



Dynamics 365 for Finance and Operations: Monthly Update Cadence

Preparation and Implications

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The logo features a stylized white arrow pointing to the right, followed by the text "D365UG" in a large, bold, white sans-serif font, and "AXUG" in a slightly smaller, bold, white sans-serif font below it.

The Business Case

The old cycle of upgrading ERP

Purchased
ERP System

New features
continue to roll out
month by month

While your business
could benefit,
implementing them
would be like a
mini-upgrade each
time

A few years have
passed, a new
version is out, time
to upgrade?

Management resistance



Costs



Disruptions

The compromise

The need to modernize is recognize



Management still resisting upgrade "cost/disruption"



Customizations & third party solutions become the go-to



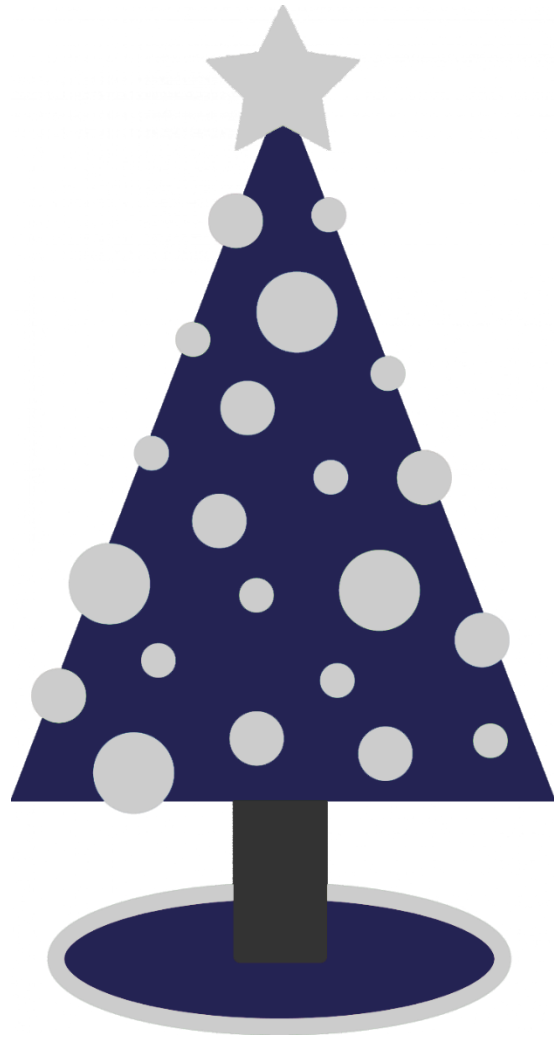
Compromise again... and again...

The need to modernize is recognize

Management still resisting upgrade "cost/disruption"

Customizations & third party solutions become the go-to





Pressure building

More new features released, considering upgrade again



Now more expensive to move (more features, more third party)



Strategy becomes Reactive vs. Proactive



The ERP System TCO Nightmare

If you think an ERP system is expensive already, consider this....

- Every few years, you're spending at least 1/3 of the original cost just to upgrade!
- Then add in the business disruptions, internal resource allocation and opportunity costs

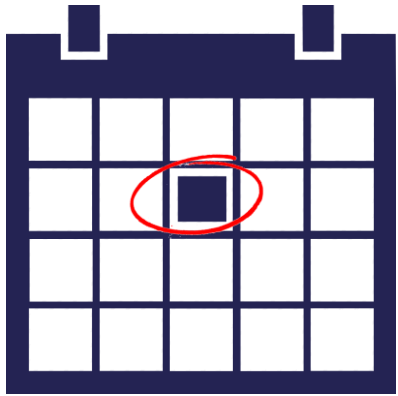


The Microsoft Response

The Microsoft Dream



“Evergreen” ERP



Minor fixes and functionality tweaks every month



Major functionality additions every 6 months

Business users and IT resistance



Testing



Disruptions

The Methodology

How is it possible?

