

Microsoft Dynamics 365 for Operations
Offering datasheet





Organizations with more agile deployment models had a **70% reduction** in implementation costs.

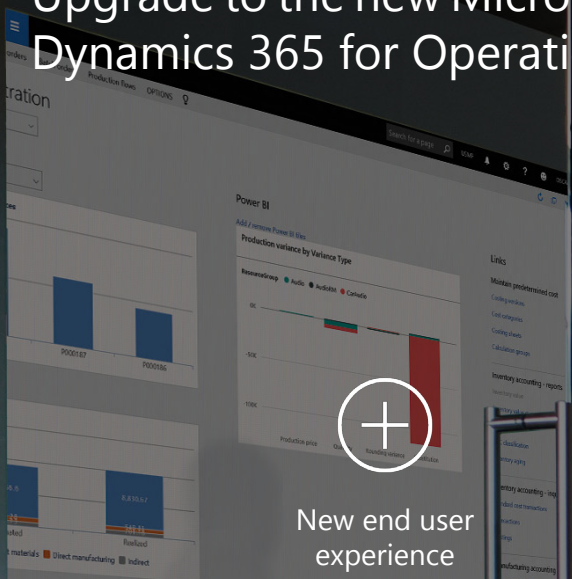
#MSDyn365

#migrate

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Upgrade to the new Microsoft Dynamics 365 for Operations



