

# D365 Audit

Solution: ContosoCustomizations | Version: 0.0.1.205 | Publisher: Contoso AG  
Report created on 09/01/2026

## Management Summary

The assessment of the Dynamics 365 solution Contoso Customizations shows a fundamentally stable and functionally coherent solution with an elevated need for optimization. In total **35 relevant findings** were identified. None of these findings causes an outage today, but several affect operational risk, future maintainability, and the use of technologies Microsoft no longer recommends.

**The main areas for action lie in automation, technical modernization, and documentation quality:**

- 14 synchronous workflows with no visible filtering (performance risk). A synchronous workflow runs in real time and holds the user up until it finishes - not in the background when the system is idle. Without filtering it also starts on every change to the table, even changes the process has nothing to do with. Execution logic and scalability should be reviewed.
- 13 forms with an unusually high control count on the default tab (performance concern). Everything on the first visible tab is built as soon as the form opens. The more controls sit there, the longer it takes before the user sees anything - whereas Dataverse fills later tabs only when they are clicked.
- 4 relationships with cascade-delete risk on a custom side (mass-deletion exposure). With cascade delete, Dataverse removes related records automatically. Deleting a single record can therefore unintentionally delete hundreds more - without a prompt and without an easy way back. The risk of unintended mass deletions should be assessed.
- 3 JavaScript files using the Xrm.Page API, deprecated since v9, instead of formContext. Xrm.Page has been deprecated since version 9. The code still runs today, but Microsoft can remove the interface at any time - at which point every form script built on it fails at once. Migrating to the current formContext API is recommended.
- 1 field with the unchanged default prefix "new\_" instead of a dedicated publisher prefix. The prefix records who created a column. If the default prefix is left in place everywhere, it later becomes impossible to tell which solution a column came from, and splitting or handing over the solution means assigning every column by hand. Set a dedicated publisher for new columns; existing ones cannot be renamed afterwards.
- 20 business rules write field values without being documented. Business rules run invisibly inside the form. If a rule writes field values, it changes data without the user asking for it - undocumented, that later looks like a data error. The rule should be described, at minimum naming the field it sets.
- Documentation coverage is insufficient. In particular custom fields (15 %), custom entities (0 %), views (0 %) make future maintenance and further development harder.

Worth highlighting on the positive side: the low external dependency on third-party solutions (3.9%) as well as the high consistency of naming conventions (98.8% use of the solution's own publisher prefix).

**Recommended next steps:**

1. Assess and remediate the high-risk findings: Review cascade-delete relationships, synchronous workflows, outdated JavaScript implementations, then work through them by priority.
2. Modernize the automation landscape: Analyze the existing classic workflows and plan a step-by-step migration to Power Automate.
3. Establish a sustainable documentation baseline: Add descriptions for tables, fields, views, and processes as the basis for any later change and for handovers to third parties.
4. Define a technical quality standard: Introduce binding development guidelines for new customizations to avoid accumulating further technical debt.

In summary, the solution is in an operable state but needs targeted technical improvements to ensure long-term stability, maintainability, and upgradeability.

With 915 components and 39 custom tables this solution is large, but it appears functionally coherent (consistent naming, no clearly independent areas). The available data does NOT suggest splitting it - size alone is not a sufficient reason.

## Scope of the Assessment

| Component Type                  | Count |
|---------------------------------|-------|
| Entities                        | 45    |
| Fields                          | 493   |
| Views                           | 109   |
| Forms                           | 62    |
| Workflows/Processes             | 62    |
| of which Business Rules         | 40    |
| of which Business Process Flows | 6     |
| JavaScript Web Resources        | 8     |
| Global Option Sets              | 38    |
| Dashboards                      | 1     |
| Other Web Resources             | 1     |
| Sitemaps                        | 2     |
| Model-Driven Apps               | 2     |
| Email Templates                 | 4     |

## Solution Health Metrics

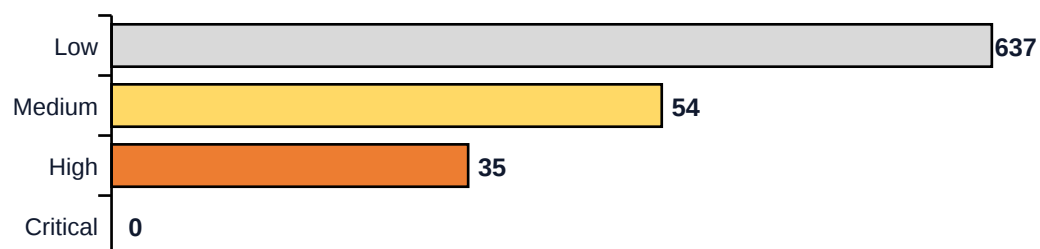
| Metric              | Value | Rating    | Detail                                                                                                                                                                                                                                     |
|---------------------|-------|-----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Dependency Exposure | 3.9%  | excellent | 33 references to 3 third-party solutions: LinkedInLeadGenIntegration (18), FieldServiceCommon (13), SolutionUpgradeInfrastructure (2) (3531 references to 55 Microsoft standard solutions; these are not counted as critical dependencies) |

