

eBook

# **Business Central SaaS Updates Made Easy**

How to Take the Headache Out of Staying Current



## **Table of Contents**

Introduction	1
Chapter 1: Why SaaS Updates Can't Be Ignored	1
Microsoft's Cloud-First Approach	1
What Happens When You're Not Ready	2
Chapter 2: The SaaS Update Challenge	2
Why "Just Click Update" Doesn't Work	2
The 5 Critical Phases of SaaS Success	3
Chapter 3: Building Your Release Management Process	4
Creating a Repeatable Framework	4
Your Update Readiness Checklist	4
What Internal Release Management Actually Requires	4
Chapter 4: The ArcherPoint by Cherry Bekaert Advantage	5
Why Smart Organizations Leverage BC Release Management Services	5
Our Proven Methodology	5
Stay Current Assurance Plans	6
Chapter 5: Your Path Forward	6
Step 1: Assess Your Current Situation	6
Step 2: Choose Your Approach	6
Step 3: Get Started Now	7
Conclusion: From Stress to Strategic Advantage	7

#### Introduction

Microsoft releases major updates to Dynamics 365 Business Central SaaS **twice a year**. These updates deliver valuable new features, performance improvements, and critical security patches, but they can disrupt business processes if not managed properly. This guide helps Business Central SaaS users—whether in IT, finance, or operations—understand what's required to stay current and how to simplify the process without draining internal resources.

#### What you'll learn:

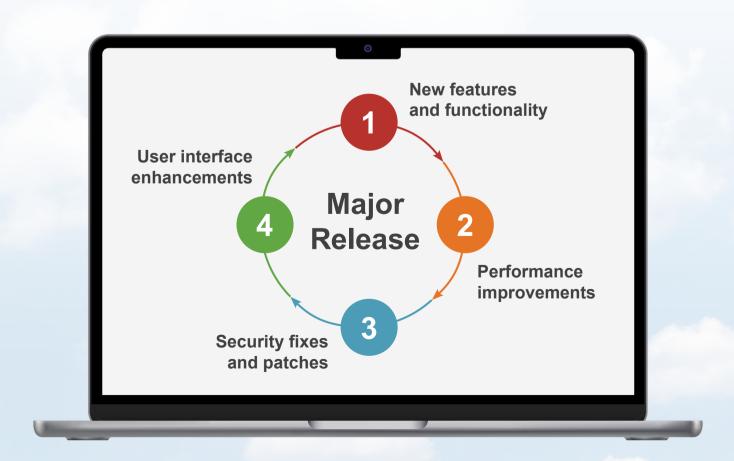
- The risks of ignoring SaaS updates
- The unique challenges of cloud-based release management
- How to build a repeatable, low-stress process



#### Chapter 1: Why SaaS Updates Can't Be Ignored

#### **Microsoft's Cloud-First Approach**

Microsoft delivers **two major updates to Business Central SaaS each year**—typically in **April** and **October**—with monthly minor updates in between. Unlike on-premises software, where you control timing, SaaS updates deploy automatically according to Microsoft's schedule. Currently, **all major and minor updates are mandatory**. Microsoft is developing functionality to allow customers to skip minor updates and receive only major updates. When this feature becomes available, you'll only be required to apply the major releases, as all minor updates will be consolidated into the following major update. Each major release includes:



#### What Happens When You're Not Ready to Update

The automatic nature of SaaS updates creates unique risks that didn't exist with on-premises deployments:

- Extension conflicts can halt critical business processes
- Integration failures cascade across connected systems
- Unplanned downtime can stall operations while scrambling to fix compatibility issues



#### **Real Impact**

Unlike on-premises, where you could postpone indefinitely, SaaS updates happen whether you're ready or not. Organizations that don't prepare can face significant disruption when updates deploy automatically.