New end user experience



Predictable implementations



Platform elasticity



Out of the box HA/DR



Mobile-ready



Integration with productivity tools



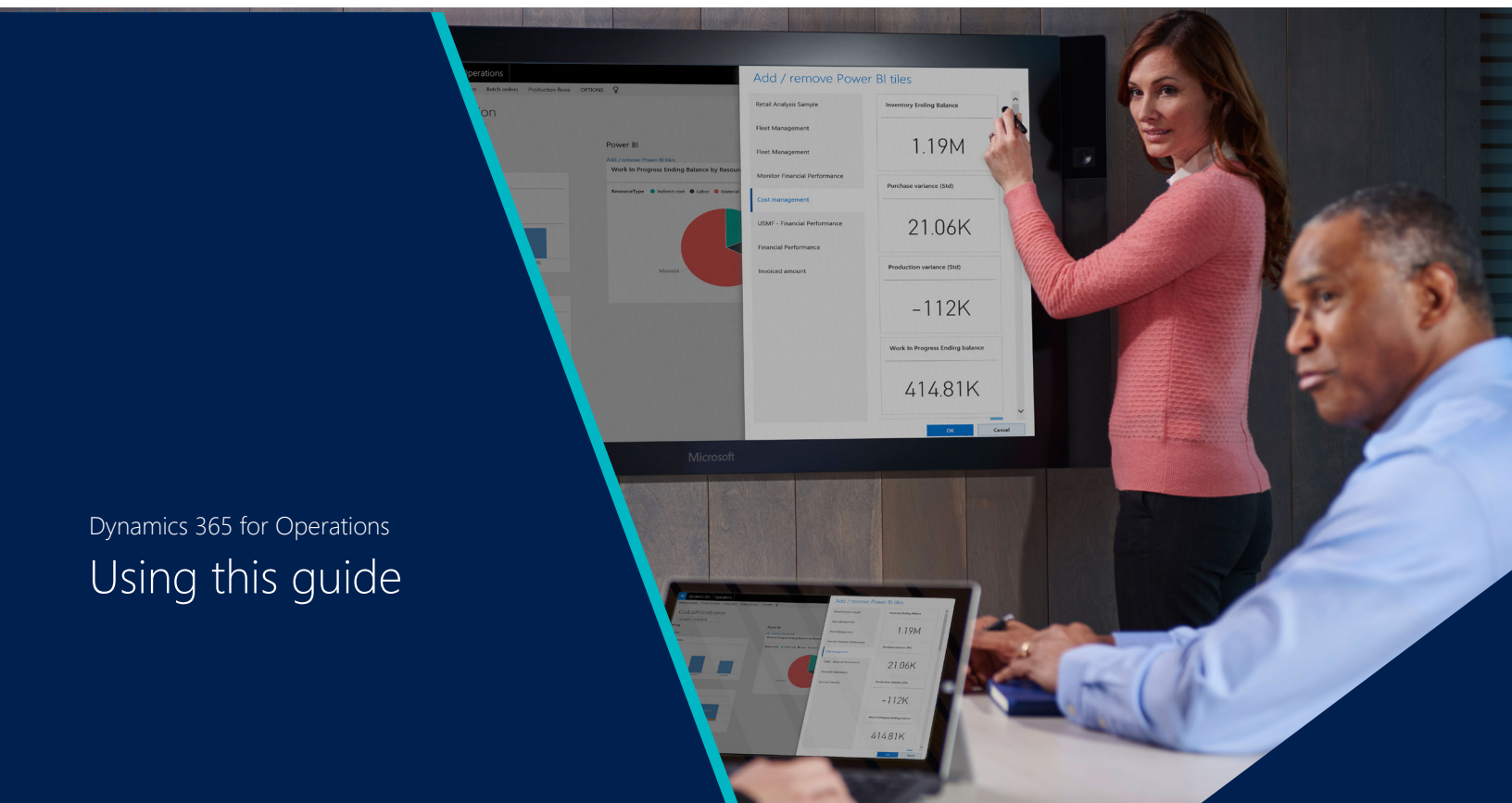
New functionality reduces customization



Migration tools



Eliminate hardware costs



Dynamics 365 for Operations Using this guide

Microsoft Dynamics 365 is the next generation of intelligent business applications that enable organizations to grow, evolve, and transform. These applications unify CRM and ERP capabilities by delivering new purpose-built applications that work seamlessly together to help manage specific business functions. Technology empowers you to adapt and grow - it helps you engage customers, empower employees, optimize operations, and reinvent products and business models. Microsoft Dynamics 365 helps you accelerate your digital transformation to meet the changing needs of your customers and capture the new business opportunities of tomorrow.

Use this guide to improve your understanding of Microsoft Dynamics 365 for Operations offerings. It does not apply to other Microsoft Dynamics 365 products or previous versions of Microsoft Dynamics products, including Dynamics AX. This guide is not intended to influence the choice of Microsoft Dynamics products and services. The examples presented in this guide are illustrative. Microsoft Corporation reserves the right to review and/or update the existing version of this document without advanced notice.

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Tools

- Data migration tools
- Code upgrade tools



Migration services

- ERP Upgrade Service



Advanced support services

- Upgrade
- ERP Solutions
- Implementation
- Microsoft Solution Planning Service
- Solution Architecture Assessment



AppSource

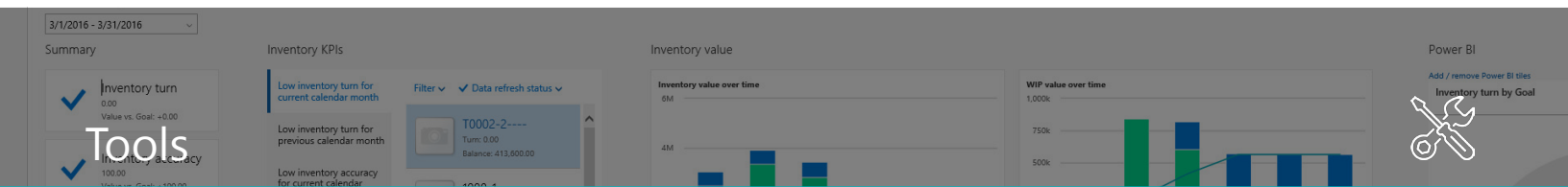
- Partner Led trial
- Trial offer code



Tools

- Data migration tools
- Code upgrade tools





Data migration tools

Data migration gives customers - starting with Dynamics AX 4.0 and Dynamics AX 2009 - the ability to migrate from legacy Dynamics AX versions without doing a full data upgrade. This includes configuration and setup, balances, open documents and pending invoices, system configuration, and anything else that has an entity.

Data migration includes:

Configuration and setup: Ledger, Customer groups, Vendor groups

Master: Customer, Vendor, Project, Accounts

Balances: Ledger balances, Stock, Prices

Open documents and pending invoices: Sales order, Purchase order, AR invoices

System configuration: Number sequences, Users, User groups, Security
Anything which has an entity (Ideally not historical transactions)

Learn more about Microsoft Dynamics 365 for Operations code migration tools.

Code migration

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Code upgrade tools

Code upgrade gives Dynamics AX 2012 customers the ability to upgrade to Dynamics 365 for Operations. All code types are converted as is, with the exception of Enterprise Portal, Custom Client controls, Document Services/AIF, Form parts (replaced by current Form parts), Cues, Visual Studio Projects, and reports/BI.

