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PART 2: THE INTERMEDIATE

4 things
YOU NEED TO KNOW
NOW
SERIES

Microsoft Dynamics 365
Business Central

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* Information correct as of January '19

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4 things you need to know about upgrading from Dynamics NAV to Dynamics 365 Business Central

4 things you need to know now about upgrading from Dynamics NAV to Dynamics 365 Business Central

With the launch of Microsoft Dynamics 365 Business Central, effectively the next release of Microsoft 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.
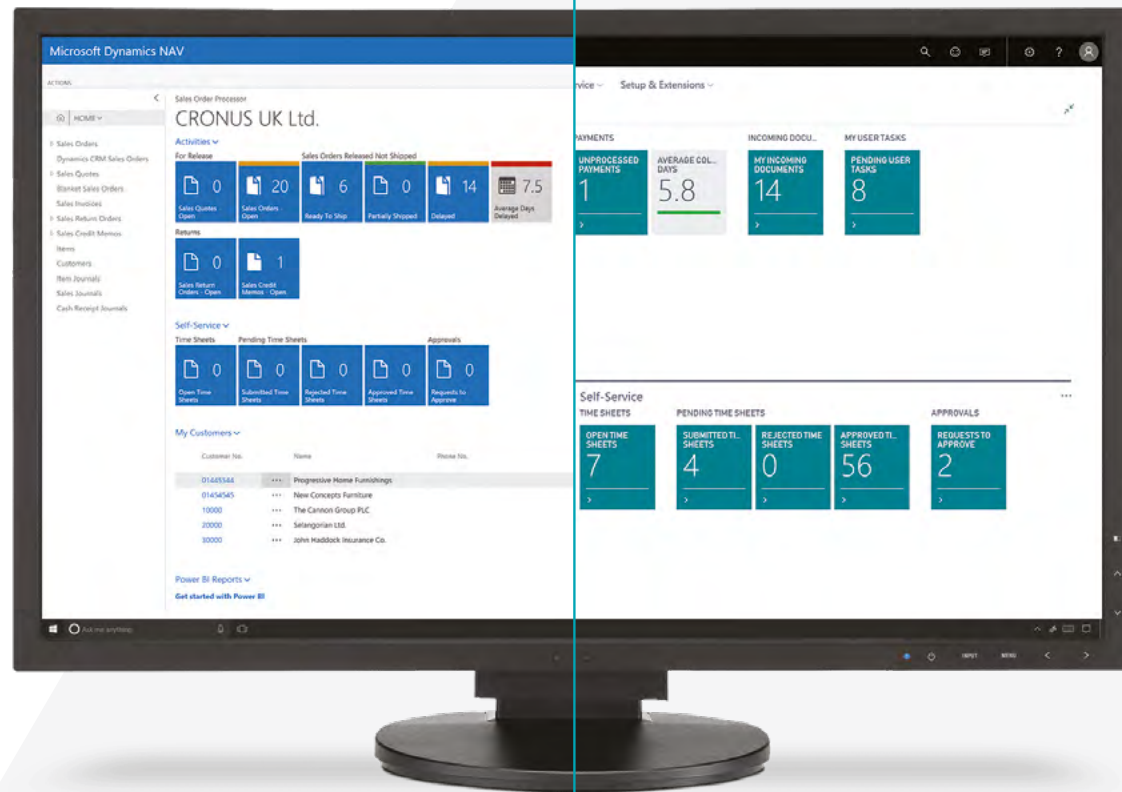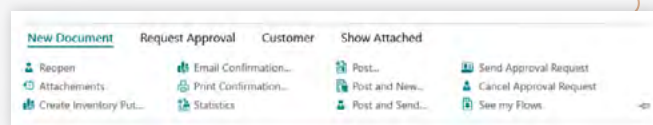
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1 A new User Interface

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 Client[1] 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.

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.

[1] Sometime 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.

4 Functionality

With each release[2] of Microsoft 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 ⬀

- **Dynamics 365 Applications release notes October 18:** Launch 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]).

Summary

Whilst almost every Dynamics NAV implementation has its own customisations and/or third-party integrations that need to be considered when upgrading to Dynamics 365 Business Central, at least you've now got the core considerations covered!

Don't forget to check out our earlier "need to know now" publication – 5 things you need to know about now about the basics of Dynamics 365 Business Central.

If you think your business is ready to upgrade - get in touch!

Get started ❯