A Smoother Payroll Transition with Help from AI

How to use generative AI to go from “we know we will need to move off GP” to a vendor-ready plan in hours instead of weeks.

4	**~1 hr**	**0**	**1**
step sequence	of your time	technical skill required	worked example throughout

Most finance leaders already sense that AI could help them plan a payroll migration. The trouble is that a blank chat box tends to produce blank-sounding answers. Generic prompt, generic output. This guide fixes that.

It covers the two habits that separate useful AI work from wasted time, then walks you through a four-step sequence that turns a vague “we should probably move off Dynamics GP” into a discovery document you can hand to a vendor. You will also see a worked example the whole way through, so you know what “good” looks like before you start.

You do not need to be technical. You need about an hour and a willingness to give the AI real context.

PART 1

Two habits that make AI actually useful

If you take nothing else from this guide, take these two.

1. Ground it with your world

An AI model knows a great deal about payroll in general and nothing about yours. Left to guess, it fills the gaps with averages, and averages are what make output feel generic.

So before you ask for anything, teach the model about your world: who you are, how you run payroll today, who touches the process, what is painful, and what cannot change. Do this once, in a single context brief, and reuse it. If your tool supports projects (Microsoft 365 Copilot and ChatGPT both do), create a project, drop the brief in, and let every prompt draw from it. If it does not, keep the brief in a document and paste it at the top of your session.

The payoff compounds. Every answer after that is grounded in your reality instead of a textbook's.

2. Give it the destination, not the directions

Treat the model like a capable driver with a good map. Tell it where you want to end up and let it choose the route. When you script every turn ("first list this, then categorize that, then format it this way"), you cap the result at your own imagination and you talk the model out of insights it would have offered on its own.

WEAK	STRONG
"List five risks of a payroll migration in a table."	"I'm moving payroll off GP. Tell me what I'm most exposed to and what I'm probably not seeing."

The second prompt gives the model room to think. That is where the value lives.

A few smaller habits worth keeping

- **Skip the fake persona.** "You are a business analyst AI" adds little with today's models and can actually narrow the answer. Just describe your situation and your goal.
- **Ask it to argue with you.** After any output, try "Now play the skeptic. Where is this weak?" A second pass usually beats the first.
- **Keep sensitive data out.** Never paste employee PII (names, Social Security numbers, bank details) into a public AI tool. Anonymize it or use an enterprise-grade AI that keeps your data private.

PART 2

The four-step sequence

Here is the whole method. Four steps, built to run inside one continuous AI conversation s context carries forward from step to step.

STEP 1

Build your world

Fill in the worksheet below. Bullet points are fine. Complete sentences are not required.

Goal:

Create one reusable context brief so the AI understands your company before it does anything else.

YOUR WORLD BRIEF — WORKSHEET

Company snapshot

Industry

Employees, states / countries, legal entities

Pay frequencies and hourly vs. salaried mix

Current payroll setup

System and version — Dynamics GP (year, on-prem or hosted) Connected pieces (time capture, GL, benefits, tax filing, client billing) Customizations, and how data moves between systems today

The people

Who runs payroll / owns HR / handles IT and integrations / signs off

What hurts and what cannot change

Biggest pain points

Must be preserved (a critical integration, deadline, or requirement)

The decision and the guardrails

What you are trying to decide Rough timeline

Budget or resourcing limits

Here is what a filled-in brief looks like. Meet **Cardinal Staffing Group**, our example company for the rest of this guide.

WORKED EXAMPLE · CARDINAL STAFFING GROUP

Company snapshot. Staffing firm placing light-industrial and clerical workers. About 850 employees in two very different groups: roughly 50 internal staff (recruiters, account managers, and back office, mostly salaried) and about 800 placed employees working on assignment at client sites (hourly). Operates across IL, IN, OH, and MO. Weekly payroll for placed employees, biweekly for internal staff. Heavy turnover in the field, with starts and ends every week.

Current payroll setup. Dynamics GP, on-prem, in use since 2013. Field hours come in from many client sites by paper and a punch system, get emailed in for manager approval, and are rekeyed into GP by hand to run payroll. After payroll, a billing clerk rebuilds the same hours in a spreadsheet to invoice clients at each account's bill rate. GL lives in GP. Payroll taxes across four states are prepared manually. Nothing connects the hours we pay to the hours we bill.

The people. A payroll lead and a separate billing clerk who effectively enter the same hours twice, once to pay and once to bill. Recruiters and account managers own the client relationships. A two- person internal IT team plus an outside GP partner.