The code upgrade tool is an LCS service that will assist you in evaluating the effort for upgrade before making the commitment, will automatically migrate your code to the current version, and will also streamline the process by providing automated merging and documenting where manual merging needs to be performed.

Model split

The application is split into three packages, or assemblies:

- Application Platform
- Application Foundation
- Application Suite

ISV AX 2012 R3 solutions will be re-baselined into the correct model.

Auto-migration using LCS Upgrade Service

A migration service that takes a model store as input, can complete the following tasks:

- Convert metadata into the format
- Re-baselines metadata, by moving and merging, into the right model



- Provides an estimation to understand the effort required to upgrade the solution
- Runs migration rules that auto-migrate parts of a solution
- Runs migration rules that inform developers what to manually fix by using TODOs
- Provides a one-box migration-ready VHD with your solution that is deployed into the Dynamics 365 for Operations format
- Optional: Automatically checks-in the upgraded solution into TFS online
- Optional: Automatically sets up nightly builds for the TFS online solution

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Manual migration

After developers have a one-box migration deployment ready, the application can be compiled by fixing the compilation errors in this order:

1. Application platform
 - Manually fix merge conflicts
 - Manually fix model split conflicts
 - Manually fix compilation errors
2. Application foundation
 - Manually fix merge conflicts
 - Manually fix model split conflicts
 - Manually fix compilation errors
3. Application suite
 - Manually fix merge conflicts
 - Manually fix model split conflicts
 - Manually fix compilation errors
4. ISV model
 - Manually fix merge conflicts
 - Manually fix model split conflicts
 - Manually fix compilation errors

After you have resolved all of the compilation errors, all assemblies will compile.

Next, ISVs must complete the following tasks:

1. Address guided code upgrade TODOs and code upgrade-specific best practice warnings
2. Replace deprecated controls, for example, ActiveX or find an alternative
3. Apply form patterns and sub patterns to all forms
4. Create data entities
5. Validate that all scenarios work in multiple browsers with different sizes for custom patterns
6. Write/run migration tests
7. Upload the solution to LCS for certification
8. Deploy to customers



Migration services

- ERP Upgrade Service
 - Marketing
 - Sales
 - Delivery



Migration Services

ERP Upgrade Service

The ERP Upgrade Service is for existing Microsoft Dynamics 365 for Operations customers who wish to move from a previous version of Dynamics 365 for Operations to the current version. Every upgrade opportunity must begin with completion of a Customer Profile, and then is followed by an Upgrade Assessment. The profiler sets the customer's expectations by aligning upgrade or migration options to the Dynamics 365 for Operations Roadmap. After receiving eligibility confirmation through the profiler, please then proceed with the Upgrade Assessment offer.

Through a series of workshops, the Upgrade Assessment evaluates the customer's current Dynamics 365 for Operations implementation including customizations and interfaces, and provides options and recommendations for the customer to move their solution forward to the current version. In order to realize the full value of new system capabilities, recommendations from the assessment may range from a technical code and data migration, to a full re-implementation for older versions of Dynamics 365 for Operations.

The Cloud Readiness Assessment is an optional add-on offer, to help the customer understand their readiness for the cloud and provides a high level plan for transition. The two-week engagement can be scheduled sequentially, or in parallel to the Upgrade Assessment. The benefit to the customer is a comprehensive plan for moving their Dynamics 365 for Operations solution to the cloud including estimated Azure sizing and costs.

1. Marketing > 2. Sales > 3. Delivery

Marketing

Since there are a number of possible upgrade paths, including on premise, on Azure, hybrid and possible deployment strategies, the Upgrade Assessment is offered as a lower cost engagement to help the customer understand the most appropriate version of Dynamics 365 for Operations to move to, and the roadmap to get there. Additionally, for customers interested in moving to the cloud, the Cloud Readiness Assessment option can help the customer to understand and prepare for that transition. To plan effectively for the Upgrade project, we recommended that you complete the Upgrade Assessment with the Cloud Readiness assessment (for customers interested in operating in the cloud), to understand the scope and recommended approach to move the customer's solution forward. Use this material to discuss these assessments with potential leads.

ERP Upgrade Service

Getting Started: Please complete a Profile for Customer Success, before selling the Upgrade Assessment offer.

Customer Success

Become familiar with the ERP Solution Overview and Sales Guide as part of your ramp up on this offer.

Overview and Sales Guide

Find these resources on the ERP Upgrade Service website

ERP Upgrade Service

Migration Services

Marketing (continued)

Upgrade Assessment for Microsoft Dynamics 365 for Operations Customer Presentation

Customer ready overview of the Upgrade Assessment for Microsoft Dynamics 365 for Operations. Includes a section on the Cloud Readiness Assessment.

