

Upgrade or Re-implementation?

BY PROFESSIONAL ADVANTAGE - [REDACTED] - 2 MINS READ

You are currently using Dynamics AX 2012, 2009, or even an earlier version; your extended support with Microsoft is about to end; your business is growing; technology is outdated; and internal processes are changing. It is time for an upgrade and [Dynamics 365 for Finance and Supply Chain Management](#) is the way to go.

When you start looking into your options, the question comes up:

“Is it an upgrade or re-implementation?”

Why consider Dynamics 365 Finance and Supply Chain Management?

Some of the benefits of moving to Dynamics 365 Finance and Supply Chain Management include:

- One version, meaning you always stay up to date with easy and frequent updates; no more big upgrades or reimplementation.
- New functionalities are constantly introduced by Microsoft with the option to choose and activate only what is relevant to your business.
- The web cloud-based system gives the flexibility to use the system across a greater range of devices with easy access from anywhere, at any time and no hassle of managing infrastructure.
- Complete business solution and Integration with Microsoft products - [Power BI](#), [Power Apps](#), [Office 365](#) and more.

An upgrade in real life

Professional Advantage have recently gone through the process of upgrading one of our existing clients from AX2012 to Dynamics 365 Finance and Operations. These are some key points of the project:

- The client was already using AX 2012 R3.
- It was not a heavily customised system, and only small changes to code were required to adapt to the new framework.
- We replaced a whole custom module for bank reconciliation by standard functionality.
- All historical transactions were retained.
- Some re-configuration was required to adapt processes to new framework for budgeting.
- Only training around new features was needed and very little disruption of end users.

Key benefits of upgrading

- Retain historical transaction data.
- Less involvement of users as this is a more technical process.
- Faster than re-implementing.
- Less re-training of users as most of the core processes are the same.

Benefits of re-implementing

- An opportunity to review the current data.
- Possibly re-design the current structure and processes.
- Provides the best opportunity to make the most of any new processes or features.

Conclusion

If you need to retain transactional history in the same instance, have a low customised system, and are in a relatively new version an **upgrade is a better option**.

However, if you want to re-design the current processes, review the quality of your data, still in an old version, or have customisations and ISVs that are no longer needed, a new implementation would be better for your company.

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UPGRADE