## Two people looking at a tablet

Dynamics 365 AIM Assessment Report

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# Assessment objective

The migration assessment aims to outline the path to cloud transformation. It focuses on understanding the present solution usage, emphasizing the benefits of migration, and designing an efficient and cost-effective migration strategy.

The migration assessment was conducted on <CustomerName><AX Version> systems and the key activities were:

* Functional and technical assessments derived from data obtained from the updated analysis tool and subsequent conversations with your team.
* Code analysis of existing AX code using tools to assess customization details and complexity and effort to convert to extension.

The Migration Assessment involved the following activities:

* + Recommendations on new and enhanced Dynamics 365 features tailored to your usage.
  + Technical migration strategy recommendations include:
    - Assessment of code upgrade with extension framework
    - Suggestions and recommendations on upgrade approach
    - Assessment of data migration approaches
  + Future road map for integration landscape
  + Recommendation for data intelligence and the reporting needs

# Solution assessments

The following section describes high level assessment of <Customers> Dynamics AX solution as compared to Finance and Operations

## Solution overview

<Update the highlighted content based on your assessment >

Customer XYZ produces animal feeds for all different type of animal and all different type of feeds. Feed is low margin business . Pricing is key. Lots of commodity goes in the feed. Pricing is calculated weekly. Commodity pricing > bestmix > formula > production line. Lots of business to distributer and farmers. Feeder finance, feed on credit from distributor.

Process manufacturing - used formulas to create feeds - feeds made of 5 to 25 items. Commodities , vitamins etc. Bestmix as formulation software .. Create formula > pass it ax > pass to mill . P&L for individual plan to major plans .. Critical to control cost and pricing. Freight charges passed to plants.

Food quality safety .. Detailed quality assurance. Most of the outside. Lab testing is external. Lab is custom module.

Following table summarizes the Dynamics AX System information and uses

<Update the highlighted content based on information from assessment tool and customer interview >

|  |  |
| --- | --- |
| **System information** | **Details** |
| Microsoft Dynamics AX version | AX2012 R3, CU 8 |
| Module used | Production, AR, AP, Inventory |
| Number of Legal Entities | 40 |
| Countries | East US serving North America region |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Observations and alternatives for ISV solutions The table below provides an overview of the ISV utilized for different features in the current Dynamics AX solution. It also highlights observations, the business value of new features and improvements in Dynamics 365 to evaluate standard features to replace ISV.  <Update the highlighted content based on information from assessment tool and customer interview >   |  |  |  |  | | --- | --- | --- | --- | | **Feature** | **Observation** | **Dynamics 365 Business Values** | **Resources** | |  |  |  |  | |  |  |  |  | |  |  |  |  | |  |  |  |  | |
| Insights and Recommendations in Supply Chain Management Since its launch in 2017, Dynamics 365, as a cloud ERP, has continually evolved, adapting to emerging business requirements, introduce new modules or tools that add depth to the ERP suite and enabling businesses to do more with a single system. The table that follows offers a summary of the Supply Chain Management functionalities employed in the current Dynamics AX setup. It underscores key observations and pinpoints the business value of new features and enhancements in Dynamics 365 Supply Chain. Your business can harness this value by either supplanting customizations in this domain or by refining prevailing business operations to maintain a competitive edge.  <Update the highlighted content based on information from assessment tool and customer interview >   |  |  |  |  | | --- | --- | --- | --- | | Feature | Observation | Dynamics 365 Business Values | Resources | |  |  |  |  | |  |  |  |  | |  |  |  |  | |  |  |  |  | |
|  |
| Insights and Recommendations in Finance The next table shows the Finance features from the current Dynamics AX system. It points out important observations and shows the benefits of new features and updates in Dynamics 365's Finance area. By using or updating these features, your business can make its financial processes better and stay ahead in the market.  <Update the highlighted content based on information from assessment tool and customer interview >   |  |  |  |  | | --- | --- | --- | --- | | Feature | Observation | Dynamics 365 Business Values | Resources | |  |  |  |  | |  |  |  |  | |  |  |  |  | |  |  |  |  | |
| Retail components recommendations Like the Supply Chain and Finance products, the Retail components of Dynamics 365 exhibit notable technological and functional progress compared to the on-premises versions in Dynamics AX. Many of these Retail components have completely new architecture or entirely new in the cloud version. The table below provides an overview of the Retail components used in the current solution, along with observations, business value, and recommendations.  <Update the highlighted content based on information from assessment tool and customer interview >   |  |  |  |  | | --- | --- | --- | --- | | **Feature** | **Observation** | **Dynamics 365 Business Value** | **Resources** | | Retail architecture |  |  |  | | Retail software components |  |  |  | | Retail customizations |  |  |  | | Retail hardware components |  |  |  | | E-Commerce |  |  |  |  Technical observations and insights |