#### **Chapter 2: The SaaS Update Challenge**

#### Why "Just Click Update" Doesn't Work

Business Central SaaS updates aren't like updating your smartphone. Organizations with customizations, extensions, or integrations face a complex web of dependencies that can break when Microsoft changes Business Central's underlying code. Here's why Business Central SaaS updates are different:

## No postponing major updates indefinitely

Unlike on-premises systems, where you control the timing, Microsoft enforces mandatory update windows that give you limited flexibility to delay major releases, forcing organizations to adapt to their schedule rather than their own business readiness.

### Breaking changes can disable functionality

Microsoft regularly introduces changes that can render existing customizations, third-party extensions, or integrations non-functional, potentially disrupting critical business processes without warning if proper testing hasn't been conducted.

## Deprecation warnings require immediate action

When Microsoft announces that features or APIs will be removed in future updates, organizations must quickly assess their dependencies and implement alternative solutions before the deprecation deadline arrives.

## Automatic deployment as per Microsoft's timeline

Updates roll out based on Microsoft's global deployment schedule rather than your organization's preferred maintenance windows, which can conflict with busy periods, month-end processes, or other critical business activities.

#### The 5 Critical Phases of SaaS Success

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Phase 1:
Release Monitoring

Stay ahead by monitoring Microsoft's release announcements and reviewing detailed release notes. Microsoft typically provides 30 days' notice for major updates—a short window when complex customizations are involved.

Phase 2: Impact Assessment

Inventory your customizations, extensions, and integrations. Each represents a potential compatibility challenge that needs to be evaluated before the update is deployed to production.

Phase 3: Sandbox Testing

Apply updates first in your sandbox. Test critical business processes, validate extension compatibility, and identify issues while you still have time to resolve them.

Phase 4: Issue Resolution

When testing reveals problems, resolve them before production deployment. This might involve updating custom code, coordinating with ISV partners, or developing temporary workarounds.

5 Phase 5: Product Support

Monitor system performance closely when updates are deployed. Have predetermined validation checklists ready to quickly confirm critical processes are working correctly.

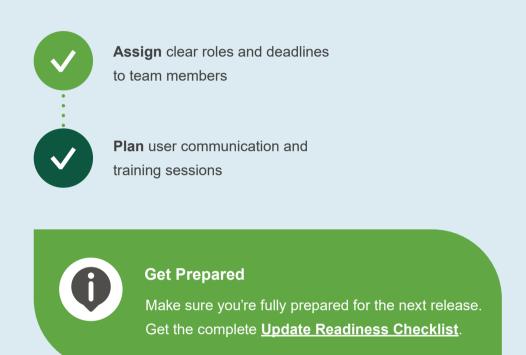
#### **Chapter 3: Building Your Release Management Process**

#### **Creating a Repeatable Framework**

The most successful Business Central SaaS customers treat updates as predictable business processes, not IT emergencies. This requires documented procedures, clear responsibilities, and consistent execution.

#### **Your Update Readiness Checklist**





#### **What Internal Release Management Actually Requires**

Successfully managing Business Central updates internally demands more resources than many organizations initially anticipate. Here's what you'll need to allocate:

- **Time Investment:** Each major update requires significant preparation work, including testing, validation, and coordination across multiple team members and departments, often more than organizations initially anticipate.
- **Technical Skills:** Your team needs proficiency in AL development and extension management, as well as the ability to troubleshoot compatibility issues between your customizations and Microsoft's changes.
- Business Process Expertise: Someone must understand your critical workflows well enough to validate that updates haven't
  disrupted essential functionality or introduced unexpected behavior.
- **Project Coordination:** Updates involve multiple stakeholders, testing phases, and communication touchpoints that require dedicated project management to execute smoothly.
- **Continuous Monitoring:** Staying ahead of updates means regularly reviewing Microsoft's roadmap, deprecation notices, and pre-release documentation to identify potential issues before they become problems.
- Pro Tip: Establish a regular review cadence by scheduling team meetings every 6 months to assess your readiness for upcoming releases and incorporate lessons learned from previous updates.

