

3 things you need to know now about Dynamics 365 Business Central

3 things

YOU NEED TO KNOW

NOW

SERIES



Microsoft Dynamics 365
Business Central

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PART 1:

THE Basics



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1

Can I still continue to use, and purchase new users of Dynamics NAV?

Yes, it's just that the product is now called Dynamics 365 Business Central – it's essentially the latest release of Dynamics NAV. Provided that you have a current enhancement plan, you can continue to purchase extra users.

2

Do I have to move to the cloud?

No, Dynamics 365 Business Central will continue to be available as an On Premises deployment with perpetual licences plus an annual enhancement plan. It is also available as a SaaS (Software as a Service) public cloud deployment on Azure and also as a monthly subscription licence on your platform of choice – On Premises or private Cloud (on Azure).

3

We have lots of customisations to our Dynamics NAV On Premises implementation, can we take those customisations with us?

Yes, if you stay On Premises. However, when most customers upgrade, they take the opportunity to review if those customisations are still relevant. As Microsoft is improving the way customisations are delivered, now is the time to review what extra functionality is required. If you still need any customisations and want to go SaaS, it's highly likely that they can be redeveloped as AL extensions complete with the automated tests recommended for the regularly updated SaaS platform. (see Part 3: Customising for more detail)





4

Are Microsoft offering existing customers an incentive to move to Dynamics 365 Business Central?

Yes, there are a couple of different promotions. Dynamics 365 Business Central is licensed on a named user basis. So if you are an existing Dynamics NAV user (with a current Enhancement Plan) and you upgrade to Dynamics 365 Business Central On Premises, for every 1 concurrent user you will receive 3 named users. The cost of your Enhancement Plan stays the same. Or, if you are an existing customer upgrading to Dynamics 365 Business Central SaaS by 30 Jun '21, there is a 70% discount while you maintain your enhancement plan that reduces to 40% if your plan expires. Both discounts have an end date of 30 Jun '21. Or 12 months after the CSP licence starts, whichever is the later date. To qualify for these discounts you must have had a licence with an active enhancement plan prior to 1 Oct '18.

5

We're on an old version of Dynamics NAV how are we affected?

If you are using a version of Dynamics NAV 2013 to 2018, you can upgrade your licence to any version up to 2018 or move to Dynamics 365 Business Central. As of 1 Apr '19, Dynamics NAV 2009 customers won't be able to upgrade to Dynamics NAV 2018 and so will move straight to Dynamics 365 Business Central.

PART 2:

Upgrading



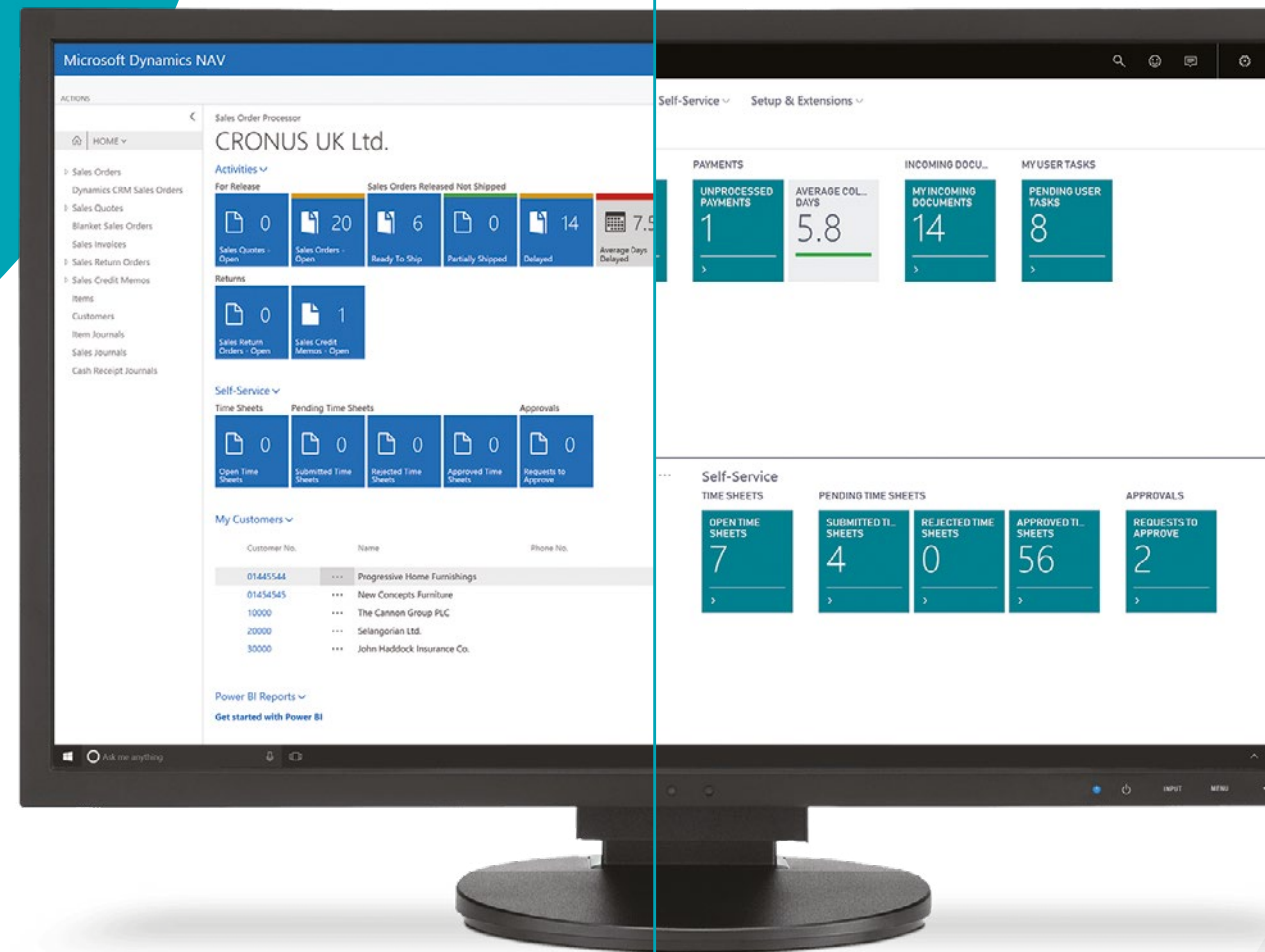
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With the launch of Dynamics 365 Business Central, effectively the next release of Dynamics NAV, we're seeing the biggest change to the Dynamics product line for many years.