Find these resources on the [ERP Upgrade Service website](#)

ERP Upgrade Service

Upgrade Assessment for Microsoft Dynamics 365 for Operations Datasheet

Customer-facing overview sheet for the Upgrade offer for Microsoft Dynamics 365 for Operations, focused on the Assessment, and includes a description of the optional Cloud Readiness Assessment add-on.

Sales

Engage your SSSP and Global Practices team to support Upgrade, Upgrade Assessment and Cloud Readiness discussions, leveraging this core content to better understand the current state and recommended project plan for an upgrade engagement.

Cloud Readiness Assessment for Dynamics 365 for Operations - Short Form SOW

Use this short-form SOW to append to the Upgrade Assessment SOW when adding a Cloud Readiness assessment to the Upgrade Assessment engagement.

Upgrade Assessment for Microsoft Dynamics 365 for Operations SOW
Standard Statement of Work Template

Upgrade for Microsoft Dynamics 365 for Operations SOW
Standard LCA approved template for Statement of Work

Delivery

Use this material and the tools that are available in Lifecycle Services during an Upgrade Assessment engagement to understand both the functional and technical differences between the customer's current installation and the current version of Microsoft Dynamics 365 for Operations.

Cloud Readiness Assessment for Dynamics 365 for Operations Resourcing Sheet

Use this document to understand resource requirements for the Cloud Readiness Assessment engagement.

Cloud Readiness Assessment for Dynamics 365 for Operations WBS

Use as template as a basis for the activities required to deliver the Cloud Readiness assessment.

Migration Services

Delivery (continued)

Upgrade Assessment for Dynamics 365 for Operations Delivery Guide
Internal guide to define and document the delivery processes for the Up-grade Assessment for Dynamics 365 for Operations offer. Includes delivery guidance for the Cloud Readiness assessment.

Find these resources on the ERP Upgrade Service website

ERP Upgrade Service

Upgrade Assessment for Dynamics 365 for Operations Delivery Template Samples Packet

Use this collection of samples as a basis to complete the deliverables for the activities on the Upgrade Assessment engagement.

Upgrade Assessment for Dynamics 365 for Operations Project Plan Template

Use this template as a basis for the activities required for the Upgrade Assessment engagement.

Upgrade Assessment for Dynamics 365 for Operations Resourcing Sheet

Use this document to understand resource requirements for the Upgrade Assessment engagement.

Upgrade Assessment for Microsoft Dynamics 365 for Operations Engagement Guide

Internal document to provide guidance for the Upgrade Assessment Engagement. Includes section on Cloud Readiness.

Upgrade for Microsoft Dynamics 365 for Operations Engagement Guide

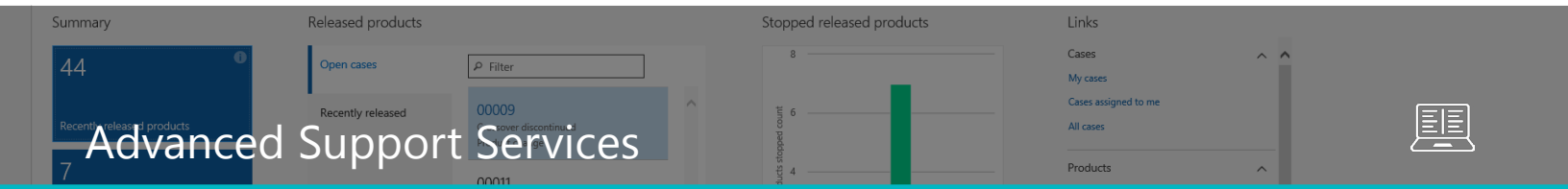
Internal document to support engagement model for the ERP upgrade and upgrade assessment



Advanced Support Services

- Upgrade
- ERP Solutions
- Implementation
- Microsoft Solution Planning Service
- Solution Architecture Assessment





Advanced Support Services

Advanced Support Services

Microsoft Services has a Dynamics 365 for Operations deployment strategy that will transform your operations, with flexible solutions tailored to your business.

Upgrade

Upgrading your current solution to the new Microsoft Dynamics 365 for Operations for the cloud helps you increase the speed of doing business. It enables you to make smarter decisions with access to real time insights and intelligence on nearly any device, anywhere. It enables you to redesign business processes faster so you can innovate and get quicker time to value. It also gives you the flexibility to grow at your own pace through choice and flexibility of the cloud to meet your business needs. Start planning to move your solution forward by letting our experts perform an Upgrade Assessment for your current Microsoft Dynamics 365 for Operations solution.