#### Chapter 4: The ArcherPoint by Cherry Bekaert Advantage

#### Why Smart Organizations Leverage BC Release Management Services

Many businesses find that managing Business Central SaaS updates internally consumes significant resources needed for strategic initiatives. The twice-yearly cycle creates competing priorities that can compromise preparation quality. ArcherPoint's <a href="Stay Current">Stay Current</a>
<a href="Assurance Plans">Assurance Plans</a> solve this challenge by providing dedicated expertise focused exclusively on keeping your Business Central environment stable and current.

#### **Our Proven Methodology**



#### **Proactive Code Analysis**

We identify potential conflicts before Microsoft releases updates, using automated tools and expert review to examine your customizations for compatibility issues and deprecated code usage.



#### **Dedicated Testing Environments**

Our team creates a sandbox environment specifically for testing and validation, so you can thoroughly test before updates reach your production system.



#### **Automated Test Scripts**

We can develop automated test scripts to remove manual testing of well-documented processes.



#### **Expert Issue Resolution**

When problems are identified, our developers provide immediate solutions that maintain your business processes while incorporating necessary updates.

#### **Stay Current Assurance Plans**

Feature	Basic Plan	Essential Plan	Advanced Plan
Proactive code conflict identification	<b>~</b>	<b>✓</b>	<b>~</b>
Code refactoring support	8 hours/year	20 hours/year	40 hours/year
Testing sandbox creation	<b>~</b>	✓	<b>✓</b>
Go-live planning and support	<b>✓</b>	<b>✓</b>	<b>✓</b>
Automated test scripts	+	2 scripts/year	4 scripts/year
New feature review for major releases	+	+	2 hours/year
Planned resource scheduling	<b>✓</b>	<b>✓</b>	<b>✓</b>
External integration testing	2 hours/year	4 hours/year	12 hours/year

#### **Chapter 5: Your Path Forward**

#### **Step 1: Assess Your Current Situation**

Evaluate your organization's release management maturity:

- How many customizations and extensions do you have?
- What issues have you encountered with previous updates?
- Does your team have adequate testing processes and environments?
- Can you identify and resolve compatibility issues independently?



#### **Step 2: Choose Your Approach**

- **DIY Path:** Build comprehensive internal capabilities by investing in team training, establishing standardized tools and processes, and creating detailed documentation for your unique Business Central environment. This approach requires the most significant time investment and dedicated resources, as your team must develop expertise across all aspects of release management while maintaining daily operations.
- Partnered Path: Leverage external expertise for release management while keeping your internal team focused on day-today operations and strategic business initiatives. This approach reduces the learning curve and provides access to specialized knowledge without expanding your headcount.
- Hybrid Path: Maintain internal coordination and oversight while bringing in external specialists for complex technical challenges
  like integration testing, custom code refactoring, or ISV compatibility issues. This balanced approach lets you retain control
  while accessing expertise when needed.

#### **Step 3: Get Started Now**

Don't wait for the next release cycle to identify problems. Whether you choose to handle updates internally or leverage external assistance, preparation should begin now. Here are the immediate actions:

- 1. Document your current customizations and extensions
- 2. Identify key stakeholders for release planning
- 3. Schedule a consultation to discuss your specific needs

#### **Conclusion: From Stress to Strategic Advantage**

Microsoft's commitment to continuous innovation means Business Central SaaS updates will deliver new capabilities twice yearly. Organizations that master release management transform what many consider a burden into a competitive advantage. With proper preparation and the right support, your team can leverage new features immediately, maintain system stability, and focus resources on strategic initiatives rather than crisis response.

The time to act is now. Each update cycle provides learning opportunities that improve your organization's management maturity. Don't let the next automatic deployment catch you unprepared.

Make your next update your easiest yet. Contact ArcherPoint by Cherry Bekaert to discover how our Stay Current Assurance Plans eliminate update stress and turn mandatory changes into business advantages.

