1. Calls start with introduction
2. Client shared the business process and domain
3. client explain working of external website linked with crm system
4. Client discuss main point about development and migration task of the project
5. The project will take place in 4 phase
6. Phase 1 -> first migration of existing system from 2011 to dynamic 365
7. Phase 2 -> external website to be converted into power pages or any other technologies
8. Phase 3-> make new gas program in dynamic 365 crm
9. Phase 4 -> in this phase there will be some extra other requirements which are out of scope in current situation

Planning of new gas program in third phase

Entire solution on to be on premise

Considration future is cloud

He explaine about the content of website which is build is adx studio that integrated with crm and domain of website is Energy and Mineral resource. And give overview of all the menu which is present in the website. Each menu has different domain and different url. Website also has register and login page . from there user can register and login

Login user has to pay some amount to see the bid documents , if logged in user does not pay the amount he is not able to show bid relatted document shuch as RFP

Website Url : ipp-storage.co.za

In existing modules all process in one place like sales marketing and services when we moved towards dynamic 365 y we will find every things in different module then there we can diverse all the existing process

Size of data on premise around 5.5GB

QHow many types of user are there on

One of the user using External portal and other one is very few people are using dynamic crm

Ans 5000 registerd users, Administer users

1. Asked for source code

As-> They don’t have source code but the has document form previous organization

Krishna gave overview of microsoft 365 to richard forx , to get some idea , how the website look and feel , way of approch from crm 2011 , towards the 13 , 15 and next to the 65 so we can start implementing fresh system based on whatever logics , in existing 2011 we are going to elimnate some of the features which is not needed in curently

Krishna suggest to Richard fox if we don’t find source code or plugin , then we can start sprint 1 directly from 365

Yashwant suggested if we can acess the system , so we have some chance get into the system and see and give some better ideas .and can give more solutions

Yashwant recommend if you want to stay on premise to on-premise there some functionality will be missing if we go for on-premise to online, for hybrid model we need to check with microsoft

The present system is going to be on-premise only , if you are on-premise the say on premise only if they are open for online or cloud platform then we direclty migrate to on cloud there is no need to go on-promise to on premise

Upgrade the MS Dynamics CRM (on premise) to Dynamics 365 and also to configure that the CRM runs hybrid.

Things we need to keep this questions in mind before proceeding over: is stated below-

Referring a conversation between client and developer read it carefully.

1. **Which version of On-premise currently using?**

Ans:- Microsoft CRM 2011

1. **What all the functionality are around?**

Ans:- The service provider will be required to install, configure and deploy the latest version of Microsoft CRM Dynamics on the IPPO server following required upgrade paths.

Setup both Test & Production environment.

Migrate the existing database and website integration to the new MS Dynamics 365 Test & Production environment.

Must have a documented backup and recovery process for entire solution.

Automated website back up must be configured from the webserver to the MS Dynamics 365 server for inclusion of the Tape library and/or off-site backups.

Solution to be hybrid run on cloud and local server

1. **How many users are connected to application?**

Ans:- Not Answered, But refer to Que 4.

1. **What all the security roles are being used?**

Ans:- Not known (only 10 users on MS dynamics 365).

1. **How many plugins are involved in the application?**

Ans:- not part of scope.(Replied).

1. **Which is the current website and on which platform that is running currently?(**Question Based on 2nd answer**).**

Ans:- The website will run on wordpress.

1. **This need to get migrated to Power platform Portals? (**Based on 6th Answer**)**

Ans:- we can do that as well, add that in the hours as well

1. **Do you want us to work on the testing/functionality part also?**

Ans:- Testing environment is a yes.(Lebkang did not understood ques)

1. **Sorry this is not about the testing environment, the question is about you want us to test the existing functionality on the Migrated Application? (**Based on 8th Answer**)**

Ans:- Yes we have to.

1. **We want to see the existing CRM application and website, kindly make that arrangement.(**Question based on 7th answer **).**

Ans:- Not possible, I have been shortlisted in the bidding process. I previously did a presentation with the state entity, we will have access to it if I am appointed. For now I need an estimate of hours based on my responses to you now. We will receive access when the work begins

1. **How many instance you want us to migrate like Dev, UAT(Test) and PROD?**

Ans:- Test and Production only.

1. **Is there any other Third party applications are integrated?**

Ans:- I do not know, if there is we will request further hours from you.

1. **How many custom entities are being used in the current applications?**

Ans:- Not known.