Automated Tools and Testing:

Code
Upgrade
Tool

Data
Upgrade
Tool

Regression
Testing

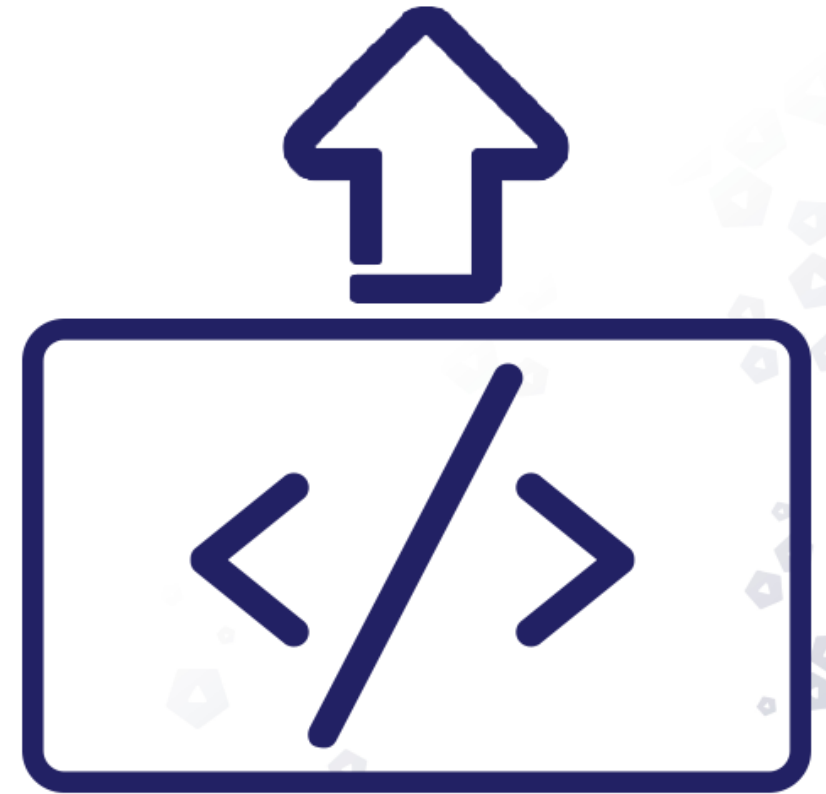
Performance
Testing

Automated Code Upgrade Tool

Extensions – No more
“Overlaying”