ERP Solutions

Microsoft Services has worked extensively with large organizations in manufacturing, retail, services sector, and public sector to implement solutions specific to their key drivers and business needs.

Implementation

Microsoft Services can help you effectively implement your end-to-end enterprise relationship management (ERP) solution based on Microsoft Dynamics 365 for Operations. Whether your business is in retail, manufacturing, distribution, professional services, the public sector, or another industry, our team of skilled and experienced Enterprise Architects, consultants, and support engineers can put Microsoft Dynamics 365 for Operations to work for you quickly, across all of your business operations and locations, fully integrated with your existing systems and business processes.

With a proven methodology that provides prescriptive guidance and deliverables across the phases of analysis, design, development, deployment, and operation, you can help ensure success throughout the technology implementation process.

Microsoft Solution Planning Service

Selecting your next-generation ERP solution is a major decision that requires a deep level of consideration. That deep consideration can help you to properly plan resources and actions that are required for success. SPS helps you to visualize how the total solution will fit in your organization's environment, and provides the information that you need to set the direction necessary for a successful implementation.

Summary

Microsoft Services will help you to plan and successfully upgrade your Microsoft Dynamics 365 for Operations Solution.

We provide:

- Experience and commitment
- Expertise and product knowledge
- Return on business value

Microsoft Services uses a standardized, proven implementation methodology called Sure Step to deliver four core offerings for envisioning, implementing, upgrading, and optimizing your solution.

Services



Advanced Support Services

Solution Architecture Assessment

As you work through the solution scoping, requirements, design assumptions, and implementation of your Microsoft Dynamics 365 for Operations Solution with your vendor of choice, you might determine that an added layer of review, risk evaluation, and quality check is just what you need to help make sure the success of your project.

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With Solution Architecture Assessment for Microsoft Dynamics 365 for Operations, Microsoft can work directly with you and your vendor to conduct independent reviews of your solution at discrete points during your implementation. Whatever your industry or specific business needs, Microsoft can help identify the areas for assessment, offer detailed prescriptions to help make sure that you meet your objectives, and—once the implementation is deployed—help you sustain optimal solution health and performance.

Feature	Description of service
Cloud Incidents	Unlimited Break-Fix support incidents for Microsoft Cloud Services
Response Time and Escalation	Less than 1 hour response times and escalation management for Severity A issues
Support on Behalf of End-Customer	Ability to open and manage support incidents on behalf of your customers
Services Account Management	Direct access to a team of SAMs who provide proactive guidance and support assistance for your most critical cases as well as help identify and execute your top cloud priorities and projects
Proactive Communications	Proactive communications about outages, releases, and programs
Technical Content and Training	Top-rated technical content and online training recommended by Microsoft
Cloud Consults	Architecture guidance for deployment, migration, and Cloud API implementations
Roadmap Webinars	Roadmap webinars on the latest technologies and releases
Cloud Optimization Analysis	A cloud optimization analysis that helps you accelerate cloud adoption and identify growth opportunities



AppSource

- Partner led trial
- Trial offer code



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AppSource provides a single destination for business you to discover, try, and acquire line-of-business SaaS apps. It simplifies app discovery, making it easy to find top business solutions for your industry from Microsoft and select partners—including exclusive apps. With AppSource, apps, you can build on what they have, adding new capabilities to your existing business applications.

Partner led trial

With Partner led trials, you can request a free trial from the ISV before you buy purchase the app, then work with a trusted Microsoft partner to implement your new solution.

To request a trial, visit the AppSource page and find your app by searching or refining by category, industry, or product. Select the app of your choice, click on the "Request trial" button, and submit your request.

Trial offer code

Existing Microsoft Dynamics AX customers or Partner organizations can access the new Microsoft Dynamics 365 for Operations with a 90 day try offer code.

Options for sign-up:

- Existing Office 365/Organization tenant
 - Global Admin must complete sign-up process
 - Create new Office 365/Organization tenant
- Send email to DAXCF@microsoft.com
- Bring your own Azure subscription
- Deploy unlimited Demo and/or Developer/Test environments

Summary

Find the right app for your business needs. With 230 apps, AppSource help business users easily find and evaluate apps from our partners

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Microsoft Dynamics 365 for Operations