| Metric                                   | Value  | Rating                    | Detail                                                                                                                                                               |
|------------------------------------------|--------|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Documentation Coverage (Custom Fields)   | 15.0%  | needs improvement         | 35 of 233 custom fields have an adequate description.                                                                                                                |
| Documentation Coverage (Custom Entities) | 0.0%   | needs improvement         | 0 of 4 custom entities have an adequate description.                                                                                                                 |
| Documentation Coverage (Views)           | 0.0%   | needs improvement         | 0 of 64 views have an adequate description.                                                                                                                          |
| Documentation Coverage (Workflows)       | 8.3%   | needs improvement         | 5 of 60 workflows/processes have an adequate description.                                                                                                            |
| Prefix Consistency                       | 98.8%  | excellent                 | 98.8% of custom components use the prefix "fab_"; 3 distinct prefixes in total.                                                                                      |
| Concentration of customisations          | 39.5%  | moderate attention needed | The three most heavily customised tables carry 39.5% of all 233 own columns across 22 tables: msdyn_project (34), Account (29), SalesOrder (29).                     |
| Own columns placed on forms              | 70.4%  | moderate attention needed | 164 of 233 own columns are placed on at least one form. The remaining 69 may be used in views, flows or JavaScript, which the export does not show.                  |
| Form performance risk                    | 40/100 | moderate attention needed | Risk score 40 of 100 across 43 forms (average 10, worst form 70). Breakdown: 2 poor, 3 moderate, 4 good, 34 unremarkable. Static estimate, not a measured load time. |
| Comment coverage of web resources        | 62.5%  | moderate attention needed | 5 of 8 of your own web resources are recognisably commented (at least 5.0% comment lines). Minified libraries and very short files are excluded.                     |
| Web Resource Orphan Rate                 | 44.4%  | moderate attention needed | 4 of 9 web resources are not referenced anywhere in this solution.                                                                                                   |

## Automation Overview

| Technology                   | Count | Share | Rating                    |
|------------------------------|-------|-------|---------------------------|
| Business Rule                | 40    | 58.8% | no action needed          |
| Classic Workflow             | 14    | 20.6% | moderate attention needed |
| JavaScript                   | 8     | 11.8% | excellent                 |
| Business Process Flow        | 6     | 8.8%  | no action needed          |
| Modern Flow / Power Automate | 0     | 0.0%  |                           |
| Plugin (registered step)     | 0     | 0.0%  |                           |

## Findings by Severity



## The ten most important measures

| Rule    | Severity | Count | What it means                                                                                             |
|---------|----------|-------|-----------------------------------------------------------------------------------------------------------|
| WF-003  | High     | 14×   | Synchronous/real-time workflow with no visible filtering - performance risk.                              |
| FRM-002 | High     | 13×   | Form has an unusually high control count (>15) on the default tab - performance concern.                  |
| ENT-009 | High     | 4×    | Relationship with CascadeDelete=Cascade on at least one custom side - mass-deletion risk.                 |
| JS-001  | High     | 3×    | JavaScript uses the Xrm.Page API, deprecated since v9, instead of formContext.                            |
| FLD-001 | High     | 1×    | Field carries the unchanged default prefix "new_" instead of a dedicated publisher prefix.                |
| BR-001  | Medium   | 20×   | Business rule writes field values but is undocumented - troubleshooting becomes costly.                   |
| WF-001  | Medium   | 14×   | Classic workflow (legacy) - Microsoft recommends migrating to Power Automate.                             |
| VW-001  | Medium   | 9×    | View has far more columns (>12) than useful for an overview.                                              |
| ENT-008 | Medium   | 4×    | Entity has an unusually high number of relationships (>15).                                               |
| VW-007  | Medium   | 2×    | View joins three or more further tables (link-entity) - every join costs runtime when the view is opened. |

## Entities and Their Automations

Overview of which automation logic is attached to which entity - useful for assessing potential impact before making a change.

| Entity             | Automations                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Account            | <ul style="list-style-type: none"><li>• JavaScript: fab_accounts.js</li><li>• Business Rule: Account - Auto-Insert Product Price List (FAB)</li><li>• Business Rule: Account - Customer Protection Rule (FAB)</li><li>• Business Rule: Account - Tax Properties (FAB)</li><li>• Business Rule: Accounts - Customer ID rule (FAB)</li><li>• Business Rule: Account - Relationship Type Rule (FAB)</li><li>• Business Rule: Account - Intermediary Rule (FAB)</li><li>• Business Rule: Accounts - X-Invoices Rule (FAB)</li><li>• Business Rule: Accounts - Leitweg ID Rule (FAB)</li></ul>                                       |
| Contact            | <ul style="list-style-type: none"><li>• JavaScript: fab_contact.js</li><li>• Business Rule: Contact - Salutation rule (FAB)</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Invoice            | <ul style="list-style-type: none"><li>• JavaScript: fab_invoice.js</li><li>• Business Rule: Invoice - Language Rule (FAB)</li><li>• Business Rule: Invoice - Email Rule (FAB)</li><li>• Workflow: Invoice - Mark Invoice as Paid</li><li>• Business Process Flow: Project Service - Invoice Process (Create)</li><li>• Workflow: Invoice - Set Office Management (Create)</li></ul>                                                                                                                                                                                                                                             |
| Lead               | <ul style="list-style-type: none"><li>• Business Rule: Lead - Set Euro as default currency (FAB)</li><li>• Business Rule: Default Values Lead</li><li>• Workflow: Lead - Close Lead as Lost</li><li>• Business Process Flow: Lead to Order Sales Process (Create)</li></ul>                                                                                                                                                                                                                                                                                                                                                     |
| Opportunity        | <ul style="list-style-type: none"><li>• Business Rule: Opportunity - Auto-Insert Product Price List (FAB)</li><li>• Business Rule: Opportunity - Set Est. Revenue and Customer Budget (FAB)</li><li>• Business Rule: Opportunity - Check contracting unit for quotes (FAB)</li><li>• Workflow: Opportunity - Close as lost</li><li>• Business Process Flow: Opportunity to Order Sales Process (Create)</li></ul>                                                                                                                                                                                                               |
| OpportunityProduct | <ul style="list-style-type: none"><li>• Business Rule: Opportunity Line - Calculate Customer Budget_FAB</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Quote              | <ul style="list-style-type: none"><li>• Business Rule: Quote - Contracting Unit Default</li><li>• Business Rule: Quote - Consultants Check (FAB)</li><li>• Business Rule: Quote - Auto-Insert Product Price List (FAB)</li><li>• Business Rule: Quote - Check contracting unit for quotes (FAB)</li><li>• Workflow: Opportunity - Update opportunity fields quo-opp (FAB)</li><li>• Workflow: Quote - Close as Lost</li><li>• Workflow: Quote - Activate Quote</li><li>• Workflow: Open closed Quotes</li><li>• Business Process Flow: Quote to Order Sales Process (Create)</li><li>• Workflow: Quote - Close as Won</li></ul> |
| QuoteDetail        | <ul style="list-style-type: none"><li>• Business Rule: Budget Type default</li><li>• Business Rule: Billing Method default</li><li>• Business Rule: Quote Line - Hide Budget Type (FAB)</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                               |