Many of our customers are already making the move to Dynamics 365 Business Central and we've learnt a few lessons along the way. So, here's our top 4 tips on what to look out for when planning your move to Dynamics 365 Business Central.





1

A new User Interface

Dynamics 365 Business Central brings a fresh and modern user interface (UI) and new modes of working across role centres, lists, worksheets, transaction documents, or details pages (such as the customer card).

Users will need training on the new UI experience, navigation and productivity features such as filtering of lists and totals, customising pages, etc..

However, you can still use the current Windows Client¹ and generally the process for daily activities remains the same in Dynamics 365 Business Central as in Dynamics NAV 2013 + beyond, so users should not need much guidance. Depending on how old your current version of Dynamics NAV is, there may be new features introduced in later versions of Dynamics NAV & Dynamics 365 Business Central. Depending on the scope of the project, users may only need to be made aware of these changes OR may need training on how to use them.

¹Sometime in the next 12-24 months, it's expected that the Windows Client will disappear so the move to the new user interface (Web Client) is best practice but not mandatory yet.

2

Permissions & Roles

If you are upgrading from Dynamics NAV 2013 + beyond to Dynamics 365 Business Central On Premises then the Permission Sets and Roles will be exactly the same. However, if you are migrating from Dynamics NAV to Dynamics 365 Business Central Software as a Service (SaaS) then the standard permission sets are different – the former being based on function and the latter being based on role. In addition, many customers often tailor permissions and/or create custom permission sets to meet their specific business needs.

This leaves a choice to either select new permission sets for each user or export / import the existing permission sets. Either way, you need to make sure you have people who understand both permission sets and how they roughly translate as well as the information on what may have been changed from the standard set in Dynamics NAV. In line with some new functionality in Dynamics 365 Business Central, there are also a bunch of new tables that require additional permissions for a user to login that need to be added to any imported permission sets.

3

Licensing

Currently, if you make the move to Dynamics 365 Business Central SaaS you need to transition via Dynamics 365 Business Central On Premises. As a result, you will need both an On Premises licence and a SaaS licence (at no extra cost). Make sure your licensing partner gets these organised early on so it doesn't delay your implementation.

Functionality

With each release² of Dynamics 365 Business Central, Microsoft now publish a full list of new/updated features and capabilities:

- > Dynamics 365 Business Central release notes April 18:
[Launch Link External-link](#)
- > Dynamics 365 Applications release notes October 18:
[Launch Link External-link](#)

So users can see what new functionality they can use to their advantage.

But if you are an existing user of Dynamics NAV Version 4, 5, 2009, 2013, 2013R2, 2015, 2016, 2017 or 2018, how does the new functionality in Dynamics 365 Business Central compare?