1. **Do you want data also get migrated and what is the size of it?**

Ans:- There is data yes, but I can tell you the size now.

**his migration is not Online/cloud right? This is to migrate on-premise 2011 to On-premise 365 latest?**

**yes, but they would like the option to run dynamics 365 hybrid which is cloud and local server. Is that possible?**

**With the help of ETL we can sync that and push data from online to local server**

**would be do we need any server licenses from Microsoft to do that?**

**Server License required User license will suffice server license as per current license model**

**so you mean whatever version of is running it should have a sever license. They are apparently running Microsoft CRM 2011, so In that case we don’t need an additional server licence to sync?**

**project owner would like to know if there are any other additional costs in order to run a Dynamics 365 hybrid solution. Do they need to have an Azure VPS and any licensing costs in order to run ETL for a hybrid solution. If there are, please mention them.**

**To answer this,**

**For ETL job we can use azure functions or data flow it may have some cost based on the number of the transactions**

**The project owner will be presenting their current CRM and the website application related to it. The project is to upgrade the 2011 CRM to Dynamics 365 and then advise which web application can be developed similarly to their current web application. after tomorrow they will provide us access to the current CRM and documentation include access to their server for planning and analysing before we commence with the migration**

**------------------------------**

**Upgrading Dynamics CRM 2011 to Dynamics 365 CRM involves several steps and considerations. Here's a high-level overview of the upgrade process:**

1. Review system requirements: Ensure that your current hardware and software meet the requirements for Dynamics 365 CRM.
2. Check compatibility: Verify that your current version of Dynamics CRM and any third-party integrations or customizations are compatible with Dynamics 365 CRM.
3. Backup your data: Make a backup of your current Dynamics CRM 2011 database and files.
4. Install Dynamics 365 CRM: Install Dynamics 365 CRM on a separate server or environment to avoid disrupting your existing system.
5. Migrate data: Migrate your data from Dynamics CRM 2011 to Dynamics 365 CRM. Microsoft provides several tools to help with this process, including the Data Migration Tool and the Data Loader Service.
6. Test and validate: Test and validate your data to ensure that it was migrated accurately and without errors.
7. Migrate customizations: If you have any customizations, such as plugins or workflows, you'll need to migrate them to Dynamics 365 CRM. You may also need to update them to work with the new version.
8. Train users: Train your users on the new features and functionality in Dynamics 365 CRM.
9. Go live: Once you've completed all the steps above and have validated your data and customizations, you can go live with Dynamics 365 CRM.

**Certainly, here are some references that you may find helpful for upgrading Dynamics CRM 2011 to Dynamics 365 CRM:**

**Below is the reference for upgrade upgrading Dynamics CRM 2011 to Dynamics 365 CRM :-**

**<https://learn.microsoft.com/en-us/previous-versions/dynamicscrm-2016/deployment-administrators-guide/hh699673(v=crm.8)>**

**Watch video to get implementation process.**

**<https://www.youtube.com/watch?v=Erqq5dIPaM4&t=13s>**

1. Microsoft's Dynamics 365 Upgrade Overview: This page provides an overview of the upgrade process, including system requirements, compatibility considerations, and migration steps. [https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/upgrade-overview](https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/upgrade-overview" \t "https://chat.openai.com/_new)
2. Dynamics 365 Migration Guide: This guide provides detailed information on migrating data and customizations from Dynamics CRM 2011 to Dynamics 365 CRM, including step-by-step instructions and best practices. [https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/migration-guide](https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/migration-guide" \t "https://chat.openai.com/_new)
3. Data Migration Tool for Dynamics 365: This tool helps you migrate data from your current Dynamics CRM system to Dynamics 365 CRM. It supports both on-premises and online versions of Dynamics 365 CRM. [https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/migration-data-import-export](https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/migration-data-import-export" \t "https://chat.openai.com/_new)
4. Dynamics 365 Data Loader Service: This service allows you to bulk import and export data in Dynamics 365 CRM. It can be used in conjunction with the Data Migration Tool to migrate large volumes of data. [https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/data-loader-service](https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/data-loader-service" \t "https://chat.openai.com/_new)
5. Dynamics 365 Customization and Development: This page provides information on how to migrate customizations from Dynamics CRM 2011 to Dynamics 365 CRM, including information on the changes to the customization framework in Dynamics 365 CRM. [https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/customize/migrate-customizations](https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/customize/migrate-customizations" \t "https://chat.openai.com/_new)