

MICROSOFT DYNAMICS 365 BUSINESS CENTRAL UPGRADE STRATEGIES

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

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Are you ready to upgrade from Dynamics NAV?

Most Dynamics NAV users are aware that the natural progression path for them is to upgrade to Dynamics 365 Business Central (BC). The bigger challenges are knowing when you're ready to make the move and how to go about it.

How do I know if I should upgrade or start over?

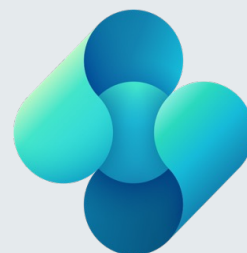
Let's start by discussing your business:

- How long ago did you implement your system?
- Do you feel like the system is working for you or are you working around your system?
- Has your business model changed since you initially implemented the system?
- Have you heavily customized your system?
- Do you have performance problems today?

These are just a few things that will help define your strategy moving forward.

Before we get into what's the best approach for your business, let's review what changed from Dynamics NAV to Business Central.

Microsoft introduced Business Central in 2018 as the successor to Dynamics NAV. Since then, the platform's planned lifecycle and licensing model have changed dramatically.



Considering an upgrade?



Our Account 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.

After your Account Manager reviews your current NAV instance, they will go over your Business Central migration options.

Today, you have the choice of the Microsoft cloud or on-premises. Together, you will determine the best strategy for your business.

Let's start with the lifecycle.

Before the Modern Lifecycle Policy, **Dynamics NAV followed the Fixed Lifecycle Policy**, which guaranteed **5 years of mainstream support** (feature updates, regulatory changes, bug fixes) and **5 years of extended support** (security updates only). After Microsoft introduced the Modern Lifecycle Policy, products like **Dynamics 365 Business Central** moved to a model of **continuous servicing**, where customers where customers receive consistent updates that make support seamless.

Aspect	Dynamics NAV (Fixed Lifecycle)	Business Central (Modern Lifecycle)
Support Model	Fixed ten-year window (5 yrs mainstream + 5 yrs extended) End date: January 2028	Continuous servicing, no fixed end date
Updates	Feature updates only during mainstream support	Twice-yearly release waves with ongoing improvements
Compliance and Security	Regulatory updates only in mainstream; security fixes in extended	Continuous compliance and security updates as long as current
Upgrade Requirements	Optional until support ends	Required to stay current for ongoing support
Customer Impact	Predictable long term stability, but limited innovation	Continuous innovation, but requires proactive upgrade planning

Now let's transition to the licensing model.

The move from **Dynamics NAV** to **Dynamics 365 Business Central** represents a shift from traditional perpetual licensing to a modern subscription model. NAV customers purchased licenses outright and paid an annual enhancement plan to add concurrent users along with reports, forms and code units through perpetual licensing, while Business Central customers subscribe per user per month, choosing between Essentials, Premium, or Team Member licenses. The key difference is that NAV was licensed for concurrent users, while Business Central is licensed for named users. This means team members cannot share licenses.

To maximize your benefit when upgrading to Dynamics 365 Business Central, you should consider the following:

- Adopting Microsoft innovations such as Copilot, AI, event-based triggers, extensions, Power Automate, and Power BI, which add capabilities to BC without customizing the base code
- Eliminating customizations no longer needed due to business process changes or new functionality in NAV
- Rewriting required customizations into extensions using AL
- Evaluating ISVs and their impact on the upgrade path
- Choosing ISVs that offer their solutions as extensions
- Using a reporting tool to simplify your reporting strategy rather than modifying reports in NAV

Do you know your 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 Microsoft's secure Azure cloud.

Some companies are still using the legacy Navision/NAV classic client from 2009 or earlier, often because they have configured it to support their business processes. Others have simply held off on investing in NAV in favor of waiting for a more substantial upgrade. Western Computer offers several upgrade paths for customers ready to move off 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-premises and the other is Business Central Cloud.

Base Code Modifications vs. Extensions

In Dynamics NAV, we configured the base code of the platform and then merged that code into new versions. In Business Central, we use Extensions to customize Business Central without modifying the base code. While inline code customizations in NAV were written in C/AL, Business Central's Extensions are written in the newer language AL. This allows for frequent and easy updates at a reduced cost.

Extensions developed in AL are the way to configure your Business Central system today. In a BC Cloud environment, they allow you to receive automatic updates from Microsoft. In a BC on-premises environment, they make it easy for you to apply regular updates.

Base Code Modifications vs. Extensions

The Windows Role Tailored Client that was in place from 2009 to 2018, is now 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 vs. on-premises

Business Central can be deployed on Microsoft Cloud or on-premises. With the on-premises version, you can choose to install on your own servers or deploy hosted on Azure or another hosting option. If you choose on-premises, you or your hosting company will have to manage the application availability, performance and updates. Unless there is some compelling reason to do this, we recommend the fully hosted software as a service version of Business Central.

