



WESTERN  
COMPUTER



# MICROSOFT DYNAMICS 365 BUSINESS CENTRAL UPGRADE STRATEGIES

Compare and contrast the options for upgrades available to Dynamics NAV users across different versions.

**Written by:**

Greg Williams

Dynamics Practice Manager

Western Computer

Available Business  
Central Upgrade  
Options for  
Dynamics NAV  
Users

# Microsoft Dynamics 365 Business Central Upgrade Strategies

## *Are you ready for Business Central? Do you know how to prepare?*

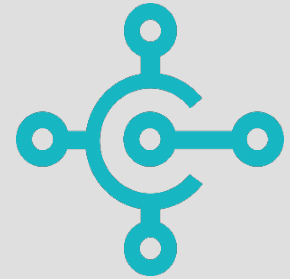
To take advantage of Microsoft Dynamics NAV's annual release cycle, your next upgrade needs to include the following considerations:

- MS released technology such as events, extensions, Power Automate (formerly Flow), Cortana and Power BI that add capabilities to BC without customizing the base code
- Rewrite required customizations into extensions using AL
- Eliminate customizations no longer needed due to business processes change or new functionality in NAV
- Evaluate ISVs and impact on upgrade path
- Choose ISVs that offer their solution as an extension
- Use a reporting tool to simplify your reporting strategy rather than modifying reports within NAV

## *Do you know your Dynamics Business Central upgrade options?*

Over the years, Dynamics NAV has evolved from a DOS system to Windows (the classic client) to now the modern Dynamics 365 Business Central application that is browser based and can be hosted internally or on the cloud.

Some companies are still utilizing the legacy Navision/NAV classic client – 2009 or older; in some cases, they have customized it to support their business processes. In other situations, they have just



*Considering  
an upgrade?*



Our Customer Success Managers are here to help you through this process. They can work with you to evaluate your current NAV instance, bring in subject matter experts to advise on different areas, and help you choose one of our upgrade offerings.

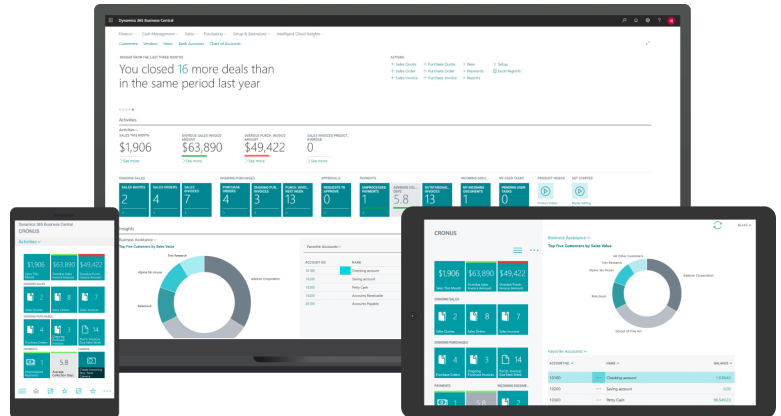
In addition to reviewing your current NAV database, Western Computer can help you determine your best path forward with Business Central. Today you have the choice of the Microsoft Cloud, partner hosted or on-premise.

Your Customer Success Manager will explain all options to you and help you determine the best strategy for your business.

waited to invest in the newer versions of NAV. Western Computer offers several options for customers that want to upgrade from their current version.

## Upgrading to Business Central

With the release of Dynamics 365 Business Central in 2018, Microsoft has provided two paths for companies to choose from moving forward. One path is Business Central On-Premise and the other is Business Central Cloud.



### Inline Code vs. Extensions

In past versions of Dynamics NAV, we customized the base code of NAV and then merged that code into new versions. We now use Extensions to customize Business Central without modifying the base code. Inline code was written in C/AL and extensions are written in AL. This will allow for easy, frequent updates at a minimal cost.

Extensions developed in AL are now the way to customize your Business Central. In a BC Cloud environment, they will allow you to receive automatic monthly updates from Microsoft. In a BC on-premise environment, they will make it easy for you to apply regular updates.