Just as Dynamics 365 continuously enhances its functional areas, its regular updates have introduced many technical and performance improvement in the core back-office processes. These improvements come from incorporating the latest technological innovations and scalability options available in the cloud. The table below lists key features from the Dynamics AX environment that have seen notable performance and usability enhancements. In most instances, these upgrades are readily available within the system for users to benefit from.

<Update the highlighted content based on information from assessment tool and customer interview >

|  |  |  |  |
| --- | --- | --- | --- |
| Feature | Observation | Dynamics 365 Business Values | Resources |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## Localizations observations and availability

Dynamics 365 offers support for a broader range of languages, countries, and localizations than previous versions of Dynamics AX. Moreover, the Electronic Reporting module in Dynamics 365 enables localization through configuration rather than coding. This shift greatly enhances flexibility, making it easier to adapt to changes and improvements in regulatory features. The tables below list the countries where you operate, along with the out-of-the-box localization support provided by Dynamics 365.

<Update the highlighted content based on information from assessment tool and customer interview >

|  |  |  |  |
| --- | --- | --- | --- |
| Feature | Observation | Dynamics 365 Business Values | Resources |
| Country localization | We observed that your current environment has legal entities that belong to the following countries = where support for localization is added out-of- box. |  |  |

## Key customization observations

Based on the code upgrade analysis and subsequent discussion with the project team, the following table summarizes the key customization observations as part of your Dynamics AX solution. With many new features and enhancements in Dynamics 365 over the years, it may be possible for customers to remove such customization and adapt out of the box process, however this requires thorough analysis of the customization and change management to replace customization.

<Update the highlighted content based on information from assessment tool and customer interview >

|  |  |  |  |
| --- | --- | --- | --- |
| **Feature** | **Observation** | **Recommendations** | **Comments/Resources** |
| General | Heavy customization in Sales and Marketing, Inventory management and Production module. |  |  |
| General | Heavy intrusive customization in Production module |  | Potential of high number solution redesign. |
|  |  |  |  |
|  |  |  |  |
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|  |  |  |  |
|  |  |  |  |

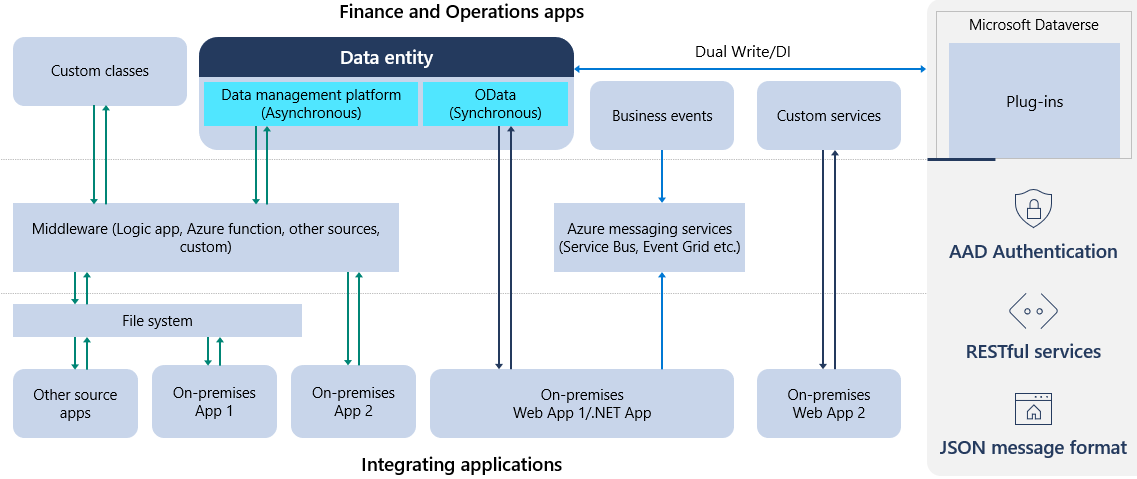
## Integration assessments and recommendations

Finance and operations is a reimagined ERP application that is designed for cloud deployment, meaning that you will find significant differences in the architecture, specifically integration as compared to integration approach adapted in on-premise applications. For this reason, existing integrations must be analyzed and possible solutions for existing integrations must be discussed.