| Entity                       | Automations                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| SalesOrder                   | <ul style="list-style-type: none"> <li>• Business Rule: Order - Check payment terms (FAB)</li> <li>• Business Rule: Order - Invoice recipient message</li> <li>• Business Rule: Order - Auto-Insert Product Price List (FAB)</li> <li>• Business Rule: Order - Check contracting unit for project contracts (FAB)</li> <li>• Business Rule: Order - Direct Business (FAB)</li> <li>• Business Rule: FAB_Hide Overall Subscription Discount Field</li> <li>• Business Rule: Order - Language Rule (FAB)</li> <li>• Business Rule: Order - Email Rule (FAB)</li> <li>• Business Rule: Order - CSP E-Mail Rule (FAB)</li> <li>• Workflow: Order - Copy Invoice Recipients from Account (Create)</li> <li>• Business Process Flow: Order Sales Process (Create)</li> <li>• Business Rule: Order - Early Payment Discount Rule (FAB)</li> <li>• Workflow: Open closed Project Contracts</li> <li>• Workflow: Reactivate locked Project Contracts</li> </ul> |
| SalesOrderDetail             | <ul style="list-style-type: none"> <li>• JavaScript: fab_salesorderdetail.js</li> <li>• Business Rule: Budget Type default</li> <li>• Business Rule: Billing Method default</li> <li>• Business Rule: Order Line - Hide Budget Type (FAB)</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| msdyn_invoicelinetransaction | <ul style="list-style-type: none"> <li>• Workflow: Invoice Line Details - Update to Non-Chargeable</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| msdyn_project                | <ul style="list-style-type: none"> <li>• JavaScript: fab_checkprojectproperties</li> <li>• Business Rule: Project - Hide Budget Type (FAB)</li> <li>• Business Rule: Project - TN Email Rule (FAB)</li> <li>• Business Rule: Project - TN Process (FAB)</li> <li>• Workflow: Project - Set OM Contact (Create)</li> <li>• Business Process Flow: Project Service - Project Stages (Create)</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |

## Form Performance Risk

This assessment is a static estimate for each form. It examines how likely a form is to feel slow to the user. The value is derived from the components of the solution - nothing was measured and no load times are claimed. The scale runs from 0 (unremarkable/fast) to 100 (critical/slow).

**The solution contains 43 forms and reached an overall value of 40/100 (good).**

- Average form performance value: 10
- Highest form performance value: 70 (form Information (Project))
- 34 forms were unremarkable in the analysis.

The overall value is deliberately not an average: it is made up half of the average across all forms and half of the highest single value (here  $0.5 \times 10 + 0.5 \times 70 = 40$ ). A single critical form among forty unremarkable ones is what generates the complaints, and it would disappear in a plain average.

Action is recommended for the forms in the table below.

| Form (table)                                   | Score          | Findings and recommendation                                                                                                                                                                                                                                                                                                                                                   |
|------------------------------------------------|----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Information (Project)                          | 70<br>poor     | 11 subgrids on the form.<br>Timeline active - it loads activities on top of the form.<br>Combine the queries on load or run them in parallel, and check whether the data is already on the form. Sequential queries add up their waiting times.<br>Check whether the timeline is needed on this form. It loads activities on top of the form; on a later tab it does no harm. |
| Timesheet (beta) (Project)                     | 64<br>poor     | 20 subgrids on the form.<br>10 lookup fields in the immediately visible area - each needs its own resolution.                                                                                                                                                                                                                                                                 |
| Konto (Account)                                | 46<br>moderate | 5 subgrids on the first visible tab - each triggers its own query when the form opens.<br>Move subgrids that are not needed straight away to a later tab.<br>Dataverse then loads their content only when the user opens that tab.                                                                                                                                            |
| Bookable Resource main form (BookableResource) | 46<br>moderate | 6 subgrids on the form.                                                                                                                                                                                                                                                                                                                                                       |
| Projektinformationen (Order Line)              | 41<br>moderate | 15 subgrids on the form.                                                                                                                                                                                                                                                                                                                                                      |

### What these findings mean

**Subgrids:** A subgrid shows related records - for example every order belonging to an account. Dataverse fetches those records with a query of its own, on top of the single record the form itself displays. Opening a form with ten subgrids therefore means waiting for eleven queries instead of one, and those waiting times add up. This weighs most heavily on the first visible tab: its content is loaded immediately, whereas Dataverse fills later tabs only when the user opens them.

**Timeline:** The timeline collects every activity on a record - emails, appointments, notes, tasks. That is a query of its own, and it gets slower as the record accumulates history, while the form itself stays unchanged. A form that loads quickly today can therefore feel noticeably sluggish after two years in production.

**JavaScript on load:** JavaScript attached to a form runs before the user sees anything. If that code fetches data, every query adds to the load time; if the queries run one after another rather than in parallel, their waiting times add up. A synchronous call is the worst case: the browser freezes while it runs and responds to nothing.

**Lookup fields:** A lookup field stores only a reference. Displaying the name of the related record means resolving that reference - once per field. Many lookup fields in the immediately visible area therefore mean that many resolutions on open.

**Business rules:** Business rules run in the browser: once on open and then on every change to a field they refer to. Individually they cost almost nothing; several on the same table become noticeable while typing.