### Transitioning to the Modern Client

The Role Tailored Client that has been in place since 2009 is now being discontinued. Starting with the October 2019 version of Dynamics 365 Business Central, users will use either a browser or a mobile app to access Business Central.

### Cloud (SaaS) vs. On-premise or hosted

Business Central can be deployed on the Microsoft Cloud or On-premise. With the on-premise version, you can choose to install on your own servers or deploy hosted on Azure or another hosting option. If you choose on-premise hosted, you or your hosting company will have to manage the application availability, performance and updates.

The Cloud version of Business Central includes hosting from Microsoft involving a 99.9% financially backed Service Level Agreement.

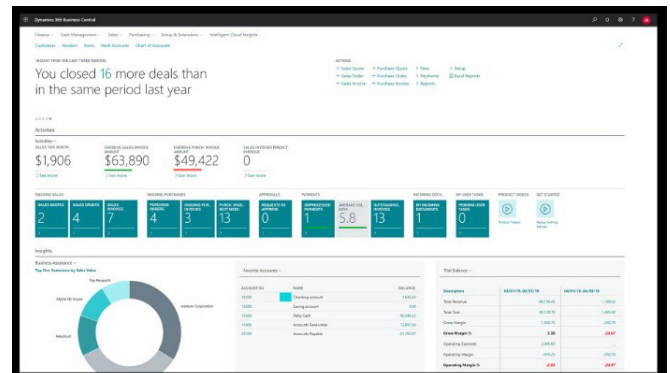
The graphic below shows a comparison of Business Central Cloud vs. On-premise:

Functionality	Cloud	On-prem/Hosted v15 and Later
Client Options	Browser or mobile app	Browser or mobile app
Updates	Mandatory and Automatic	Optional and manual
Database Access	API, Web services	Direct SQL, API, web services
Customizations	AL Extensions	AL Extensions
Availability	Now	Now

## Complete Upgrade

The **Complete Upgrade** approach involves a thorough upgrade of all Dynamics NAV objects including Reports. The main highlights of this approach are:

- Customizations are reviewed and converted to AL extensions in Business Central
- Forms are converted to Pages (web client and universal app)
- Reports are upgraded to work in Business Central



Western Computer's developers will first upgrade your NAV database to Business Central On-Premise, then you can choose to either use the system on-premise or migrate your database to the Microsoft Cloud. We will use the Microsoft Intelligent Cloud tool to replicate your data from on-premise to online, and then you can start using the Cloud version of Business Central.

The **Complete Upgrade** results in the least amount of work for the new Business Central users but requires the most amount of effort from Business Central developers to convert everything to the new version. This option also brings forward all of your data (which can be good and bad). For example, it is nice to have complete detailed transactional history, but your lookups might be slow. There is less opportunity to clean up data with this approach. All of this history may also limit your future decisions in Business Central, such as changing costing methods, posting groups, locations or other key configurations.

## WC Fresh Start Upgrade

The **WC Fresh Start Upgrade** simply upgrades your data and tables but no other objects (code, reports, forms, data ports). This approach is well suited for a company that wants to keep all of their detailed transactional history in NAV but feels like most of their customizations may no longer be required – due to new functionality in Business Central or changing business processes. Here is a typical approach to a **WC Fresh Start** Upgrade:

- Database (data only) is upgraded and delivered to client's test environment
- The client can review Business Central functionality with all of their data. We have found that reviewing with your data is a more efficient way to determine which customizations may no longer be required than reviewing with the Cronus database.
- Client works with a Western Computer consultant to determine which customizations are required based upon current business processes
- Required customizations are identified and redeveloped in NAV using the AL extensions

This upgrade requires significantly less effort from a NAV/BC developer than a Complete Upgrade. However, there is more time to be taken by the new Business Central user to review customizations and determine which ones should be moved into the latest version of Business Central.