Because the integration framework has changed, it’s likely that your integrations will need to be redesigned when you’re upgrading to finance and operations apps. During this time, make sure that you consider the following:

* Use this opportunity to modernize the integration stack.
* Use cloud integration platform.
* Simplify the overall architecture and try to reduce the number of integrations between applications, wherever possible.
* Factor effort and cost.
* Consider impact on integrating applications.

The following image highlights the finance and operations apps integration landscape.



Follow the documentation to learn more [Compare integrations in finance and operations apps with Dynamics AX 2012 - Training | Microsoft Learn](https://learn.microsoft.com/en-us/training/modules/compare-integration-ax-2012-finance-operations/)

The following tables highlight interfaces currently used, current solution, proposed solutions option with complexity assessment.

<Update the highlighted content based on information from assessment tool and customer interview >

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Interface name** | **Description** | **Mode/Direction**  **/Frequency** | **Current solution** | **Proposed solution** | **Complexity** |
| CompactStore |  | Asynchronous Outbound | Custom batch job to create file in on-prem folder | Two options: generate XML file with FnO code. Use XYZ document queue and action triggers to generate file. Push file to on-prem folder | Medium |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

## Reporting and BI assessments

An important step in your upgrade journey is to determine how you will provide your users with the reporting and analytics that they need to make decisions. When upgrading to Dynamics 365, your reporting architecture will appear very different because you are now on the cloud.

Several reporting capabilities that you might use with Dynamics AX 2012 are:

* SSRS reports
* Financial reports using Management reporter
* SSRS and Power BI reports on replicated database
* Improvised SQL queries directly on the database or embedded in Microsoft Excel
* Datawarehouse/Datamart solutions with Power BI or other reporting tools

Dynamics 365 provides comprehensive native capabilities for BI Analytics and reporting within application, along with direct integration with Microsoft data platform Microsoft Fabric to build modern data solutions in the cloud. The following diagram highlights the reporting and BI capabilities in Dynamics 365.

A screenshot of a computer

Description automatically generated

* **Native controls**: Forms and operational inquiry pages to provide real-time operational reporting with simplified, optimized experiences in the app that are customized to the user and the organization.
* **Operational workspaces:** Central location for a user to start their daily activities, and it provides a highly visual, interactive experience for users.
* [Business documents management](https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/analytics/er-business-document-management): Enables business users to edit business document templates by using Microsoft 365 services or appropriate Microsoft Office desktop applications.
* [Financial reporting](https://learn.microsoft.com/en-us/dynamics365/finance/general-ledger/financial-reporting-getting-started) : Financial reporting helps financial and business professionals create, maintain, deploy, and view financial statements.
* [Business performance analytics](https://learn.microsoft.com/en-us/dynamics365/finance/business-performance-analytics/business-performance-analytics-home-page) : Powerful tool for gaining insights from data in a user-friendly and comprehensive way across multiple business processes.
* [Microsoft Fabric](https://learn.microsoft.com/en-us/fabric/get-started/microsoft-fabric-overview) Link: Dynamics 365 data in Microsoft Fabric an all-in-one analytics solution for enterprises that covers everything from data movement to data science, Real-Time Analytics, and business intelligence.

[Compare reporting and analytics in finance and operations apps with Dynamics AX 2012 - Training | Microsoft Learn](https://learn.microsoft.com/en-us/training/modules/compare-analytics-ax-2012-finance-operations/)

The following shows your current BI and reporting solution and proposed solution with Dynamics 365.

<Update the highlighted content based on information from assessment tool and customer interview >

|  |  |  |
| --- | --- | --- |
| **Reporting areas** | **Current solution** | **Proposed Solution** |
| Operational reporting | 1. SSRS reports within Dynamics AX 2012.  2. RDL based SSRS reports on reporting db server using AXDB and other data | Use List pages, Operational workspaces |
| Financial reporting |  | Use financial reporting |
| Business document reporting | SSRS reports in Dynamics AX 2012 or SSRS reports on Reporting db using AX and other system data | Use configurable business document or ISV |
| BI and Analytical reporting |  | Use Microsoft Fabric link |

## Data migration/upgrade assessments

When migrating from Dynamics AX, a pivotal choice is whether to migrate the entire database using the in-place data upgrade process or to opt for the migration experience that is bringing configuration, master, and opening balances.