What hurts and what cannot change. Every hour is keyed twice, which is slow, error-prone, and delays client invoicing and the cash that comes with it. Leadership has no timely view of margin by client, assignment, or project, so we learn which placements are profitable long after the fact. High- volume weekly runs with constant onboarding and offboarding strain the manual process. Multi- state tax exposure keeps growing. We cannot miss a weekly pay date for field staff, cannot let invoicing slip, and cannot lose historical payroll or billing records.

The decision and the guardrails. Decide within two quarters whether to move to a Business Central payroll solution that drives client invoicing and assignment-level reporting from the same hours we pay. Budget is under review. Weekly field payroll and client invoicing cannot be disrupted during the switch.

Now let the AI turn your notes into a clean brief. Paste this:

PROMPT TO PASTE

I'm the CFO of a company planning to move payroll off Microsoft Dynamics GP onto a payroll solution built into Dynamics 365 Business Central.

Below are my rough notes about our company and current payroll setup. Turn them into a clean, organized context brief I can reuse throughout this project. Before you write it, ask me clarifying questions about anything important that's missing or unclear.

My notes:
[paste your worksheet here]

Answer its questions, let it produce the brief, and save that brief. This is your world. Everything else references it.

STEP 2

Stress-test where you stand

Goal:
An honest read on your current state and the risks you are not seeing, before you spend a dollar or a vendor's hour.

PROMPT TO PASTE

Using the context brief above, give me a candid assessment of our current payroll operation and what a move off GP really involves.

- Where are we most exposed today (process fragility, compliance gaps, reporting blind spots, key- person risk)?
- What will this migration actually take that finance leaders tend to underestimate?
- Challenge my assumptions. Where does my thinking look thin or optimistic?

Then give me the questions I most need answered before I talk to any vendor.

If your payroll, HR, or IT leads have input, add it here after anonymizing it. Ask the AI to incorporate it and identify points of disagreement. Disagreement is signal, not noise.

THE STATUS QUO WORTH KEEPING

Payroll lives inside the ERP.

> Ask of every option: is payroll part of the ERP, or a separate payroll system connected to it by an integration?

Before you build your discovery document, get clear on the single distinction that matters most. Coming off Dynamics GP, this is your status quo. GP put payroll inside the ERP. The real risk in a migration is quietly trading that down for a payroll product that lives outside your new ERP and talks to it through a connector.

Most differences between payroll products are cosmetic. One is not. A separate system means two databases, two sources of truth, and a sync that runs between them. Every sync is a place where data drifts, breaks, or waits on someone to fix it. That is the hidden tax most GP shops are already paying wherever their systems are disconnected today, just with spreadsheets and rekeying instead of a modern connector.

Payroll built into the ERP means one system and one set of data. Time, payroll, the general ledger, and reporting all read from the same place, so there is nothing to reconcile between them. This one design choice shapes everything downstream: data accuracy, reporting speed, compliance, and how much manual work your team keeps doing after go-live. Make it the first thing you evaluate, not the last.

STEP 3

Build your internal discovery document

Goal:
A candid, complete picture your team can align around. This version stays inside the company, so hold nothing back.

PROMPT TO PASTE

Using everything above, draft an internal discovery document for our team. This version is candid and stays inside the company.

Capture our real current state and pain points, the priorities for a new solution, the risks and compliance factors, our budget range and timeline, and any key-person or internal constraints. Rank the priorities. Flag every question or decision we still need to settle internally.

Then play the skeptic and tell me what we're glossing over.

This is the version where you keep the hard truths: the budget ceiling, the person who is the only one who understands a GP customization, the decision you have not made yet. None of that belongs in a vendor's hands, but all of it should shape your plan.

Do not rush to Step 4. The internal document is a draft until your team has been through it. Share it with your payroll, HR, and finance leads, mark up what is wrong or missing, and settle the open questions it surfaced. This is where the real thinking happens, and it is worth more than any single AI output.

When the team has revised it, feed the updated version back to the AI so it plans from your corrected reality, not its first draft:

PROMPT TO PASTE · AFTER TEAM REVIEW

Here is our internal discovery document after the team reviewed and revised it. Replace your earlier understanding with this version and treat it as the source of truth from here on.

[paste the revised internal document]

Confirm what changed from your draft, and flag anything that now looks inconsistent or still unresolved.