**Business process flow in the form header:** A business process flow in the form header brings its stages and the fields they contain. Every additional stage increases what has to be built on open - and reduces how much the user can take in at a glance.

### Complexity hotspots among the tables

These tables carry the most customization. That is not a defect, but a change made there has a disproportionate reach - and these tables are the hardest to separate if the solution is ever split.

- **Tables with the most custom columns:** Project (34), Account (29), Order (29)

- **Tables with the most custom relationships:** SystemUser (17), Subscription (11), Lead to Order Sales Process (9)

*The following elements could not be taken into account in this assessment:*

- *Calculated fields (not contained in the export)*
- *Rollup fields (not contained in the export)*
- *Call chains spanning several JavaScript files (not reliably derivable from the export)*

## Portability of the solution

What stands in the way of moving this solution into another environment. All findings also appear in the detailed chapters - gathered here so the question is answered in one place.

### Import Prerequisites (required managed solutions)

Importing this solution will fail if any of these managed solutions is missing in the target environment or older than the version shown.

| Name                               | Version       | Referenced components |
|------------------------------------|---------------|-----------------------|
| ProjectService                     | 4.168.3456.2  | 1468                  |
| msdynce_Sales                      | 9.0.4.0076    | 748                   |
| msdyn_ProjectServiceCore           | 1.0.0.87      | 267                   |
| MicrosoftDynamicsScheduling        | 3.12.0.448    | 182                   |
| msdynce_Scheduling                 | 9.0.0.0       | 134                   |
| Active                             | 1.0           | 116                   |
| msdynce_ProductManagement          | 9.0.4.0066    | 93                    |
| msdynce_LeadManagement             | 9.0.4.0066    | 89                    |
| msdyn_TESA                         | 1.3.0.147     | 65                    |
| msdynce_Marketing                  | 9.0.4.37      | 32                    |
| BaseCustomControlsCore             | 9.0.2606.5012 | 31                    |
| msdyn_ProjectServiceCore_Patch     | 1.0.168.34562 | 27                    |
| MicrosoftDynamics_EventManagement  | 1.52.437.87   | 27                    |
| MicrosoftDynamics_Marketing        | 1.122.2010.0  | 27                    |
| ProjectServiceDeprecatedComponents | 4.106.0.58    | 26                    |
| LinkedInLeadGenIntegration         | 1.45.1134.0   | 18                    |
| msdynce_Service                    | 9.0.5.56      | 17                    |
| msdynce_AppCommon                  | 9.0.4.0066    | 17                    |
| DynamicsMKT_Forms                  | 1.2.437.75    | 16                    |

39 further managed solutions with fewer than 15 referenced components are not listed here - the complete list is in the Word and Excel report.

### What stands in the way of a move

**Prerequisites:** 3564 references to 58 other solutions must exist in the target environment. Largest: ProjectService (1468), msdynce\_Sales (748), msdyn\_ProjectServiceCore (267), MicrosoftDynamicsScheduling (182), msdynce\_Scheduling (134), Active (116).

No findings that would stand in the way of an import.

### Modernisation

Technology Microsoft has deprecated or no longer recommends. None of it stops working today - but each item has a successor, and the effort grows the longer it waits.

| Rule    | Severity | Count | What it means                                                                                                       |
|---------|----------|-------|---------------------------------------------------------------------------------------------------------------------|
| JS-001  | High     | 3×    | JavaScript uses the Xrm.Page API, deprecated since v9, instead of formContext.                                      |
| WF-001  | Medium   | 14×   | Classic workflow (legacy) - Microsoft recommends migrating to Power Automate.                                       |
| DEP-001 | Medium   | 1×    | Solution contains the deprecated Project Service Automation app - its successor is Dynamics 365 Project Operations. |

## Change Auditing

3 of 45 tables have auditing enabled. Column-level flags only take effect while the table itself is audited, and they default to "on" - a table without auditing records nothing even if its columns are flagged. Whether auditing is enabled for the environment as a whole is not part of a solution export and must be checked separately.

| Table            | Auditing | Affected columns                                                                                                                                                                                                                                                                                                                                                |
|------------------|----------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| fab_subscription | Yes      | 16 audited columns: ExchangeRate, ImportSequenceNumber, OverriddenCreatedOn, OwnerId, OwningBusinessUnit, TransactionCurrencyId, fab_billingcycle_opt, fab_name, fab_price_mny; <b>excluded (11)</b> : CreatedBy, CreatedOn, CreatedOnBehalfBy, ModifiedBy, ModifiedOn, ModifiedOnBehalfBy                                                                      |
| InvoiceDetail    | Yes      | 6 audited columns: fab_chargeenddate_dat, fab_chargestartdate_dat, fab_chargetype_opt, fab_salespriceperperiod_mny, fab_salespriceperperiod_mny_Base, fab_subscriptionid_ref; <b>excluded</b> : fab_cspid                                                                                                                                                       |
| msdyn_project    | Yes      | 40 audited columns: OwnerId, fab_BookedHoursNew, fab_Circle, fab_CustomerspecificTNprocess, fab_CustomerspecificTNprocessMulti, fab_ProjectClass, fab_ProjectControllingCheckStatus, fab_ProjectEndReminder, fab_ProjectNumber; <b>excluded (7)</b> : fab_BookedHours, fab_Name, fab_OMContact, fab_SystemUser, fab_forecasted_calc, msdyn_overallprojectstatus |

The remaining 42 tables are not audited. 304 of their columns carry the column-level flag, which has no effect there. The full table-by-table breakdown is in the Word report.

# Detailed Findings

Only artifacts with at least one finding are listed. A full inventory, including the unremarkable artifacts, is contained in the Excel file of the consultant package.

