



# MASTERING THE UPGRADE

A must have guide to moving to  
Microsoft Dynamics 365 Business  
Central



## Creating The Architecture

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Let's take a step back to understand the meaning of architecture as it relates to any software system, including your current ERP solution. Much like the blueprint for a building, every software system has an underlying architecture designed to provide structural support for system reliability and performance. That architecture is defined by the operational requirements of your business processes.

Your original decision to choose your current software for your business was based on a set of requirements that your software at the time could best fulfill. Similarly, the software systems that NASA chose to control the space shuttle launch were based on the requirement of being very fast and very reliable. There was no room for error or poor performance.

The plan for your move to Microsoft Dynamics 365 Business Central will also require an architecture to ensure continued reliability and performance standards. So yes, it's akin to rocket science!

But don't let that scare you, because the Qixas Group team has that architecture down pat. We are Dynamics 365 specialists and we have the tools to make your upgrade or implementation run smoothly and painlessly.

## Let's Take a Look at Business Central

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Microsoft Dynamics 365 Business Central is the new cloud ERP solution that's making waves in the market and among Microsoft Dynamics NAV and GP customers. It has all the features and capabilities of NAV, with the scalability, ease of access and many other benefits that the cloud offers. For Dynamics NAV customers, Business Central signifies potential; to rethink your business processes; to have a faster, more modern business system built for the way modern employees work; potential to streamline infrastructure and reduce costs.

Using the Microsoft Cloud technology, you can start with the basic needs of your business and add more applications in it as you keep growing. Let's have a look at some of its features which make it perfect for small and mid-sized business:

### **It combines Microsoft's Best Technology**

Microsoft Dynamics 365 for Business is a cloud ERP solution which combines the Microsoft's best software into one system. The need for separate software for sales, accounting, email and data storage are eliminated since functionalities are managed in one complete solution. Software costs are reduced since there is no need in purchasing specialized software for individual job needs.

### **Purpose Built Apps**

CRM and ERP capabilities are merged into one solution and the result is seamless support in marketing, sales, customer service, project service, financials and other operations. All Apps added into the suite are purpose built, which helps to manage particular needs, functions and requirements of your business with ease.

### **It enhances productivity**

All data is stored in one place making it easier for employees to access the tools they need to complete their jobs. This results in a more productive and efficient workplace. Being able to see a clear vision of all business departments, you will be able to engage customers by putting them through a customized sales cycle and provide them with better service and more responsive customer support.

# Business Central Deployment Options

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It's time to deploy an Enterprise Resource Planning (ERP) solution for your business and you are torn between using the cloud method and the good old on-premises servers. While deploying ERP solutions have been done using on-premises servers in the last few years, cloud deployment is becoming increasingly popular, but this has not displaced the use of on-premises servers. The question remains, which method is better; cloud or on-premises?

When implementing an ERP System the first, and possibly most important, choice to make is whether to choose a cloud solution located in the cloud on a rented server or whether the solution must be implemented locally on your own server, also called on-premise. Both methods have their own advantages and disadvantages, which should be taken into consideration before choosing a solution. There is not one type of solution that suits all companies, it depends entirely on your business needs. You should therefore analyze the company's needs and then determine which method best suits your company's needs.

## Cloud

A cloud solution is hosted on servers operated by a vendor, such as Microsoft Azure, and accessed through a device connected to the Internet.

## On-premise

With on-premise, you use your own physical servers and IT infrastructure to host and operate the ERP solution.

## Hybrid

This method is a mix of both on-premise and cloud hosting. A method that is becoming increasingly popular among companies. The reason may be that a hybrid installation offers the same flexibility and easy approach as a cloud solution as well as

the same level of security and customization as an on-premise installation. However, a hybrid installation requires the same level of infrastructure, maintenance and internal IT resources and competencies as a local ERP installation.

## SaaS

If you want to know your ongoing operating costs in advance and not be surprised by sudden and unexpected costs, you can advantageously choose a SaaS (Software as a Service) solution, where you rent an ERP application hosted by an IT supplier, for example by Microsoft if you choose Business Central as SaaS solution. All costs in a SaaS solution is included in one single price, typically a monthly license per user, rather than having separate expenses for license and hosting.