Only once the AI is working from the team-approved version, and not before, move to Step 4.

STEP 4

Build the external discovery document

Goal:
The version you actually hand a vendor. Same substance, curated for the conversation you want to have.

PROMPT TO PASTE

From the team-approved internal discovery document above, produce the external version we'll share with vendors.

Keep what helps a vendor tell us, quickly and honestly, whether they're a real fit: our context, current state and pain points, prioritized requirements, and the questions we'll ask them. Leave out anything that weakens our position or doesn't belong in a vendor's hands, such as our budget ceiling, internal politics, and decisions we haven't settled.

Treat how tightly payroll is built into the ERP as a top-priority requirement, and include direct questions that test whether each vendor's payroll lives inside the ERP or connects to it as a separate system.

Once you've drafted it, switch roles. Read it back as a skeptical vendor and tell me what's missing, vague, or would slow down our evaluation. I'll refine from there.

On the next page is a slice of the external version for Cardinal Staffing Group. Refine it, add anything specific to your business, and you have a vendor-ready plan you built in an afternoon.

WORKED EXAMPLE · EXTERNAL DISCOVERY DOC

Executive summary

Cardinal Staffing Group runs payroll for roughly 850 employees, about 50 internal staff and 800 placed field employees, across four states on Dynamics GP. Field hours are captured at client sites, rekeyed into GP to run weekly payroll, and then rebuilt a second time in spreadsheets to invoice clients, which delays billing, ties up cash, and gives the same hour two chances to be wrong. Leadership has no timely view of margin by client, assignment, or project. Cardinal is evaluating payroll built into Dynamics 365 Business Central so one record of hours drives pay, client invoicing, and assignment-level reporting from a single system.

Top priorities, ranked

1. **Payroll built into the ERP rather than connected to it.** One system and one source of truth, so time, payroll, GL, billing, and reporting stop depending on exports and manual syncs.

2. **One capture of hours that drives both pay and billing.** Invoice clients for hours worked, at each account's bill rate, straight from the same approved time record used to pay the employee, so billing is fast and always matches payroll.

3. **Project- and assignment-level reporting.** Hours, cost, and gross margin by client, so leadership can see which placements are profitable in real time.

4. **Automated multi-state payroll tax handling** for a high-volume, high-turnover field workforce. 5. **A migration path that preserves historical payroll and billing records** and protects every weekly pay date and invoicing cycle.

Questions for vendors

Does your payroll live inside the ERP application itself, or is it a separate system that connects to it by an integration? Walk us through where the hours, pay, and billing data actually live.

Can a single approved timesheet drive both the employee's pay and the client's invoice at different rates? Show us how pay hours and bill hours stay in step.

How do you report hours, cost, and gross margin by client, assignment, or project, and how current is that data?

How do you handle multi-state payroll tax and the constant onboarding and offboarding of a large field workforce?

What does your GP data migration look like, and how do you protect sensitive payroll data during the move?

BEFORE YOU GO

A few guardrails

AI accelerates the thinking. It does not replace your judgment. Read every output critically. When it gets something wrong, you have two ways to fix it, and both keep the AI working from the correction. You can edit the document yourself, then paste your version back and tell the AI to treat it as the current source of truth. Or, usually the stronger habit, describe the destination (the result you want from the change) and let the AI make the edit. Keep your team involved in the decisions, and validate anything that touches compliance against a real expert. And protect your data: keep PII out of public tools, or use AI that keeps your information private.

Used this way, AI gets you most of the way there and leaves the final call, where it belongs, with you.

FROM PLAN TO EXECUTION

A clear plan is the hard part — and you just built it.

The next move is choosing a solution that removes the friction GP has been adding rather than relocating it somewhere new. That is where Integrity Data comes in. **Payroll NOW** runs inside Dynamics 365 Business Central as part of the ERP itself, so there is no separate payroll system to sync, reconcile, or keep in step. Payroll, HR, and finance work from one set of data.

That single design choice delivers the automation, reporting, and compliance capabilities legacy GP payroll was never built for — and our team focuses on making the move manageable: cleaner data preparation, realistic timelines, and security throughout. When your discovery document is ready, bring it to us. We will give you a candid read on fit with no pitch, and if we are the right partner, map a clear path from planning to a payroll operation that finally works the way you need it to.

Email us at hello@integrity-data.com with your discovery document attached.

Get a candid, no-pressure fit assessment for Payroll NOW in Business Central. We are here to help you assess your options at your pace.