

Are you ready to upgrade to Dynamics 365 V9 on-premises?

With the V9 upgrade, there are some major benefits of moving to Dynamics 365 on-premises sooner rather than later. Moving with your technology will always benefit your organization's flow. Key benefits of making the transition in early 2019 include:

REDUCE ORG IMPACT

When you make the move to Dynamics 365 (D365) V9 on-premises, there is low to no infrastructure maintenance necessary. This includes servers, database backups, security, etc. In addition, by making this move, it will be easier to stay up to date with future releases.

In the future, Microsoft intends to keep upgrades to "low impact", which means they'll be less painful than in the past. Overhead may also be lower.

MAXIMIZE FEATURE UTILIZATION

When you make this move, you will have access to all features and product advancements. If you are using CRM on-premises now, and don't make the move, you will not have access to the functionality being released. While Microsoft is focusing on driving organizations online with upgrades occurring twice per year in April and Oct., on-premises users will still be supported and be able to upgrade once per year in Oct. with new enhancements.

STAY AHEAD

Keeping updated with upgrades is pertinent to staying ahead of the curve. Timing is EVERYTHING. **An Upgrade Diagnostic will help you to understand when the time is right for your team and organization.** The decision to upgrade and when will depend on the results of the Upgrade Diagnostic. Ledgeview's experts will help you consider your whole process through a thorough business analyzation before making the transition to ensure a successful outcome.

MAKE TRANSITIONS EASIER

While you may not be ready to move online yet, D365 V9 on-premises is a good option for CRM on-premises users who want to make the change gradually or at least begin to see its potential. The more you keep up, the easier it is to evolve with upgraded technology. We recommend reaching out soon to explore your options.

IMPROVE USER ADOPTION

If you don't invest in CRM as an organization, how can you expect your employees to? When you keep up with upgrades, you engage your users easier and keep them feeling invigorated. Showing this sort of movement will help you show that your company is changing with the times, and improving over time.



Gold Cloud Customer Relationship Management



Let the experts at Ledgeview help

Contact us to get started
with your upgrade

Key considerations for upgrading to Dynamics 365 V9 on-premises:

CLEANER TRADITIONAL USER INTERFACE

- Reduced White Space
- Text/Label Wrapping
- Standardized Font and Font Sizes throughout Forms
- Low/No Infrastructure Maintenance (Servers, Databases, Back-ups, Security, etc.)
- “Low impact” upgrades will become even easier
- Lower Overhead

NEW UNIFIED USER INTERFACE (UUI)

- Provides the same experience no matter how you access (Mobile, Web, Outlook App)
- New Timeline Control: List of Activities, Posts, and Notes in Single List (Replaces the Social Pane from the Traditional Interface)

NEW MOBILE APP

- Utilizes the Unified User Interface (UUI)
- Faster and More Robust (than Current Mobile App)

IMPROVED DYNAMICS 365 FOR OUTLOOK APP

- More stability than Current App
- Accesses the New UUI when opening the CRM Record within Outlook

NEW FEATURES

- Multi-Select Picklist
- Push Button “Actions” within the Business Process Flow
- Virtual Entities: Looks like the Entity is within CRM, but the Data resides within the Source System

6 easy steps to determine what version of Dynamics you currently are using:

1. Navigate to the Office 365 Admin portal
2. Select the Admin icon for Office 365
3. Select Admin Centers in the Menu
4. Select Dynamics 365
5. Select the Org you wish to review
6. Select Updates, then your current version will appear on the right in a light gray shaded box

Take the stress out of your upgrade with Ledgeview

Is now the right time for my org to upgrade?

There’s no one answer to this question. The best way to know is to move forward with an Upgrade Diagnostic. This way, you will know what time is best for your organization to upgrade while identifying potential complications and preventing your system from breaking. However, across the board, it is always beneficial to follow the technology and stay on track with upgrades.

By upgrading, you are able to take advantage of the full capabilities, increase user adoption and client retention, and much, much more.