Here at Technology Management, our consulting team rely on a rather weighty Excel spreadsheet of over 130 key areas of functionality and how they have changed over the last 9 versions of Dynamics NAV.

Some of the changes are optional and some are mandatory – see the mandatory changes to average costs and period comparison below – so again you need to make sure you have the expertise on hand to plan for the mandatory and decide on the optional.

Average Costs

If using Average Cost for Items then it may be necessary to set a value for the Average Cost Period field on the Account Period table (for the first record of each Accounting year), this needs to be the same as the value for the field Average Cost Period in the Inventory setup table.

This change is completed as follows;

- > Change the Average Cost Period on Inventory Setup to a different value (e.g. from DAY to MONTH), this triggers an update process.
- > Change it back to the original setting (e.g. Day), this triggers an update process.

The Accounting Period records should now be correct.

Period Comparison

Period comparison formula in Account Schedules work slightly different in Dynamics 365 Business Central. Instead of using the field 'Comparison Date Formula' (typically with a value of CY-12M), Dynamics 365 Business Central uses the 'Comparison Period Formula' field (typically with a value of FY[1]).

²Dynamics 365 Business Central has two major releases a year, typically Spring and Autumn. There are also monthly releases that deliver both fixes and new functionality.



PART 3:

Customisation



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The 2019 spring release of Microsoft Dynamics 365 Business Central is likely to be the most popular version of the Dynamics NAV dynasty to date. It's not just the increasing functionality that the product provides but also that it is the perfect middle ground between the historic C/AL modifications and the new Dynamics 365 Business Central extension-based platform

1

The traditional methods of customisation are changing

Microsoft define the move from C/AL modifications to new AL based extensions as a six-step process, but some of those steps are not a couple of minutes long. In most instances, moving to AL extensions will also involve a significant re-engineering exercise because of the need to take often decades of evolving C/AL modifications and turn them into something fit for purpose in the current day.

Clients typically want to take the opportunity to remove, rather than transfer, changes where they are no longer appropriate to their business. Similarly, clients are voting strongly to go with standard add-ons rather than re-write custom bespoke.

It's not unusual to see Dynamics 365 Business Central implementations that have 30+ extensions, some as small as a couple of page and table extensions. Others though can be tens, if not hundreds, of objects which make extensive changes to the way the system works.



2

Plan a migration path that suits your business, at a time that suits your business

There is no standard migration path that is right for everyone. What you need to do depends on your circumstances and how your business is progressing. The right thing to do is to get a plan for where you want your business to be in the next 2 to 3 years and to build your Dynamics 365 Business Central migration plan to properly support it.

This release of Dynamics 365 Business Central will be supported by Microsoft for five years plus meaning clients will have a period of time to slowly migrate their customisations to extensions, one by one rather than a big bang approach. Separating different requirements into separate discrete extensions means that they are more easily maintainable, transferable and can be enhanced/fixed individually. All of which reduces complexity of deployment and risk.

Clients might also choose to use extensions from ISV's and AppSource rather than custom extensions as more and more become available. When in the future they have reached the utopia of being completely extension based, their upgrade process can be completely script based if they remain on premise or, more likely, they move to Microsoft's SaaS Business Central platform.

Those that have the hardest decision are the users on Dynamics NAV 2018 which does support extensions but does not have anywhere near the number of events that Microsoft have put through all the core logic for Dynamics 365 Business Central Spring '19. That means you can deliver customisations via extensions on Dynamics 365 Business Central Spring '19 that couldn't be done on Dynamics NAV 2018.

Maintain the Windows Client for existing users

Dynamics 365 Business Central Spring '19 release is the last version of Dynamics 365 Business Central that supports the Windows client – the client most existing Dynamics NAV users love!

While moving to the Web client from the Windows client is a matter of preference, often experienced users, used to the Windows client, are struggling with some aspects of the Web client. Being able to look at the icons on the action bar in the Windows client, or browse through the 'Departments' menu when you're not quite clear about what you want, does enable you to find options you don't know or cannot remember what exactly they are called.