## Entities

26 of 45 artifacts have at least one finding. A full inventory, including the unremarkable artifacts, is contained in the Excel file of the consultant package.

| Name        | Rule    | Sev.   | Note                                                                                                                                                                                                              |
|-------------|---------|--------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Lead        | ENT-009 | High   | 1 relationship(s) with CascadeDelete=Cascade on at least one custom side - deleting a record of this entity automatically deletes related records. See the German report or Excel for the exact related entities. |
| Opportunity | ENT-009 | High   | 1 relationship(s) with CascadeDelete=Cascade on at least one custom side - deleting a record of this entity automatically deletes related records. See the German report or Excel for the exact related entities. |
| Quote       | ENT-009 | High   | 1 relationship(s) with CascadeDelete=Cascade on at least one custom side - deleting a record of this entity automatically deletes related records. See the German report or Excel for the exact related entities. |
| Order       | ENT-009 | High   | 1 relationship(s) with CascadeDelete=Cascade on at least one custom side - deleting a record of this entity automatically deletes related records. See the German report or Excel for the exact related entities. |
| Order       | ENT-008 | Medium | 18 relationships (1:N/N:N) on this entity - exceeds the guideline of 15, review data model complexity.                                                                                                            |
| Contact     | ENT-008 | Medium | 30 relationships (1:N/N:N) on this entity - exceeds the guideline of 15, review data model complexity.                                                                                                            |
| Project     | ENT-008 | Medium | 17 relationships (1:N/N:N) on this entity - exceeds the guideline of 15, review data model complexity.                                                                                                            |
| SystemUser  | ENT-008 | Medium | 29 relationships (1:N/N:N) on this entity - exceeds the guideline of 15, review data model complexity.                                                                                                            |

## Fields

205 of 493 artifacts have at least one finding. A full inventory, including the unremarkable artifacts, is contained in the Excel file of the consultant package.

| Name                | Entity | Rule    | Sev. | Note                                                       |
|---------------------|--------|---------|------|------------------------------------------------------------|
| new_ContractingUnit | Lead   | FLD-001 | High | Schema name starts with "new_" (default publisher prefix). |

## Views

64 of 109 artifacts have at least one finding. A full inventory, including the unremarkable artifacts, is contained in the Excel file of the consultant package.

| Name                              | Entity       | Rule   | Sev.   | Note                                              |
|-----------------------------------|--------------|--------|--------|---------------------------------------------------|
| Aktive tatsächliche Transaktionen | msdyn_actual | VW-001 | Medium | 19 columns - exceeds the ~10-12 column guideline. |
| Consulting Productivity View      | msdyn_actual | VW-001 | Medium | 24 columns - exceeds the ~10-12 column guideline. |

| Name                                                  | Entity                    | Rule   | Sev.   | Note                                                                                                                                                                           |
|-------------------------------------------------------|---------------------------|--------|--------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Rückstandsprotokoll über Zeit- und Materialberechnung | msdyn_actual              | VW-001 | Medium | 13 columns - exceeds the ~10-12 column guideline.                                                                                                                              |
| Alle aktiven Projekte                                 | msdyn_project             | VW-001 | Medium | 19 columns - exceeds the ~10-12 column guideline.                                                                                                                              |
| Alle Projekte                                         | msdyn_project             | VW-001 | Medium | 13 columns - exceeds the ~10-12 column guideline.                                                                                                                              |
| Geschlossene Projekte                                 | msdyn_project             | VW-001 | Medium | 13 columns - exceeds the ~10-12 column guideline.                                                                                                                              |
| Meine aktiven Projekte                                | msdyn_project             | VW-001 | Medium | 13 columns - exceeds the ~10-12 column guideline.                                                                                                                              |
| Aktive Projekte meines Teams                          | msdyn_project             | VW-001 | Medium | 13 columns - exceeds the ~10-12 column guideline.                                                                                                                              |
| Verarbeitungsgenehmigungen                            | msdyn_projectappr<br>oval | VW-007 | Medium | The query joins 4 further tables (link-entity) - every join costs runtime when the view is opened. For large data volumes, check whether all joins are needed for the display. |
| Zeiteinträge zur Genehmigung                          | msdyn_projectappr<br>oval | VW-007 | Medium | The query joins 4 further tables (link-entity) - every join costs runtime when the view is opened. For large data volumes, check whether all joins are needed for the display. |
| FAB Billing Backlog for Products                      | SalesOrderDetail          | VW-001 | Medium | 16 columns - exceeds the ~10-12 column guideline.                                                                                                                              |

## Forms

32 of 62 artifacts have at least one finding. A full inventory, including the unremarkable artifacts, is contained in the Excel file of the consultant package.

| Name                        | Entity                                 | Rule    | Sev. | Note                                                                             |
|-----------------------------|----------------------------------------|---------|------|----------------------------------------------------------------------------------|
| Konto                       | Account                                | FRM-002 | High | 56 controls in the (assumed) default tab - performance risk, verify on the form. |
| Bookable Resource main form | BookableResource                       | FRM-002 | High | 28 controls in the (assumed) default tab - performance risk, verify on the form. |
| Kontakt                     | Contact                                | FRM-002 | High | 27 controls in the (assumed) default tab - performance risk, verify on the form. |
| Information                 | fab_leadtoquotesales<br>process        | FRM-002 | High | 38 controls in the (assumed) default tab - performance risk, verify on the form. |
| Information                 | fab_opportunitytoordersales<br>process | FRM-002 | High | 31 controls in the (assumed) default tab - performance risk, verify on the form. |
| Information                 | fab_quotetoordersales<br>process       | FRM-002 | High | 16 controls in the (assumed) default tab - performance risk, verify on the form. |
| Projektrechnung             | Invoice                                | FRM-002 | High | 35 controls in the (assumed) default tab - performance risk, verify on the form. |
| Information                 | msdyn_project                          | FRM-002 | High | 77 controls in the (assumed) default tab - performance risk, verify on the form. |
| Timesheet (beta)            | msdyn_project                          | FRM-002 | High | 74 controls in the (assumed) default tab - performance risk, verify on the form. |
| Projektinformationen        | Opportunity                            | FRM-002 | High | 19 controls in the (assumed) default tab - performance risk, verify on the form. |
| Projektinformationen        | Quote                                  | FRM-002 | High | 20 controls in the (assumed) default tab - performance risk, verify on the form. |
| Projektinformationen        | SalesOrder                             | FRM-002 | High | 35 controls in the (assumed) default tab - performance risk, verify on the form. |

| Name                  | Entity           | Rule    | Sev. | Note                                                                             |
|-----------------------|------------------|---------|------|----------------------------------------------------------------------------------|
| Projekttinformationen | SalesOrderDetail | FRM-002 | High | 27 controls in the (assumed) default tab - performance risk, verify on the form. |