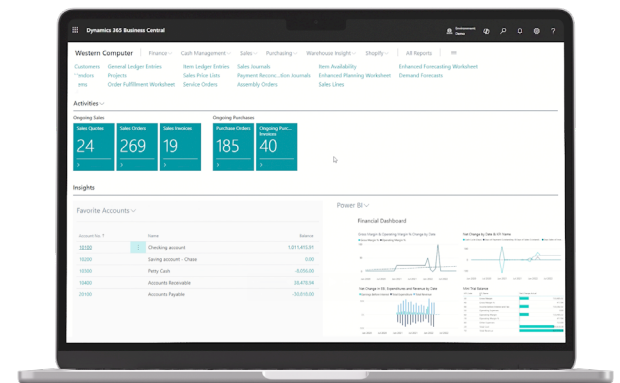
The graphic below shows a comparison of Business Central Cloud vs. Dynamics NAV:

Functionality	Cloud	Dynamics NAV 2018 and prior
Client Options	Browser or mobile app	Role Tailored Client, Browser, mobile app
Updates	Mandatory and Automatic	Optional and Manual
Database Access	API, Web services	Direct SQL, API, Web services
Customizations	AL Extensions	C/AL traditional code
ISV Selection	Full selection of ISVs	Full selection of NAV ISVs

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-premises 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 your data which can be good and bad. For example, it's 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 this history may also limit your future decisions in Business Central, such as changing costing methods, posting groups, locations or other key configurations. In addition, it can have an extra cost for the required storage you might need.

CUSTOM UPGRADE

The **WC Custom 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 feel like most of its 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 Custom 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

REIMPLEMENTATION

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 **Reimplementation**, the following data can be migrated from your older NAV system:

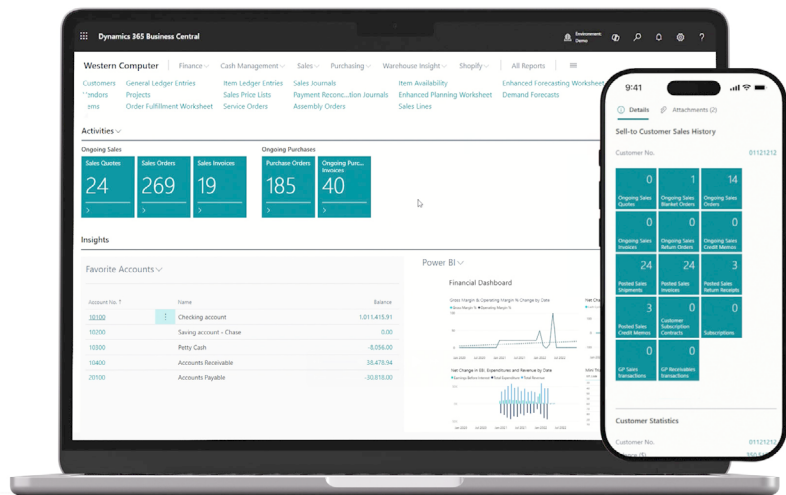
- All master records (customers, vendors, items, GL Accounts)
- Open transactions (purchase orders, sales orders, open AP and open AR)
- Common configuration tables in NAV (posting groups, dimensions, units of measure, number series)

In a **Reimplementation**, 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-premises 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 used to store this data, and Power BI reports can be embedded in your Business Central screens.

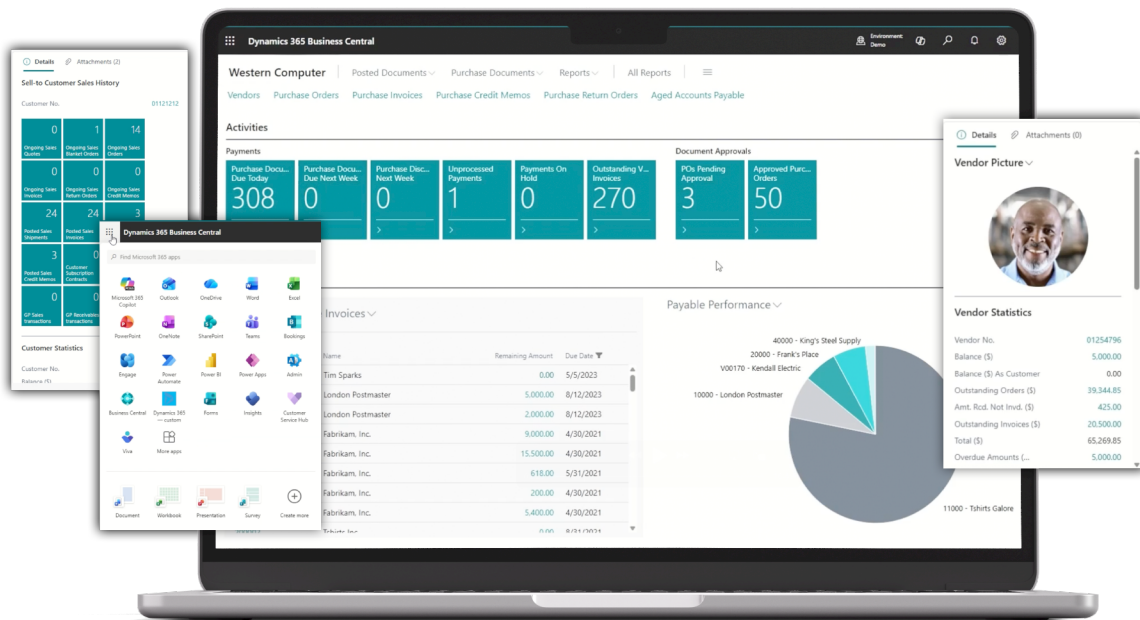
There are many advantages to this approach; they include:

- 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 uses 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 who choose this approach often reduce the number of modifications needed and can use Business Central in a more “out of the box” fashion.



YOUR NEXT STEPS

There are several different options for a NAV customer on an older version to upgrade to Dynamics 365 Business Central. If we go back to that list of original questions we discussed, it might lead you to a logical conclusion on the direction you should take for your business:

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

	Complete Upgrade	Custom Upgrade	Reimplementation
Business Model	Same as when you implemented Dynamics NAV	You might have customizations that are important to your business	Continuous servicing, no fixed end date
Performance	Dynamics NAV performs well without issues	n/a	Risk of poor performance due to issues with customization quantity or design
History	All history maintained	All history maintained	Master records only (customers, vendors, items)
Data Mitigation	Includes all history	Includes all history	Limited historical data, master data and setups included
Customizations	All customizations needed	Customizations are identified and client approval required for each to be moved	Customizations are developed on an as needed basis
Reports/Forms	All reports are converted	Only identified reports are converted	Reports are developed on an as needed basis
ISVs	All ISVs are maintained and moved forward	ISVs are evaluated to determine need moving forward	Requirements are gathered and ISVs identified to fill gaps as needed
Client Effort	Least effort. Just functional testing	Most effort. Evaluation with WC to evaluate all requirements and upgrade efforts	Client required for requirements gathering, conference room pilots, training and cut over activities
Development Effort	High	Low	Low
Cost	\$	\$\$\$	\$\$

RECOGNIZED BY MICROSOFT. TRUSTED BY NAV CUSTOMERS.

Western Computer is a multi-year finalist for Microsoft's Dynamics 365 Business Central Partner of the Year award and has been named to Microsoft's Inner Circle, a recognition given to the top 1% of Dynamics partners worldwide.

WHAT NAV CUSTOMERS SAY ON G2:



"We partnered with Western Computer after a disastrous experience migrating from NAV to Business Central with a previous vendor. From day one, the difference was night and day. Western didn't just pick up the pieces, they rebuilt our system the right way, with a level of professionalism and expertise that was clearly missing before."

– **Nick Ernst**, Manager at Exact Replacement Parts, via G2



"Our current system, Dynamics NAV 5, was highly customized and integrated throughout the rest of our enterprise systems such as our website, EDI, and extranet applications. Western was able to help us define a path forward, including helping us modernize and bring forward many of our customizations into Business Central. The open architecture of Business Central allowed us to quickly integrate with the rest of our enterprise applications, including supporting older systems. In effect, this project allowed us to put a new engine into an aging sports car. We will be able to modernize the rest of our enterprise around our new ERP."

– **Matthew Wilson**, IT Director, Accutech Data Supplies, via G2



WHY WESTERN COMPUTER?

You've seen the upgrade paths.

Here's why NAV customers pick us to help them get there.

- **We've done this since 1987.** Western Computer has nearly four decades of ERP and CRM experience, with more than 1,750 successful Dynamics implementations across North America.
- **We know this upgrade inside and out.** We've guided NAV customers through Complete Upgrades, Custom Upgrades, and Reimplementation. We've seen it all, and we'll tell you honestly which path fits your business.
- **We bring decades of industry knowledge.** Western Computer has helped distributors and manufacturers solve operational pain points for nearly 40 years.
- **We stick around after go-live.** Many of our clients have worked with us for a decade or more. Our [Managed Support Services](#) offering provides a dedicated support team so our customers can focus on their business.

Start your upgrade process today by contacting one of our Microsoft Dynamics experts. Together, you'll evaluate which approach would work the best for your instance.