<Update the highlighted content based on information from assessment tool and customer interview >

|  |  |  |
| --- | --- | --- |
| **Data Information** | **Details** | **Comments** |
| Database server type and version | SQL Server 2012 R2 |  |
| Database size (GB) | 500 |  |
| Database collation | Latin1\_General\_CI\_AI |  |
| Virtual company used? | No |  |
| Data partitioning used? | Use default single partition |  |
| Attachment storage | Database/ File server |  |
| Data entities | 10 |  |
| Location | USA, LATAM |  |

The tables below provide an overview of the data migration/upgrade options, highlighting specific scenarios and recommendations.

<Update the highlighted content based on information from assessment tool and customer interview >

|  |  |  |
| --- | --- | --- |
|  | **Data Upgrade** | **Data Migration** |
| **Tooling support** | Data upgrade service (AX 2012 R2/ R3) | Data migration framework |
| **Historical data** | Full historical data | Only configuration, master data and opening balances |
| **Data cleanup** | Only cleanup logs and history at source | Flexibility to clean data, change configuration. |
| **Release approach** | Big-bang only | Big-bang or phased rollout |
| **Customization/ ISV re-design** | Increased complexity – requires custom data upgrade scripts | Low impact |
| **Cutover time** | Higher cutover downtime and complexity with large database size. | Lower cutover time |
| **Cost** | Higher data storage cost in Dynamics 365 | Lower data storage cost to begin with |
| **General Best practice, recommendations** | Don't upgrade for the sake of reporting requirements.  Evaluate the quality and volume of your data and perform a data cleanup.  Consider purging or achieving your data at the source or target | Evaluate adapting new features and configurations as needed.  Move historical data to Datawarehouse for combined BI and Analytics |
| **Your scenarios and recommendation** | * Moderate database size (500 GB) * Moderate number of legal entities and location * Moderate solution re-design elements |  |

# Customization code migration assessment

In Dynamics AX 2012 and AX 2009, customers and ISVs could modify Microsoft-provided code for customizations or feature adjustments through a process termed 'overlayering.' However, in Finance and Operations apps, this direct modification of base code is no longer permitted. Instead of intrusive customizations, developers can now introduce new features and functionalities using the Extensibility model.

Using extensions to develop finance and operations apps is fundamental to Microsoft’s strategy of One Version, which allows all customers to be on the latest release by always acquiring continuous updates that are managed by Microsoft.

The new changes offer several advantages:

* Easier and more cost-effective upgrades with continuous updates
* Improved support and serviceability.
* Reduced costs for no-code adjustments and customizations.
* Simpler innovation for independent software vendors (ISVs).

During your upgrade to finance and operations apps, you will use the Code Upgrade Tool to move your code from your Dynamics AX 2012 model store to new code that will be compatible with finance and operations apps. Developers must move the code and business logic from overlayering to extensions.

Best practices for managing code for your upgrade:

* Identify customizations that are unused.
* Unify your code so that you can move forward with a single code-base strategy, if you have a global rollout. Upgrade is simpler with a single code base.
* Ensure that you have compatible ISV solutions on the newest version.
* Work to modernize your solution. Learn about new modern solutions and applications that you can use with your solution.
* Plan for a code freeze during your upgrade. We recommend that you freeze your code. If you are unable to do a hard code freeze, a soft freeze is recommended to only touch code for critical bug fixes.
* Plan to merge your delta code, possibly change your development approach, and bring changes to the new version manually, if you continue development in AX while you upgrade.

The following sections highlights the assessment of your AX 2012 code base, modification level complexity and high level effort required to convert from overlayering to extensions.