## Workflows/Processes

56 of 62 artifacts have at least one finding. A full inventory, including the unremarkable artifacts, is contained in the Excel file of the consultant package.

| Name                                                  | Entity                        | Rule   | Sev. | Note                                                                             |
|-------------------------------------------------------|-------------------------------|--------|------|----------------------------------------------------------------------------------|
| Invoice - Mark Invoice as Paid                        | Invoice                       | WF-003 | High | Synchronous/real-time - verify manually whether the logic is a performance risk. |
| Opportunity - Close as lost                           | Opportunity                   | WF-003 | High | Synchronous/real-time - verify manually whether the logic is a performance risk. |
| Order - Copy Invoice Recipients from Account          | SalesOrder                    | WF-003 | High | Synchronous/real-time - verify manually whether the logic is a performance risk. |
| Opportunity - Update opportunity fields quo-opp (FAB) | Quote                         | WF-003 | High | Synchronous/real-time - verify manually whether the logic is a performance risk. |
| Quote - Close as Lost                                 | Quote                         | WF-003 | High | Synchronous/real-time - verify manually whether the logic is a performance risk. |
| Quote - Activate Quote                                | Quote                         | WF-003 | High | Synchronous/real-time - verify manually whether the logic is a performance risk. |
| Open closed Quotes                                    | Quote                         | WF-003 | High | Synchronous/real-time - verify manually whether the logic is a performance risk. |
| Project - Set OM Contact                              | msdyn_project                 | WF-003 | High | Synchronous/real-time - verify manually whether the logic is a performance risk. |
| Invoice - Set Office Management                       | Invoice                       | WF-003 | High | Synchronous/real-time - verify manually whether the logic is a performance risk. |
| Invoice Line Details - Update to Non-Chargeable       | msdyn_invoiceline transaction | WF-003 | High | Synchronous/real-time - verify manually whether the logic is a performance risk. |
| Open closed Project Contracts                         | SalesOrder                    | WF-003 | High | Synchronous/real-time - verify manually whether the logic is a performance risk. |
| Lead - Close Lead as Lost                             | Lead                          | WF-003 | High | Synchronous/real-time - verify manually whether the logic is a performance risk. |
| Reactivate locked Project Contracts                   | SalesOrder                    | WF-003 | High | Synchronous/real-time - verify manually whether the logic is a performance risk. |
| Quote - Close as Won                                  | Quote                         | WF-003 | High | Synchronous/real-time - verify manually whether the logic is a performance risk. |

## JavaScript Web Resources

8 of 8 artifacts have at least one finding. A full inventory, including the unremarkable artifacts, is contained in the Excel file of the consultant package.

| Name      | Rule   | Sev. | Note                                 |
|-----------|--------|------|--------------------------------------|
| Actuals   | JS-001 | High | Uses Xrm.Page (deprecated since v9). |
| Projects  | JS-001 | High | Uses Xrm.Page (deprecated since v9). |
| Approvals | JS-001 | High | Uses Xrm.Page (deprecated since v9). |

## Global Option Sets

37 of 38 artifacts have at least one finding. A full inventory, including the unremarkable artifacts, is contained in the Excel file of the consultant package.

Further findings in this category, summarised:

| Rule    | Severity | Count | Meaning                                                          |
|---------|----------|-------|------------------------------------------------------------------|
| OPT-002 | Low      | 37×   | Option set has no description on record.                         |
| OPT-003 | Low      | 2×    | Option set has an unusually high number of options (>20).        |
| OPT-004 | Low      | 1×    | Global choice list is not used by any field in this solution.    |
| OPT-005 | Low      | 1×    | Choice list with inconsistent capitalisation across its options. |

## Dashboards

1 of 1 artifacts have at least one finding. A full inventory, including the unremarkable artifacts, is contained in the Excel file of the consultant package.

| Name                      | Rule     | Sev.   | Note                                                                                                                                                                     |
|---------------------------|----------|--------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Sales Dashboard - PowerBi | DASH-002 | Medium | Power BI embedding with hard-coded IDs/URL (Noneapp.powerbi.com) - stops working after transport to another environment or tenant and sends data to an external service. |
| Sales Dashboard - PowerBi | DASH-004 | Medium | IFrame "IFRAME_SalesDashboard" with frame security disabled (Security=false) - the embedded page gains access to the surrounding form context.                           |

## Other Web Resources

1 of 1 artifacts have at least one finding. A full inventory, including the unremarkable artifacts, is contained in the Excel file of the consultant package.

