



Business Central SaaS Update Readiness Checklist

A step-by-step guide to prepare for Microsoft's
biannual updates—with less risk and effort



Let's Get Started

Microsoft Business Central's biannual updates require careful planning to minimize risk and disruption. This five-phase approach will guide you through the essential steps, from reviewing release notes to confidently deploying updates in production.



Phase 1: Understand What's Changing

- ✓ Review the [official Microsoft release plan](#)
- ✓ Identify new features that affect key workflows or data models
- ✓ Determine any deprecated functionality or breaking changes
- ✓ Flag features that require user training or process changes



Phase 2: Prepare Your Environment

- ✓ Inventory all customizations, extensions, and ISV apps
- ✓ Confirm licensing and support status of third-party tools
- ✓ Check for any unsupported custom code
- ✓ Communicate roles, responsibilities, and timelines internally

Need help auditing your environment?
[ArcherPoint by Cherry Bekaert can help.](#)



Phase 3: Deploy the Update to a Sandbox

- ✓ Clone your production environment to a sandbox
- ✓ Apply the new update to the sandbox
- ✓ Confirm that data and configurations migrate cleanly
- ✓ Document the steps for a future production deployment



Phase 4: Test and Validate

- ✓ Run regression tests on your most critical workflows (order-to-cash, procure-to-pay, reporting, etc.)
- ✓ Involve key users in User Acceptance Testing (UAT)
- ✓ Validate third-party apps and extensions still function properly
- ✓ Test integrations with external systems (e.g., payroll, CRM)

Set a **recurring calendar reminder** to review Microsoft's release plans every 6 months.



Phase 5: Go Live with Confidence

- ✓ Schedule the production update during a low-impact time
- ✓ Communicate the change to all affected users
- ✓ Train users on any changes in interface or workflow
- ✓ Monitor system health and performance post-deployment

Use **test scripts** and **signoffs** to streamline UAT.

Want ArcherPoint by Cherry Bekaert to Handle This for You?

We make updates painless—from sandbox deployment and testing plans to full rollout. Explore our [Stay Current Assurance Plans](#).