



DYNAMICS NAV - QUESTIONNAIRE

1. Is your NAV currently up to date on maintenance (If not the upgrade is not a straightforward process)
2. What version of Microsoft Dynamics NAV you are in? (Microsoft has stopped support for versions 2015 and older)
3. How many Microsoft Dynamics NAV sessions are you currently licensed for?
4. How many companies are currently in the Microsoft Dynamics NAV database?
5. Are you using any ISV addons in your current NAV? (You need to check the availability of ISV's support for the addon in newest version)
6. List all of the Third-Party Add-Ins currently implemented.
7. What is the current size of your database (GB)?
8. Do you want to upgrade your system with or without transaction history?
9. Have you done the Fit-gap analysis on your system with latest version of BC? (Click here to find the new features which might fill the gaps in your current NAV)
10. How many external/third party software integrations with your current NAV?
11. What is deployment type of your current environment? Online/On-premises
12. What is your preferred deployment for upgraded environment?
13. How many NAV applications server do you run for users?
14. What is your best lean business time for IT project implementation?
15. What are your major pain points in current system?



DYNAMICS CRM - QUESTIONNAIRE

1. Is your CRM currently up to date on maintenance (If not the upgrade is not a straightforward process)
2. What version of Microsoft Dynamics CRM you are in? (Microsoft has stopped support for versions 2015 and older)
3. ([Click here to find your support expiration](#))
4. How many Microsoft Dynamics CRM sessions are you currently licensed for?
5. How many organizations, business units are currently in the Microsoft Dynamics NAV database?
6. Are you using any ISV addons in your current CRM? (You need to check the availability of ISV's support for the addon in newest version)
7. List all of the Third-Party Add-Ins currently implemented.
8. What is the current size of your database (GB)?
9. Do you want to upgrade your system with or without transaction history?
10. Have you done the Fit-gap analysis on your system with latest version of D365 Sales/Customer Service? ([Click here to find the new features which might fill the gaps in your current CRM](#))
11. How many external/third party software integrations with your current CRM?
12. Have you integrated your CRM with any Marketing Automation tool?
13. What is deployment type of your current environment? Online/On-premises
14. What is your preferred deployment for upgraded environment?
15. What is your best lean business time for IT project implementations?
16. What are your major pain points in current system?