Further findings in this category, summarised:

| Rule       | Severity | Count | Meaning                                                                                                          |
|------------|----------|-------|------------------------------------------------------------------------------------------------------------------|
| WEBRES-001 | Low      | 1×    | Web resource (non-JS) not referenced in any form/ribbon in this solution - either obsolete or a dependency risk. |

## Sitemaps

1 of 2 artifacts have at least one finding. A full inventory, including the unremarkable artifacts, is contained in the Excel file of the consultant package.

| Name                 | Rule        | Sev.   | Note                                                                                                                                                                                                                                                                 |
|----------------------|-------------|--------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| msdyn_ProjectService | SITEMAP-002 | Medium | 12 navigation item(s) point to custom tables not included in this solution (fab_certification, fab_certificationcatalog, fab_employeereference, fab_projectreporting, fab_skill ...) - after import into an environment without those tables the items lead nowhere. |

## Model-Driven Apps

2 of 2 artifacts have at least one finding. A full inventory, including the unremarkable artifacts, is contained in the Excel file of the consultant package.

| Name                | Rule    | Sev.   | Note                                                                                                                                  |
|---------------------|---------|--------|---------------------------------------------------------------------------------------------------------------------------------------|
| AppforOutlookModule | MDA-003 | Medium | App is not assigned to any security role - it will only appear for system administrators, regular users will not see it after import. |

| Name                 | Rule    | Sev.   | Note                                                                                                                                                                                                                                                                                                                                 |
|----------------------|---------|--------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| msdyn_ProjectService | DEP-001 | Medium | This solution contains the "Project Service Automation" app - Microsoft has deprecated the PSA app; its successor is Dynamics 365 Project Operations. New capabilities appear only there; migration planning should not wait for the shutdown. Source: Microsoft Learn, "Important changes (deprecations) coming in Power Platform". |

## Email Templates

1 of 4 artifacts have at least one finding. A full inventory, including the unremarkable artifacts, is contained in the Excel file of the consultant package.

Further findings in this category, summarised:

| Rule     | Severity | Count | Meaning                                                                                      |
|----------|----------|-------|----------------------------------------------------------------------------------------------|
| ETPL-001 | Low      | 1×    | Email template without a description - purpose unclear when several similar templates exist. |

## Relationships

41 of 130 artifacts have at least one finding. A full inventory, including the unremarkable artifacts, is contained in the Excel file of the consultant package.

Further findings in this category, summarised:

| Rule    | Severity | Count | Meaning                                                                                       |
|---------|----------|-------|-----------------------------------------------------------------------------------------------|
| REL-002 | Low      | 39×   | Relationship without a description - its business meaning is not apparent on handover.        |
| REL-001 | Low      | 28×   | Multiple custom lookups between the same pair of tables - suggests numbered repeating fields. |

## Appendix: Rules Checked & Limitations

### Severity Definitions

**Critical:** Breaks import/functionality, risks data loss, or uses already-removed functionality.

**High:** Officially deprecated with foreseeable removal, or a clear violation of supported APIs/practices.

**Medium:** Legacy/no longer recommended, but still works unchanged.

**Low:** Style/maintenance note with no functional risk.

### Glossary

**Core Rule Set (V1):** The set of component types and rules this version of the assessment actively checks (see the inventory table). Deliberately not an "everything" claim - see limitations below.

**Managed/Unmanaged:** Two solution states in Dataverse. Unmanaged = editable working copy (what this tool analyzes). Managed = read-only distribution package for production import.

**Publisher Prefix:** A short tag (e.g. "xyz\_") that distinguishes custom components from the Microsoft standard and from other solutions - a naming convention, not a technical requirement.

**Cascade Delete:** A relationship behavior: deleting a parent record automatically deletes all related child records too.

**Field-Level Security:** Additional access restriction on individual fields, independent of general record-level permissions.

**Dependency Exposure:** Share of referenced components that are NOT contained in this solution and must instead come from other (usually managed) solutions. Every such dependency has to exist in the target environment in a matching version - the higher the value and the more foreign solutions involved, the more effort and risk migration and deployment carry.

**Documentation Coverage (Custom Fields):** Share of your own (non-Microsoft) fields with a description on record. Important for handover to a new team or external consultants. Undocumented fields often require reverse-engineering of development or business logic.

**Documentation Coverage (Custom Entities):** Share of your own tables/entities with a description on record. At low values, it's often no longer clear why an entity was originally created.

**Documentation Coverage (Views):** Share of views (saved queries/list views) with a description on record. Without a description, it's later unclear whether a view is still needed or can be safely deleted.

**Documentation Coverage (Workflows):** Share of workflows, business rules, flows etc. with a description on record. Without a description, it's often no longer clear which business rule a process actually implements.

**Prefix Consistency:** Share of your own components carrying the most frequently used naming prefix. A low value suggests multiple publishers/teams developed independently of each other.

**Automation Mix:** Distribution of automation logic across different technologies. A high share of classic workflows is a modernization signal, since Microsoft recommends migrating to Power Automate.

**Legacy connector share among Power Automate flows:** Share of Power Automate flows using the legacy "Common Data Service (current environment)" connector instead of the current Microsoft Dataverse connector. Microsoft recommends migrating.

**Error handling in Power Automate flows:** Share of assessable Power Automate flows with at least one error branch. By default Power Automate runs an action only after its predecessor succeeded - without a branch for the failure case, a flow aborts silently on a fault and nobody is notified. Only flows that write or send data and contain at least five actions are assessed; for a short read-only flow, error handling is not a shortcoming.

**Form performance risk:** Static risk assessment for the load time of model-driven app forms, from 0 (unremarkable) to 100 (critical). It rates the parts that cause extra work when a form opens: subgrids on the first visible tab, embedded JavaScript with data queries, custom controls, the timeline and quick view forms. Ordinary fields deliberately carry little weight, because they are already part of the form document. This is a risk estimate, not a measured load time.

**Concentration of customisations:** Share of the three most heavily customised tables in all of your own columns. A high value is not automatically bad, but it shows that much of the logic hangs on a few tables: a change there has a disproportionate reach, and those tables are hard to separate when splitting the solution. A low value means customisation is spread evenly.

**Own columns placed on forms:** Share of your own columns placed on at least one form. Columns without a form placement are not necessarily redundant - they may be used in views, flows or JavaScript, which the export does not show. A low value is therefore not an error, but a good starting point for asking which columns are still needed.

