

EWS Readiness Checklist for Dynamics 365 CE on-premises

A self-audit for IT and applications leads before booking an EWS Risk Assessment.

PHASED DISABLEMENT BEGINS
1 October 2026

PERMANENT SHUTDOWN
1 April 2027

**Dynamics 365
CE on-premises
(v9.x)**

Email Router ·
Server-Side Sync ·
Outlook profile

EWS

DISABLED 1 OCT
2026

Microsoft 365

Exchange Online ·
Microsoft Graph

Mailspan Graph bridge

AUTH

TRANSLATOR

AUDIT

Why this checklist exists

If you run Microsoft Dynamics 365 Customer Engagement v9.x on-premises with mailboxes in Microsoft Exchange Online, the Outlook server profile in your CE organisation today reaches Exchange Online over Exchange Web Services. When EWS is phased out from **1 October 2026** and shut down permanently on **1 April 2027**, that connection stops. Server-side synchronisation stops with it. Tracked emails stop appearing in record timelines. Appointments and contacts no longer sync between Outlook and CE. Queues stop receiving inbound email, which means case creation, complaints intake and shared-mailbox routing fail — usually silently. The system jobs queue then fills with thousands of failed server-side sync jobs, with no straightforward recovery path. To end users and to the business, CRM looks broken.

Microsoft has already removed the v8.x integration on **1 January 2026** and has been explicit about the destination:

"If you need server-side synchronization functionality, we recommend that you migrate to Dynamics 365 Online."

This checklist is written for the person inside the customer organisation who has to decide what to do about that, and who wants to think clearly before talking to any vendor. It is a working audit tool. It is deliberately useful whether or not you ever speak to Mailspan. If you take this document, fill in the boxes, populate the risk register and answer the procurement questions, you will be in a stronger position with every supplier you talk to next — including Microsoft, your existing partner, and us. That is the point.

Environment audit

Work through the items below in order. Each one has a one-line note on why it matters. If you cannot answer five or more of them without checking with someone, that is itself a finding.

Dynamics 365 CE version

- CE version is v9.1, v9.0, pre-v9.0, or unknown.
Mainstream support for v9.x ends 12 January 2027; pre-v9.0 estates have additional upgrade work before any migration path is viable.
- Last cumulative update applied (number and date).
CU level determines which fixes, security updates and migration tooling are available to you, and is the first thing any migration partner will ask for.
- An in-flight upgrade to v9.1 is on the change calendar (yes / no / planned date).
If a v9.1 upgrade is already scheduled, it changes both the timeline and the scope of any EWS remediation work.

Customisation depth

- Approximate count of plug-ins in the production organisation.
Plug-in volume is the single largest predictor of migration effort to Dynamics 365 Online.
- Approximate count of custom workflows.
Classic workflows often hide undocumented business logic and need decisioning before any cloud move.
- Approximate count of JavaScript web resources.
Form scripts written against older client APIs are a common source of post-migration regression.

- PCF controls in production (yes / no / count).**
PCF controls behave differently across versions and need explicit regression testing in any target environment.
- Any customisations directly call Exchange or EWS endpoints (yes / no / unknown).**
Custom code that calls EWS directly will break independently of server-side sync and must be inventoried separately.

Server-side sync configuration

- An Outlook (Exchange Online) server profile is in use (yes / no).**
This is the specific component that stops working when EWS is disabled in your tenant.
- Approximate count of mailboxes synced to CE.**
Mailbox count drives both licensing economics and the operational risk profile when sync fails.
- Folder-level tracking is enabled (yes / no).**
Folder-level tracking creates user expectations that disappear immediately when the connection breaks.
- Automatic record creation rules are active (yes / no / count).**
ARC rules are the primary mechanism by which inbound email becomes cases or leads; their failure is the most visible to the business.

Mailbox topology

- All mailboxes are in Exchange Online (yes / no).**
A pure Exchange Online estate is the scenario Microsoft's retirement notice is aimed at and where the cliff edge is sharpest.
- Hybrid Exchange is in use, with a count of remaining on-premises mailboxes.**
Hybrid topologies need a different remediation pattern and have different licensing implications.
- NHSmial tenant (yes / no).**
NHSmial brings DSP Toolkit obligations, additional governance, and constraints on what middleware is acceptable.
- Tenant region (UK / EU / US / other).**
Data residency and DPIA scope follow the tenant region and feed directly into procurement approval.

Email Router and queues

- Email Router is still in use (yes / no).**
The Email Router has been deprecated by Microsoft for several years; if it is still in production it is a finding in its own right.
- Approximate count of queues.**
Queues are how shared mailboxes, complaints inboxes and service desks reach CE; each one is a failure point on 1 October 2026.
- Inbound case-creation rules are active (yes / no).**
Case creation from email is the highest-visibility business process that breaks when server-side sync stops.

ISV and integration dependencies

- ClickDimensions is in production (yes / no / version).**
ClickDimensions has historic dependencies on the Outlook server profile path and needs explicit confirmation of its EWS posture.
- Resco is in production (yes / no / modules).**
Resco mobile and inspections products have their own sync layers that need separate assessment.
- Riva is in production (yes / no).**
Riva replaces or supplements server-side sync and may itself rely on EWS today; check the version and roadmap.
- Custom plug-ins or services authenticate to Exchange or call EWS endpoints (yes / no / list).**
Anything bespoke that talks to Exchange directly needs to be migrated to Microsoft Graph or retired.
- Any other ISV that may carry an EWS dependency.**
Document management, e-signature, telephony and archive products frequently embed EWS calls; an explicit inventory prevents surprises.

