

## DYNAMICS 365 L4L UPGRADE QUESTIONNAIRE

This information will help Covenant prepare a project scope, schedule and budget for your D365 upgrade.

### VENDOR INFORMATION

Are you under a current SA or EA agreement? *circle one*      Yes   /   No

Do you already have a vendor that you purchase licenses through?      Yes   /   No

Are you currently using Office 365 for Exchange and/or Active Directory? \* *check all that apply*

Office 365 for Exchange

Active Directory

### CRM VERSION

What version of CRM are you on?

Which currencies do you have installed?

Which language packs do you have installed?\*

How many active users do you have?

How large is your database?

How large are your attachments and email attachments tables?

Do you already have a current Azure subscription?      Yes   /   No

Do you already have SharePoint?      Yes   /   No

### REQUIREMENTS SUMMARY

Total entity count (in use):

Custom entity count:

Please check any and all Processes and Customizations you have:

Workflows

Processes

Actions

Business Process Flows

Plugins

Assemblies

JavaScript

Do you have the source code for your Plugins and Assemblies?      Yes   /   No

Do you have any business rules?      Yes   /   No

Do you have any SSRS reports using T-SQL?  
Yes   /   No

Do you have the source code for these reports?  
Yes   /   No

Do you use any managed 3<sup>rd</sup> party solutions?      Yes   /   No

If yes, please indicate what will be brought over:

The **entire** 3rd party solution brought over? (A compatible version is required\*)

Or just a **portion** of the third party solution brought over?\*

Do you have any integrations?      Yes   /   No

If yes, do you need our assistance with upgrading those integrations? \*      Yes   /   No

### TRAINING

Will you require any training? \*      Yes   /   No

\*These items could potentially increase your project cost.

Once you have completed this form, please submit a copy to [David Friedrichs](#) and [Mike Busby](#).