**Comment coverage of web resources:** Share of your own JavaScript and HTML resources whose code is recognisably commented (at least 5% comment lines). Without comments, every later change has to reverse-engineer the code first - the most expensive part of a handover to a new team or an external consultant. Minified libraries and very short files are excluded: there the minifier strips comments, so their absence is not a shortcoming.

**Web Resource Orphan Rate:** Share of web resources not found referenced in any form or the ribbon of this solution.  
May mean obsolete, removable code - or use by another solution not visible here (dependency risk if deleted).

## Rule Reference (all rule IDs used in this report)

| Rule     | Note                                                                                                                                                         |
|----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|
| BPF-001  | Business process flow with only one stage - drives virtually no process, likely unfinished or obsolete.                                                      |
| BPF-002  | Business process flow with a large number of stages - hard to follow in the form header and costly to maintain.                                              |
| BR-001   | Business rule writes field values but is undocumented - troubleshooting becomes costly.                                                                      |
| BR-002   | Business rule with many condition branches - hard to test and maintain.                                                                                      |
| DASH-002 | Power BI embedding with hard-coded workspace/report IDs - breaks on environment or tenant change.                                                            |
| DASH-004 | IFrame with frame security disabled (Security=false).                                                                                                        |
| DASH-005 | Dashboard without a description.                                                                                                                             |
| DEP-001  | Solution contains the deprecated Project Service Automation app - its successor is Dynamics 365 Project Operations.                                          |
| ENT-003  | Entity has no description on record.                                                                                                                         |
| ENT-005  | Entity has no custom fields of its own.                                                                                                                      |
| ENT-007  | Auditing is enabled - storage/performance consideration for high record volumes.                                                                             |
| ENT-008  | Entity has an unusually high number of relationships (>15).                                                                                                  |
| ENT-009  | Relationship with CascadeDelete=Cascade on at least one custom side - mass-deletion risk.                                                                    |
| ENT-010  | Table has auditing enabled, but individual columns are excluded from it.                                                                                     |
| ENT-011  | Display name maintained in one language only (or DE/EN identical) although other tables in the solution carry bilingual names - a sign of poor localization. |
| ETPL-001 | Email template without a description - purpose unclear when several similar templates exist.                                                                 |
| FLD-001  | Field carries the unchanged default prefix "new_" instead of a dedicated publisher prefix.                                                                   |
| FLD-003  | Field has no description on record.                                                                                                                          |
| FLD-004  | Custom field is not used on any form included in this solution.                                                                                              |
| FLD-007  | Single-line text column at maximum length (>= 4,000 characters) - such values usually belong in a multiline text column.                                     |
| FRM-002  | Form has an unusually high control count (>15) on the default tab - performance concern.                                                                     |
| FRM-003  | Form has no description on record.                                                                                                                           |
| FRM-005  | Form is deactivated - invisible to users but still carried along.                                                                                            |
| FRM-006  | Main form not migrated to the updated form layout.                                                                                                           |
| JS-001   | JavaScript uses the Xrm.Page API, deprecated since v9, instead of formContext.                                                                               |
| JS-005   | JavaScript file has no description on record.                                                                                                                |
| JS-009   | JavaScript web resource likely orphaned (not referenced by any included form/ribbon).                                                                        |
| JS-010   | console.log/debugger statement found in the code.                                                                                                            |
| MDA-003  | Model-driven app with no security role assigned - visible to administrators only.                                                                            |
| MDA-005  | Model-driven app without its own SiteMap - navigation is not shipped with it.                                                                                |
| OPT-002  | Option set has no description on record.                                                                                                                     |
| OPT-003  | Option set has an unusually high number of options (>20).                                                                                                    |
| OPT-004  | Global choice list is not used by any field in this solution.                                                                                                |
| OPT-005  | Choice list with inconsistent capitalisation across its options.                                                                                             |
| REL-001  | Multiple custom lookups between the same pair of tables - suggests numbered repeating fields.                                                                |

|             |                                                                                                                  |
|-------------|------------------------------------------------------------------------------------------------------------------|
| REL-002     | Relationship without a description - its business meaning is not apparent on handover.                           |
| RIB-001     | Ribbon button binds a JS library that is not part of this solution - dead button or external dependency.         |
| SITEMAP-001 | Navigation item(s) removed from the standard navigation.                                                         |
| SITEMAP-002 | Navigation items point to custom tables that the solution does not contain.                                      |
| VW-001      | View has far more columns (>12) than useful for an overview.                                                     |
| VW-002      | View has no description on record.                                                                               |
| VW-005      | View has no explicit sort order defined.                                                                         |
| VW-006      | View is a content duplicate (identical FetchXML) of another view on the same entity.                             |
| VW-007      | View joins three or more further tables (link-entity) - every join costs runtime when the view is opened.        |
| VW-008      | View without a filter condition - loads every record of the table and slows down as data grows.                  |
| WEBRES-001  | Web resource (non-JS) not referenced in any form/ribbon in this solution - either obsolete or a dependency risk. |
| WF-001      | Classic workflow (legacy) - Microsoft recommends migrating to Power Automate.                                    |
| WF-003      | Synchronous/real-time workflow with no visible filtering - performance risk.                                     |
| WF-005      | Workflow/process has no description on record.                                                                   |
| WF-006      | Scope = Organization instead of a narrower scope.                                                                |
| WF-007      | Workflow is in Draft status/not activated.                                                                       |

## Deliberate Limitations of this Assessment

- This assessment performs no layer check and never accesses your Dataverse environment live.
- It covers the core set of components together with the extensions listed in the inventory, so it does not cover every component type Dataverse offers.
- For plugins, the assembly metadata is evaluated alongside the registration data: referenced libraries, target framework and addresses hardcoded in the code. The program flow inside the compiled code remains inaccessible - that would require a decompiler.
- Anything that only comes into existence in the running environment is out of reach: which user holds which role, how intensively a table is actually used, whether duplicate records exist, which audit settings are active in the Power Platform admin centre, and what reports or exports access. The solution export simply does not contain it.