MS Dynamics 365 Online – Upgrading and Customization

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INTRODUCTION

Dynamics 365 is a customer relationship management (CRM) business solution in the cloud that will help unify your business, from data and people, to processes. It drives sales productivity and marketing effectiveness by enabling better decision making and improving customer relationships using AI-driven workflows. It touches all aspects of a business, from sales, marketing, and service to talent and finance and operations, by connecting your data, applying artificial intelligence and driving the digital transformation of your organization.

Moving to a cloud CRM can seem like a daunting task. But with AI, social, mixed reality and mobile capabilities coalescing, rapid business innovation can be powered only with a mega move to the cloud.

REASONS TO MOVE TO DYNAMICS 365 ONLINE

Change can be hard; not to mention intimidating. But it's also important to think long-term. Here's a look at some of the top benefits of moving from MS Dynamics 365 on-premise to online:

Infrastructure–
Upgrading from on-premise to online not only frees up your IT team from the constant and time-consuming need for hardware and software management and upgrading, but puts this key responsibility on Microsoft. This ensures that there will be no downtime due to updates and troubleshooting; plus the added benefit of Microsoft managing the infrastructure and offering round the clock support.

Cost cutting–
Not having to purchase, maintain, upgrade, patch and repair hardware and software also means savings thousands of dollars. Maintaining servers on-premise translates into hiring a team that will be constantly required to manage the servers. The servers also need replacements every few years, which means more expenditure. On the contrary, MS Dynamics 365 Online comes for a flat monthly rate, while managing the entire system on its own, and ensuring they are up to date, at no extra cost.

Security–
Every organization's priority is security of their data and systems. Unfortunately, there is a misconception that on-premises is safer than on cloud – however, this is just that – a misconception, and nothing more. In fact, it's quite the opposite. Microsoft's full-time monitoring and anti-hacking capabilities are to reckon with, and one that on-premise systems cannot offer, even with onsite IT teams. Microsoft constantly improves its security tactics, is proactive with anticipating threats, and executes daily backup of systems for all around security.

Disaster recovery–
Even a small disaster can have serious impact on how a business survives and recovers. Online deployment safeguards a business's data and system environments, and can get the business up and running much faster than on-premise deployment can.

Mobility–
The ability to work on the fly is the order of the day. Business leaders and employees must have the power to access their data or work from any location and at any time; a facility that on-premise solutions cannot offer, but online can.

Speedy and shorter implementation–
The fact that the software can be used online, and not from the hardware, makes online deployment a quicker process in comparison to on-premise, saving time and effort.

Upgrades–
Upgrading on-premise system can be a time-consuming and expensive task. It's also a responsibility that needs to be shouldered by the in-house IT team. Online system, on the other hand, manages upgrades and updates smoothly and automatically, without the hassles of downtime and no extra costs, ensuring that business carries on seamlessly.

THINGS TO CONSIDER BEFORE UPGRADING

❖ **Multiple upgrades during the first time –**
When you decide to upgrade to the cloud, a direct jump will not be possible. If you are in a 2013 version of the on-premise CRM, you will first have to upgrade to the next immediate version, and then to the next, and so on, till you upgrade to the latest on-premise version. This is an unavoidable step in order for all your customization and solutions to move to the cloud version.

❖ **Out of the box (OOB) configurations work best –**
This mind sound counterproductive; however, off the shelf OOB configurations leverage the features that Dynamics CRM provides as a platform, and when moving to the online environment, all these features migrate automatically and work smoothly without needing any changes. The good thing here is even if a feature malfunctions in the upgraded version, Microsoft's support team will immediately jump in and fix the issue.

❖ **Avoid unsupported customizations –**
Even if an unsupported customization gets you an ecstatic reaction from the customer, the truth of the matter is that during an upgrade these very "wow" factors become bottlenecks for upscaling many CRM instances. For example, hosting custom web pages can cause problems, which are completely preventable if you use HTML-based web resources instead. Similarly, making modifications to the Dynamics database can lead to grave issues, derailing your opportunity to use legit tools and resources for the upgrade process. Hence, DO NOT suggest unsupported customizations.

❖ **Use Web-API –**
Microsoft has stressed in all its documentation about the deprecation of Organization Service. It's now important to evolve to Web API for your form scripts, web resource development, and integration of CRM with external applications. Avoid outdated technologies like SOAP-based services when you ready yourself for the next move.

❖ **Plugins –**
In Dynamics 365 online, your plugins must be registered in Sandbox, which, in the on-premise version, can be switched to "None". When you upgrade to the online version, working plugins the old way will cause problems; hence you have to ensure that your plugins work in Sandbox mode before you take the big plunge.

CUSTOMIZATION OF DYNAMICS 365 SOLUTIONS

Microsoft Dynamics 365 has powerful customization capabilities. It comes with an outstanding Integrated Development Environment (IDE) that provides total control to build and test most system changes. Customizations, however, can be used to fulfill special requirements, which both administrators and users can handle flexibly.

❖ For customizations, your teams will need:

- The right/privileges to make changes (based on security role and permissions)
- Understanding of the business process
- Familiarity with the application architecture
- A structured methodology for implementation

❖ The following customizations can be done on Dynamics 365:

- Customization of forms, views and charts
- Customization of the schema
- Automation using workflows and dialogs
- Customization of reports and dashboards and creating web resources

Let us take a look at some of the customization options in Dynamics 365 online:

❖ Entity customization –

While customizing entities you can add fields to entities, change the schema and create custom entities. An entity can also be defined as an activity entity.

❖ Field customization –

What entity is to a table, field is to a column in a database table. There are two types of fields – System fields (out-of-the-box fields that cannot be deleted but can be modified to some extent) and Custom fields (fields that are built within the system and can be modified and deleted). There are many ways in which an administrator can customize a field, such as defining a field's name, data type, requirement level, searchability, security, and auditing. A field created in one entity is not available in other entities

❖ Advanced field customization –

Since a field created in one entity is not available in other entities, you can use Option Sets, which is a field type similar to a pick list. Creating a global option set enables you to use this set in multiple entities without having to create them every time. Options sets allows users to add or delete items from lists. Another advanced field customization is the Calculated fields, which enables you to display calculated fields on a form. Calculated fields are like Roll-up fields that allow you to calculate across child records.

❖ Form customization –

Dynamics CRM form customization allows you to modify forms to show only those fields that are required. Ideally, modifications should be made using a solution and not via the form option.

CONCLUSION

Microsoft's focus is evidently on its online version. Moving to the cloud is, hence, a matter of "when" and not "if". Even if you feel that you are not ready for an immediate upgrade to the cloud, figuring out a timeline is a great way to start, so that your teams and your business is prepared for the eventuality. Rest assured, the change will be for the best.

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