



# TrellisPoint

*The CRM Experts*

MICROSOFT DYNAMICS  
ON-PREMISE TO CLOUD  
MIGRATION ENGINE

A photograph of a man in a dark blue suit and striped tie sitting at a desk. He is holding a smartphone in his hands and looking at it. To his left is a laptop, and to his right is a white coffee cup on a saucer. The background is slightly blurred, showing what appears to be a bookshelf.

**DO YOU FEEL STUCK WITH YOUR  
OUTDATED, ON-PREMISE CRM SYSTEM?**

- **Functionality limitations**
  - Lacks latest Microsoft capabilities including PowerBI, Power Automate, PowerApps and more
  - Often limited to use on an in-office network or through VPN access
  - Limited ability to upgrade/update old on-premise licensing model
- **Lack of support**
  - Relies on in-house hardware, software, security and IT support
  - Manual software updates and patches, backups and performance monitoring
    - Delayed or unavailable software updates



# SOLVE THROUGH OUR EASY MIGRATION ENGINE



Our team has done the work ahead of time to help you migrate your data from on-premise to cloud-based Microsoft Dynamics 365 quickly and efficiently:

- **Minimize costly manual labor**

We've pre-mapped all out-of-box fields in both systems to cut migration time in half

- **Avoid data loss during migration**

We can also match and create new fields to ensure all your custom data gets moved accurately

- **Customize to your process needs**

We'll collaborate with you to clean up old data, configure functionality improvements, and design automated workflows to fit your business process





# WHY MICROSOFT DYNAMICS 365 FOR SALES?



Eliminate on-premise pains and do more with Microsoft Dynamics 365 for Sales, the leading solution for salesforce automation, marketing and customer service.



## DO BUSINESS ANYWHERE

Move from on-premise to the cloud for on-the-go accessibility from any device — no in-office network or VPN access required.



## INTEGRATE SEAMLESSLY

Many popular business applications and tools are native Microsoft platform integrations, meaning you can connect to Office 365, marketing, ERP and more through a single interface.



## GET DATA LITERATE

Leverage robust, real-time dashboards to make better informed, data-driven decisions — empowered with the latest Microsoft capabilities.



## AUTOMATE WORKFLOWS

Replace tedious manual tasks with automated sales, marketing & customer service processes using tools like PowerBI, Power Automate and PowerApps.



## SECURE YOUR DATA

Trust industry-best security features and set information access controls to protect your data, in compliance with GDPR, FINRA, HIPAA, SOX and many more.



## STAY UP TO DATE

Focus on running your business, not your software, with free, automatic system upgrades, performance monitoring and reliable support.



[www.trellispoint.com](http://www.trellispoint.com)



1-888-719-0248



[sales@trellispoint.com](mailto:sales@trellispoint.com)

# INTERESTED?

## TRY A 30-DAY FREE TRIAL

*Migrate up to 10,000 of your business accounts and contacts from Microsoft Dynamics 365 on-premise to cloud-based Microsoft Dynamics 365 for Sales – at no cost or obligation.*



888.719.0248



[sales@trellispoint.com](mailto:sales@trellispoint.com)

Specializing in CRM systems since 1998, TrellisPoint helps you plan, implement, configure, customize, and deploy CRM strategies and solutions in your organization.

 **TrellisPoint**  
The CRM Experts