In place since 8.0 (2018) – Code
has been hard sealed

Minimal exceptions



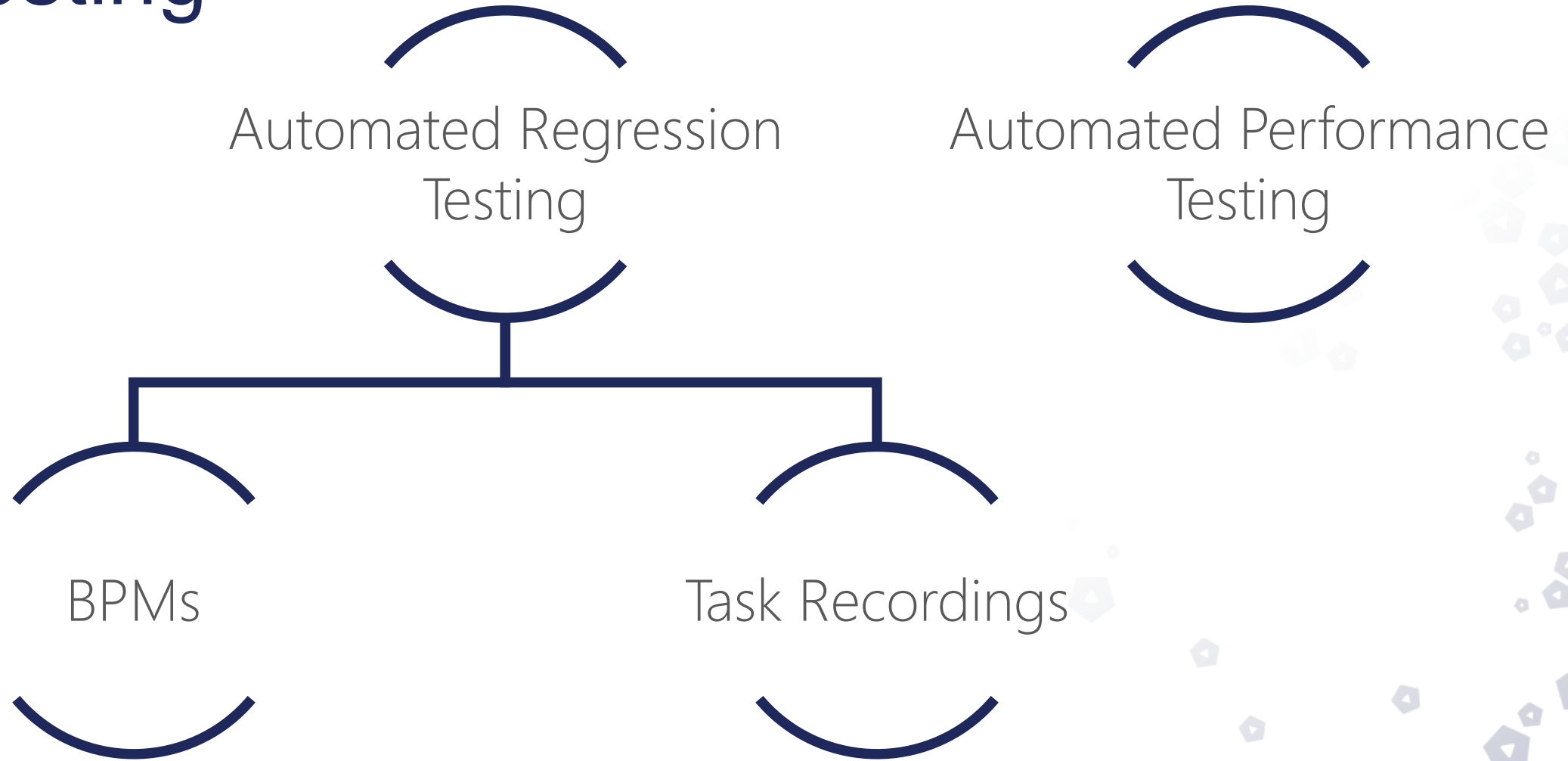
Automated Data Upgrade Tool

Automatically Migrates Data to
New Version

Minimal Exceptions



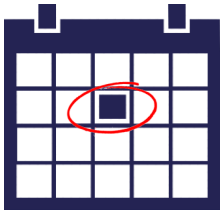
Testing



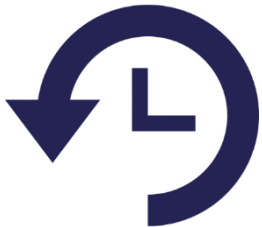
Release cadence



Release notes published in advance
Pre-releases available



Update to new version every 30 days



Delay up to 90 days
New features are turned off
Backward Compatible

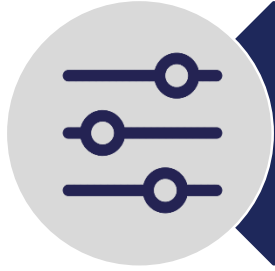
What's next if you are moving to D365?

Follow best practices (Your Partner should ensure that)

Use the tools LCS tells you to use

- BPMs, Task Recordings, Extensions

What's next for existing D365 customers?



BPM & Task Recording
Refinement



Build Test Scripts



Implement Regression Testing
Suite



Questions?

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