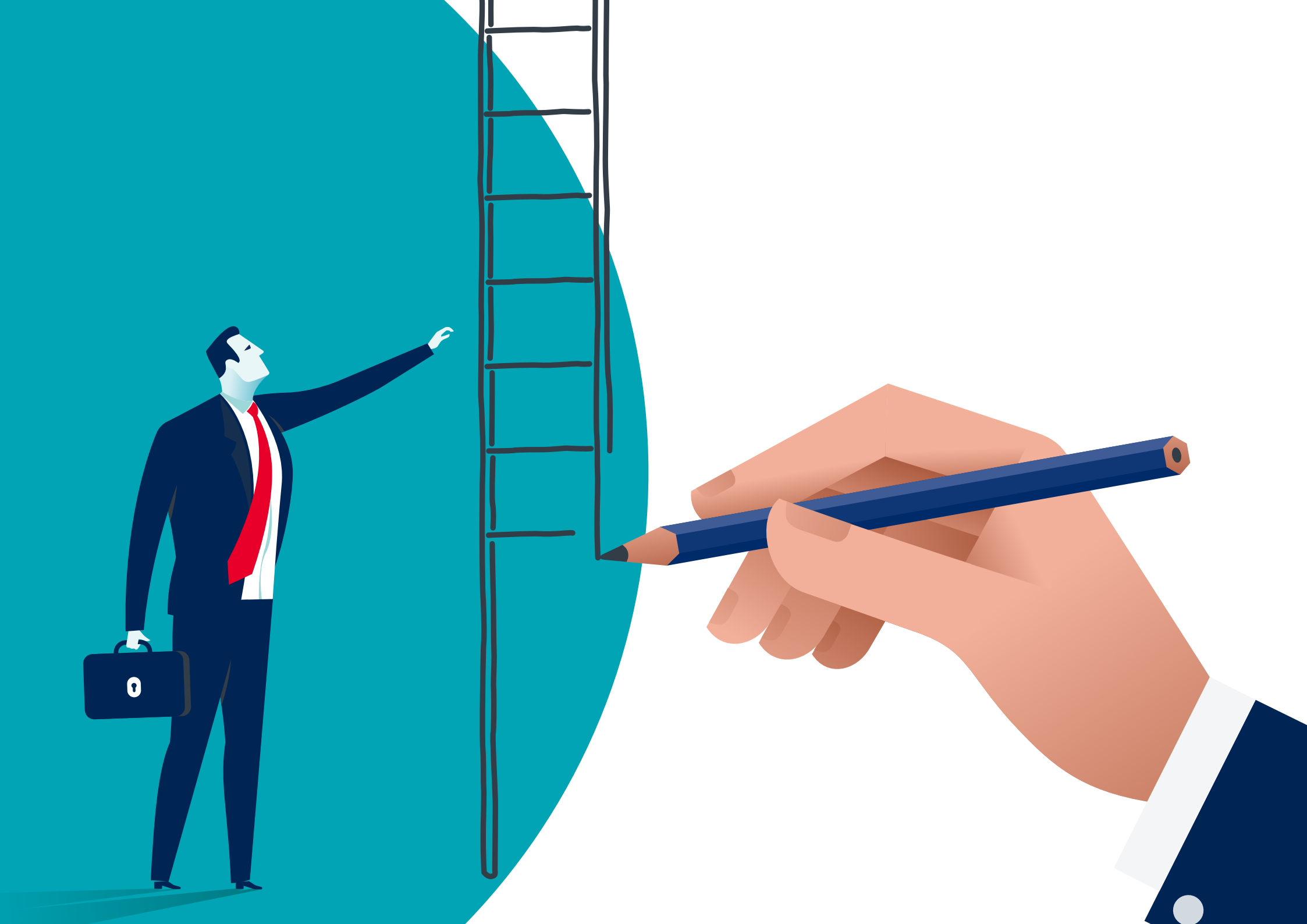
In contrast, new users to the system take to the Web client like ducks to water.

Summary

The process of both customising and upgrading your Dynamics solution through the beauty of 'Extensions' and third-party 'Apps' is becoming ever easier.

With the rapid pace of business and regulatory change we see in the 21st century, you need to be on right platform – Dynamics 365 Business Central Spring '19 release - to take advantage of all the new capabilities.

A smooth, undramatic move that supports your business objectives and makes you as efficient and competitive as possible. Talk to us soon to determine what that plan should be.



One solution. Complete visibility.



We help Manufacturing and Distribution transform their processes and operations with Microsoft Dynamics 365 Business Central (formerly known as Dynamics NAV), Dynamics 365 Customer Engagement (CRM) and Office 365. Having delivered over 6,000 successful projects, we've plenty of experience implementing business systems, Microsoft Dynamics 365 solutions and the technical infrastructure to support them.

We are a Microsoft Gold Certified Partner and can deliver Microsoft Dynamics 365 solutions on your own IT infrastructure, hosted in our UK data centre or in the Microsoft Cloud.

Based in the Midlands and in the North East, we support clients across the UK and further afield.

Talk to us today for a jargon-free discussion on how we can transform your business processes and operations.



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*Information correct as of May 2019