# Dynamics 365 Business Central On Premise

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The on-premise version of Business Central is for those companies who, for many reasons, may need to have control over their own server, and hence their data, and / or need more customization options than the cloud version offers. As with Dynamics NAV, Business Central On-premise is extremely flexible and can be tailored exactly to the needs of your business, no matter how complex they may be. In other words, Business Central On-premise can run business processes in exactly the way that is needed and regardless of which type of business you run and in which industry. The solution has the functionality you need to streamline and optimize the operation of the company while you gain full insight into and an overview over the company's individual processes and how they affect operations in the company.

## The Intelligent Edge

With a Business Central On-premise installation, you can connect to The Intelligent Edge. The term 'The Intelligent Edge' is used in many ways, but in short, The Intelligent Edge is where things actually happen, meaning the things that are connected to the Internet when talking about IoT (Internet of Things). The Intelligent Edge consists of a set of connected systems and devices that gather and analyze data close to your users, data or both.



# Dynamics 365 Business Central Cloud

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For smaller companies who may not have the time or resources to find the right server solution or to run it, Business Central Cloud can be the right solution. The Cloud version of Business Central is not as flexible and adaptable as the on-premise version, but you can, however, develop or buy so-called Extensions. Extensions are plugins you use to customize the solution, but without changing the basic code itself. Therefore Extensions are finished solutions, not real adjustments.

## The Qixas Way: Key Project Stages in Deploying Business Central

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Putting any project into action takes a number of crucial steps. Just heading out in what you hope is the right direction causes problems. We have been Microsoft partners for some time now and understand what it takes to deliver a successful project. Let's take a look at the essential steps to ensure your project turns from an idea to success.

### Understanding The Brief – The Define Phase

At the beginning of any project, the stakeholders need to understand what is required of them and the desired end result. And all of this starts with a meeting. We sit down with you and understand just exactly what it is you want to achieve. At this meeting, we gather all the information required to put your ideas into practice. We will ask questions about your existing or new business so that we fully understand what we will need to do to make your ideas reality. Whether that is implementation services, upgrades, performance tuning, training and support, we start by understanding your business so we can provide the very best Microsoft Dynamics solution. One that is tailored to you.

We define our success on the deliverables (the real things that can be achieved in each step) and with the initial step, you can expect us to deliver

- A Functional Requirements Document that outlines just what is needed
- Fit Gap Analysis Spreadsheet so we can see what is and what isn't possible
- Business Process Maps/Workflows so we understand where the project fits into your business
- System Specification as we start to think about the practical solution
- Data Migration Requirements

## Going Deeper – The Design Sub-Phase

Once we have gathered information, we get thinking on how we can implement the project. Theory is great, but the practical delivery of a working solution is the whole point of hiring us. The deliverables above are checked and broken down so we can see what we need to do technically. One of the core principles that we work to throughout the project is risk management. With software increasingly becoming the target of hackers, we ensure that we put you in the safest position possible. We identify risks and ensure that the plan takes all of these into account.

This is the point where we will present a Microsoft Dynamics solution to you. We have gone away and assessed all of the requirements, analyzed the potential and checked the risks. From here you have the decision to make. Will you go ahead with our proposal? We'd like to think so! There will be a lot of technical information contained at this point of the process. It is necessary to explain exactly what it is we will conduct for you. Don't worry though. If you have any questions at all then we are here to help you understand. Ask as many (or as few) questions as you like. Our expert team are here to help you understand the project and the results.

## Putting The Meat On The Bone – The Plan Phase

This is where things start to get really exciting! The plan phase is the part of the project where we take all of the agreements and research and get down to the nitty gritty. This is where you really start to see the project take off. A major part of our project delivery is to ensure you, the end user, knows exactly what you can do with the solution. So, training becomes an essential component of the project from here on in.

The key deliverables in this part of the project are

- Risk and Issues Register so we know where we need to offer protection
- Project Charter which will act as a working document for the whole project
- Project Plan with timelines for delivery
- User Training Requirements where we can offer you support

There will be additional deliverables if this is an Enterprise project. Rest assured that we have the experience and expertise to help you get to where you want to be with this. The project management team will liaise with your team to ensure that we move things in the right direction, and work hand in hand while doing this. Communication is a cornerstone of what we do.

## Putting Plans Into Practice: Execute Phase

Now we move into the part of the project where we get to see something that resembles the final product. We build the systems that you will use when the project is delivered. Then start with the different components and test each of these individually to ensure they are fit for purpose. After that we look at how each of these fit together. It is only once they all fit together and work that we know we have a system that will provide what you need.