If you cannot answer five or more of these without checking with someone, that is itself a finding — start there.

Risk register template

Use the table below as the spine of your internal risk register. Every row needs a named owner and a target mitigation date. The dates that matter are **1 October 2026** (phased disablement) and **1 April 2027** (permanent shutdown).

| RISK | IMPACT | LIKELIHOOD | MITIGATION OWNER | TARGET DATE |
|---|--------|------------|------------------|-------------|
| CRM looks broken to end users. Tracked emails stop appearing in timelines. New activities do not post to records. | H | H | | |
| Appointments and contacts no longer sync between Outlook and CE. | H | H | | |
| Queues stop receiving inbound email. Case creation, complaints intake and shared-mailbox routing all fail silently. | H | H | | |
| Server-side sync errors flood the system jobs queue. Admins see thousands of failed jobs with no easy recovery path. | M | H | | |
| No first-party Microsoft replacement exists for on-premises CE → Exchange Online server-side sync. Microsoft's stated path is migration to Dynamics 365 Online. | H | H | | |

The register is only useful when each row carries a name and a date. Assign a single named owner per risk — not a team, not a function. Agree a target mitigation date for each row, anchored to 1 October 2026 for anything that protects production, and to 1 April 2027 only where you can demonstrate a credible migration cutover before that date. Review the register monthly between now and Q3 2026, weekly thereafter.

Decision matrix — the four credible responses

There are four responses to the EWS retirement that survive contact with procurement. Three are real options. One is listed for completeness.

| PATH | EFFORT | RISK | WHEN IT MAKES SENSE |
|---|--------|------|---|
| (a) Full migration to Dynamics 365 Online <i>Microsoft's recommended path</i> | High | Med | You were going to migrate within 18 months anyway, customisations are tractable, and the business case clears procurement before mid-2026. BTC3 30% discount applies (1 Jan 2026 – 31 Dec 2027). |
| (b) Move mailboxes back on-premises (Exchange Server SE) | Med | High | Almost never. Listed for completeness. Reverses the Microsoft 365 strategy and adds Exchange SE lifecycle and security obligations. |
| (c) AppID Allow List as a stopgap | Low | High | You have a confirmed migration cutover before March 2027 and need 4–8 months of breathing room. Not a destination — Microsoft has been explicit there are no exceptions past 1 April 2027. |
| (d) Mailspan Graph bridge <i>EWS-to-Microsoft Graph middleware</i> | Med | Low | Server-side sync needs to keep working past 1 October 2026, full migration is not realistic in your window, and you want a defined exit when you do migrate. |

If path (a) is realistic for you in the time available, it is the right answer. The bridge exists for organisations where (a) is not realistic, (b) is the wrong direction, and (c) is not a strategy.

Pre-engagement questions for procurement

Answer these internally before approaching any vendor — Mailspan or otherwise. The answers are the brief.

- 01 What is the earliest realistic Dynamics 365 Online go-live date, and who is the named programme owner?
- 02 Has the BTC3 30% discount been costed into the Dynamics 365 Online migration business case?
- 03 Who currently owns the EWS dependency on the corporate risk register?
- 04 Which change-freeze windows fall between now and 1 April 2027?
- 05 Has the Dynamics 365 customisation footprint been independently assessed in the last 12 months?
- 06 Which named ISVs are currently dependent on EWS or the Outlook server profile?
- 07 Is the mailbox topology purely Exchange Online, or does it include hybrid Exchange, NHSmail or another configuration?
- 08 Which DPIA, NHS DSP Toolkit, FCA or wider public-sector procurement constraints apply to any chosen remediation?
- 09 Has any vendor already proposed an AppID Allow List path, and who is the named owner of that decision?
- 10 Who is the named executive sponsor accountable for the 1 October 2026 cliff?

What to expect from a Mailspan assessment

A Mailspan EWS Risk Assessment is a fixed-price five-day engagement, delivered by a named consultant, ending in a written report and a live walkthrough. It is independent of any onward Statement of Work. It produces five Tier 1 deliverables.

- 1 A written environment audit covering CE version, customisation depth, server-side sync configuration, mailbox topology, hybrid Exchange status, and integration inventory.
 - 2 A risk register mapped to
 - 1 and
- October 2026**
- 1 , with named owners.
- April 2027**
- 3 A two-path recommendation — bridge or full migration — costed in bands, honest about which is right for the reader.
 - 4 A draft fixed-price Statement of Work for the recommended path.
 - 5 A live walkthrough with the reader's IT, applications and procurement leads.

The assessment is designed so that the report stands on its own. If the reader chooses to take it to another supplier, or to Microsoft directly under the AIM programme, the document is structured to be useful in that conversation.

Refund commitment. *If the assessment concludes you do not need the middleware bridge — for example, because a full Dynamics 365 Online migration is realistic in your window, or because your CE estate is already on a path that resolves the EWS dependency — the assessment fee is refunded in full.*

Book your EWS Risk Assessment

A 30-minute scoping conversation, then a fixed-price five-day assessment with a named consultant. Refunded in full if you don't need the bridge.

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