## WC Cloud Start Upgrade

The **WC Cloud Start Upgrade** simply upgrades all of your master data and configuration data, but not transactional history. This approach is well suited for a company that wants to move to the BC Cloud in a cost-effective way with less user and consulting effort. The benefits of a **WC Cloud Start Upgrade** include:

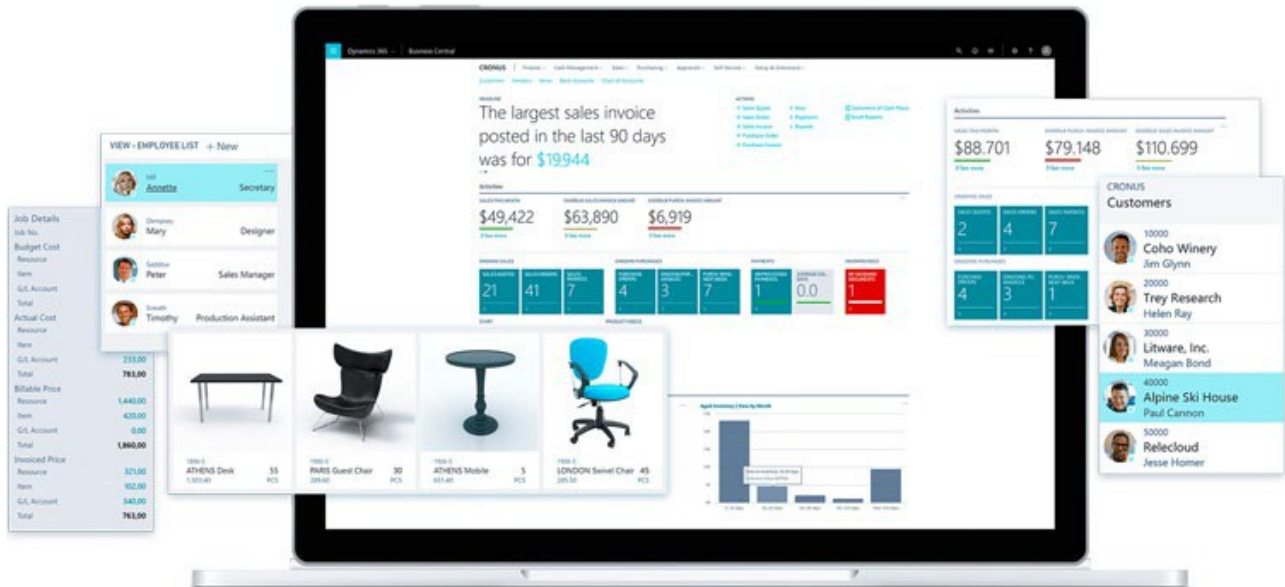
- The client can review Business Central functionality with all of their master data. Your users will not be required to export data from NAV and import into Business Central
- All of your setup data is preserved (for example posting setup, dimensions, default dimensions). Because there is no transactional history, you have the flexibility to change critical configurations if required (for example costing method, item tracking policy, and other key configurations)
- Client works with a Western Computer consultant to determine which customizations are required based upon current business processes
- Required customizations are identified and redeveloped in NAV using the AL extensions
- Open balances are migrated via Excel as part of the go live cutover process

This upgrade requires significantly less effort from a NAV/BC developer than a Complete Upgrade. However, there is more time to be taken by the new Business Central user to review customizations and determine which ones should be moved into the latest version of Business Central.