There are a whole host of deliverables here, which include –

- Final Business Process Models which indicate the finished product
- Final System Configuration so you can have an operational Microsoft Dynamics solution
- Final Custom Code Development to link with any existing software
- Solution Testing (Process, Integration, and Data Acceptance) completed so we understand how it will react

All of these together with others are the Microsoft Dynamics solution. We look at any risks again to ensure that we provide you with protection. There are many risks when operating on the web, so this is at the core of our operation.

You need all of the components to work together in unison. But testing something in an isolated environment doesn't give us all the answers we need. That's why we connect to the next phase.

## A Working Solution: Adopt Phase

And now we get to the part that we have all been waiting for. All the planning, production and testing have been done. This is where we embed the new solution into your existing business. Part of this will be the final levels of training for you and your team. You all want to be able to operate within the new system with ease and confidence.

But the adopt phase is about far more than that. We are now heading into the 'go live' part of the project. This is where we really earn our crust as we constantly monitor the solution to ensure that it does exactly what you need. This includes

- Managing risks and issues
- Communicating with you
- Listening to your feedback
- Updating the Project Plan as necessary

And all of this happens in real time, so you have the support needed to make your system run as smoothly as possible. Our team are here to help you understand how it all works, as well as there to listen to what you, your team and your customers are saying. This feedback is vital to ensuring that the solution works seamlessly.



## **Flying Solo: Deploy Phase**

This is the part where we switch off any old systems; and you use only the new Microsoft Dynamics system we have built for you. The key deliverables here are –

- Final Data Migration so that the new system carries all the load
- Final System Readiness & Go-Live Checklist so you know what is happening
- Production System for you and your team
- Cutover to Production so the new solution runs correctly

This is where you sign off the project as complete, as we deliver a successful solution for you. There will be many questions here, and we are at hand to answer these and put your mind at rest.

## **Ongoing Support: Stabilize Phase**

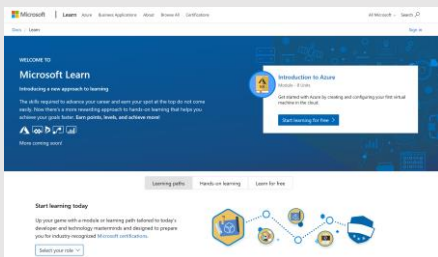
But the Deploy Phase isn't the end of our journey together. We are still there as your new Microsoft Dynamics system is used day in, day out. We are here to support you post-production, and to help you with the transition. Moving to a new system is never without a hiccup or two. None of these will be major issues but when they happen you know we are here to call on. Obviously, we want to make sure you are totally satisfied with the end result of our work, so we are always there to help you make a success of the solution.

Ready to make the switch? Qixas Group sets up and configures Business Central to meet your unique business requirements. Call us today to book your complimentary discovery call. At the end of one hour, you'll know the questions you need to ask and the criteria you need to use in choosing your Business Central implementation partner.

# Business Central Resources

Bookmark these resources to continue driving end user engagement throughout your adoption journey.

## [Microsoft Learn](#)



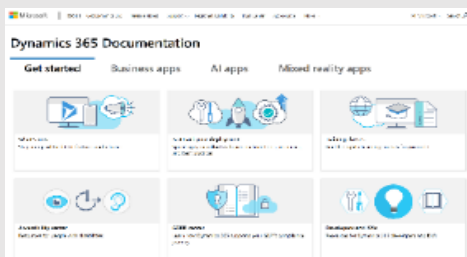
Primary destination for Dynamics 365 learning with videos, tutorials, and hands-on learning.

## [Qixas Academy](#)



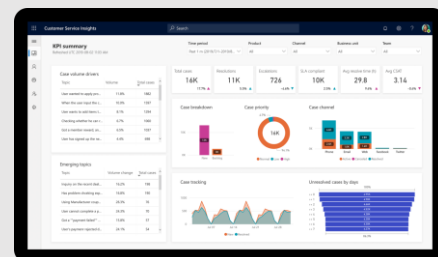
On-demand training for Microsoft Dynamics 365 Business Central, NAV and CRM solutions.

## [Dynamics 365 Complete Docs](#)



Documentation, blogs, release notes and complete resources for admins, developers and IT professionals.

## [Dynamics 365 Licensing Information](#)



Information on licensing options and pricing. Special promotions maybe available through your partner.

## Contact Us

Qixas Group is a one stop Microsoft partner that specializes in implementations, upgrades, project rescues, performance tuning, support and training for Microsoft technology solutions.

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