO	ERPx, ERP CR, S2C