## New Start Upgrade

In this approach, we start with a blank Business Central database and import selected data. Limited history is migrated, eliminating existing custom data and custom code. In a **New Start Upgrade**, the following data can be migrated from your older NAV system:

- All master records (customers, vendors, items, GL Accounts)
- Open transactions (purchase orders, sales orders, open AP and open AR)
- Common configuration tables in NAV (posting groups, dimensions, unit of measure, number series)



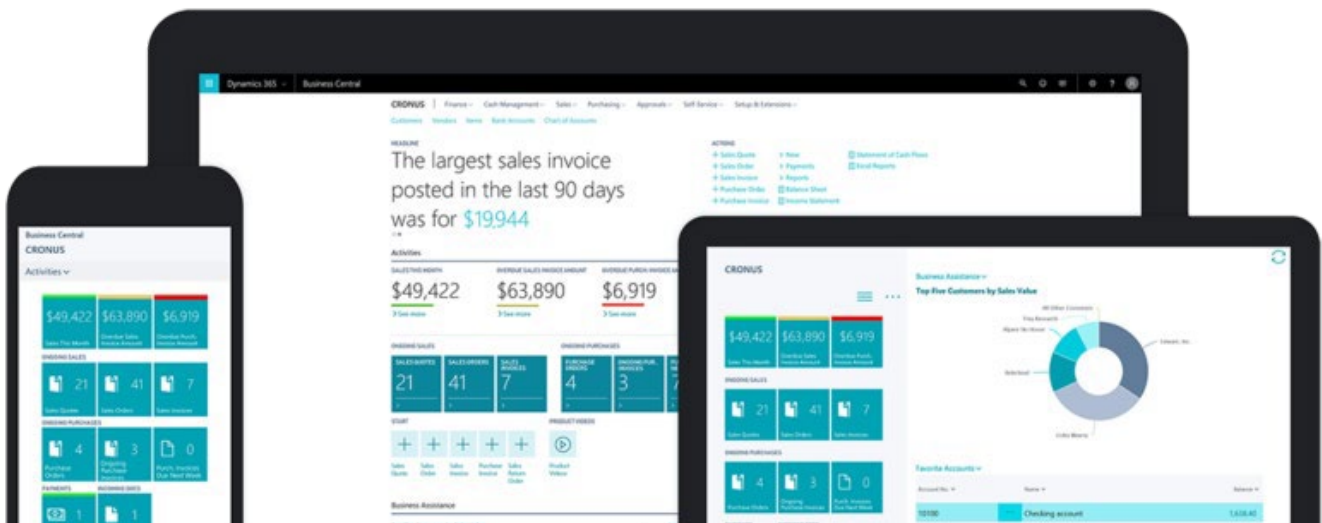
In a **New Start Upgrade**, some history is tough to migrate. This includes detailed history that links together the sub-ledgers in NAV or posted transactions. Business Central Cloud and On-premise provide different capabilities here, so Western Computer will work with you to find the right approach to bringing this data forward.

If detailed history is required, then Power BI can be utilized to store this data and Power BI reports can be embedded in your Business Central screens.

There are many advantages to this approach; they include:

- Any old corrupt data is left behind. This is especially useful for companies with inventory costing issues
- Old customizations can be eliminated or rewritten based upon newer business requirements
- You can redesign your Business Central system with a new chart of accounts, dimensions, posting groups

While this approach utilizes the least amount of programming time (primarily data migration and creation of document reports), it does require more time for the NAV users to define business requirements, assist in configuration, test transactions and implement the new system. However, customers that choose this approach often enjoy a lower cost of ownership due to their advanced knowledge of their new system and the ability to take advantage of automatic low-cost updates with Business Central.



## Conclusion

In conclusion, there are several different options for a NAV customer on an older version to upgrade to Dynamics 365 Business Central.

This table provides a summary of the various options available to Western Computer clients:

Upgrade Offering	Complete	WC Fresh Start	WC Cloud Start	New Start
<b>Description</b>	Traditional upgrade	Upgrade of data only	Upgrade of master data & configurations	No technical upgrade
<b>Data Migration</b>	Includes all history	Includes all history, all data is upgraded	All master data automatically upgraded	Limited historical data, master data and setups included
<b>Development effort</b>	High	Medium	Low	Low
<b>User Effort</b>	Little effort, simply learning new version	Medium	Medium	Most effort
<b>Consulting Effort</b>	Very little, training on new user interface	Medium	Medium	Most effort

[Contact us today](#) to speak to a Microsoft Dynamics expert and evaluate which approach would work the best for your instance.