## Models installed

Following are the model installed in your Dynamics AX solution

<Update the highlighted content based on information from assessment tool and customer interview >

|  |  |  |  |
| --- | --- | --- | --- |
| **Layer** | **Model name** | **Model publisher** | **Model description** |
| Isv | DemandForecasting | Farsight Solutions Ltd. | Demand Forecasting by Farsight Solutions Ltd. |
| Var | RO | ALTIMATE | AX2012R3 ROMANIA Localization |
| Isv | AXTecmUpdate | AXtension bv | AXtension ECM – Update |
| Isv | AXTecmEP | AXtension bv | AXtension ECM - Enterprise Portal |
| Isv | AXTip | AXtension bv | Invoice Processing |
| Isv | AXTecm | AXtension bv | AXtension ECM |
| Isv | AXT | AXtension bv | AXtension Framework |
| Isv | AXTlabels | AXtension bv | AXtension labels |
| Usr | USR Model |  | System generated model for USR layer for Microsoft Dynamics AX |
| Cus | CUS Model |  | System generated model for CUS layer for Microsoft Dynamics AX |

**Model summary**

* ISV layer – there are 11 models installed from various ISV partners, confirm ISV solution readiness in Dnamics 365 F&O packages.
* VAR layer – there are 3 models installed for Romania, Croatia and Bulgaria localizations from partners.
* CUS layer – there are 3 models installed in CUS layer where most of the customization done for the customer (CUS,REPLabels). These models are considered for code upgrade.
* USR layer – there are 1 model installed in USR layer where small amount of customization done for the customer (USR). This model is considered for code upgrade.

## Modification level

The Customer’s solution Assessment uncovered the following modified objects versus a standard version of Microsoft Dynamics AX 2012:

<Update the highlighted content based on information from assessment tool and customer interview >

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Application Object Type** | **Customized Objects** | **Complexity Level** | | | | **New Objects** |
| **Small** | **Medium** | **Large** | **Not in scope** |
| **Tables** | 238 | 98 | 34 | 9 | 97 | 1036 |
| **Maps** | 19 | 4 | 3 |  | 12 | 11 |
| **Views** | 69 | 1 | 61 |  | 7 | 266 |
| **Extended Data Types** | 30 | 1 | 27 |  | 2 | 940 |
| **Base Enums** | 19 | 2 | 4 |  | 13 | 385 |
| **License Codes** |  |  |  |  |  | 6 |
| **Configuration Keys** |  |  |  |  |  | 35 |
| **Security Keys** |  |  |  |  |  | 57 |
| **Perspectives** | 1 |  |  |  | 1 | 8 |
| **Macros** | 8 |  | 2 |  | 6 | 47 |
| **Classes** | 456 | 23 | 93 | 29 | 311 | 8034 |
| **Forms** | 152 | 51 | 24 | 14 | 63 | 657 |
| **Info Parts** | 1 |  |  |  | 1 | 97 |
| **Form Parts** |  |  |  |  |  | 15 |
| **Cues** |  |  |  |  |  | 155 |
| **Cue Groups** |  |  |  |  |  | 60 |
| **Data Sets** | 4 |  |  |  | 4 | 85 |
| **SSRS Reports** | 30 |  | 27 |  | 3 | 51 |
| **Queries** | 12 | 3 | 2 |  | 7 | 696 |
| **Menus** | 13 | 2 | 2 | 1 | 8 | 12 |
| **Menu Items Display** | 3 |  | 3 |  |  | 991 |
| **Menu Items Output** |  |  |  |  |  | 81 |
| **Menu Items Action** | 1 |  | 1 |  |  | 546 |
| **Services** | 2 |  |  |  | 2 | 63 |
| **Service Groups** |  |  |  |  |  | 9 |
| **Code Permissions** | 1 |  |  |  | 1 | 1 |
| **Privileges** | 21 | 12 | 7 |  | 2 | 1263 |
| **Duties** | 11 | 10 |  |  | 1 | 349 |
| **Roles** | 6 | 6 |  |  |  | 140 |
| **Process Cycles** | 1 |  |  |  | 1 | 6 |
| **Policies** | 2 |  | 2 |  |  | 4 |
| **Resources** |  |  |  |  |  | 58 |
| **Label Files** |  |  |  |  |  | 10 |
| **References** |  |  |  |  |  | 4 |
| **Total** | **1,100** | **213** | **292** | **53** |  | **16,178** |

*Table 1 Customer’s Solution Modification Assessment*

<Update the bellow chart>

## Code upgrade - time investment

The Customer’s solution Assessment uncovered the following time investment:

<Update highlighted information based on the assessment >

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Object type** | **Action** | **Categories** | **Count** | **Estimate (H)** |
| Customized objects | Converting to Extension | Small | 1000 | 100 |
| Medium | 200 | 200 |
| Large | 100 | 400 |
|  |  |  |
| New objects | Fix code compilation/ refactoring | Small | 300 | 300 |
| Medium | 200 | 300 |
| Large | 10 | 40 |
| Not in scope |  | AIF | 300 |  |
| Enterprise portal | 20 |  |
| DMF Objects | 30 |  |
| Localization no longer needed |  |  |
| ISV Objects |  |  |
| Custom feature re-implementation | 100 |  |
| Replaced with OOB feature | 50 |  |
| Customization not used | 200 |  |
|  |  | **Totals** | **2710** | **1340** |
|  |  |  |  |  |
|  |  | **\* Estimate presented can vary +-50%** |  |  |

**Customization code migration Summary**

1. **Moderate overlayered customizations**
2. **Moderate effort to convert to extension.**

# Migration objectives, options, and next steps

This section highlights the migration objectives. The following table highlights the tooling available based on the version of your current Dynamics AX solution to help with the key migration activities.

<Highlight the Columns as per Customer Current Environment >

|  |  |  |  |
| --- | --- | --- | --- |
| **Version/Activity** | **AX 2012 R3, R2** | **AX 2012 RTM** | **AX 2009** |
| **Your AX Version** |  |  |  |
| Upgrade your existing customizations  (Custom X++ code) | [Code upgrade service](https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/migration-upgrade/analyze-code-upgrade) | [Code upgrade service](https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/migration-upgrade/analyze-code-upgrade) | Re-implement code |
| Migrate complete historical data | [Data upgrade service](https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/migration-upgrade/data-upgrade-self-service) |  |  |
| Migrate master data & opening balances | Data migration using [DMF](https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/data-entities-data-packages) | Data migration using [DMF](https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/data-entities-data-packages) | [Data migration tool](https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/migration-upgrade/data-migration-tool) |
|  |  |  |  |

When considering migration from Dynamics AX to Dynamics 365 in the cloud, it's essential to understand the migration objectives and business goals clearly. Having a clear understanding of objectives and goals helps us decide on the choices we can make for migration.

Based on the solution assessment, custom code assessment discussion with customers project team, table below shows key prefered objectives (highlighted in green)

<Highlight the Columns as per Customers goals. Information in this section to summarize the assessment with customer interviews>

|  |  |  |  |
| --- | --- | --- | --- |
| **Area** | **Objectives 1** | **Alternate Objective** | **Assesment** |
| **Digital transformation** | Land & Expand: First, upgrade to the new version with minimal changes, and then proceed with digital transformation. | Digital transformation by optimizing business processes and systems. | Significant feature improvement in the SCM and Finance to take advantage of |
| **Business disruption** | Minimize business disruption by reducing the change. | Minimize business disruption with phases rollout. | Moderate legal entities and site for big bang upgrade |
| **Existing customization investments** | Re-coupe investment made with customizations, ISV and business processes in prior version of AX. | Maximize the value by reducing customization and adopting new processes, technology and features. | Moderate customization to lift-shift, Replace ISV with out of the box feature |
| **Bring existing data** | Bring full historical transaction to minimize change. | Cleanup configuration, master data, financial dimensions and start fresh in the new ERP system. | Moderate data size to do data upgrade |

<Update the Your preference columns based on Customer interview and assessment >

|  |  |  |  |
| --- | --- | --- | --- |
| **Migration choices** | **Upgrade/ Lift-Shift** | **Re-Implement** | **Hybrid** |
| **Description** | **Land & Expand** -Bring everything as is with little or no changes. Adapt new features and process after going live. | **Starts fresh** - adapt new features and re-implement customization and business processes. | Code upgrade to re-coupe the investment and data migration to start fresh |
| **Recommendation** | Checkmark with solid fill |  |  |

The above assessment provides a high-level functional and technical overview of your solution and highlights new and improved features that can be valuable to your business. Assessment also provided the code upgrade and data migration recommendations.

Migration assessment is very first steps for your ERP modernization journey. The following diagram highlights various steps that are critical to the end-to-end ERP migration project. We expect that assessment output will help engage with Dynamics partner and prepare detailed project plans to execute for the end-to-end migration.

# Contact

Visit the Dynamics 365 Migration Program webpage for more information <https://aka.ms/d365migrate>