Microsoft Dynamics 365 for Finance and Operations Update Service

As a native cloud application, the pace of innovation around Microsoft Dynamics 365 for Finance and Operations (formerly Dynamics AX) has accelerated significantly, with Microsoft releasing new platform and application updates on a consistent basis throughout the year. Ensuring that your organization has a strategy for keeping up with these changes is critical to optimizing your investment in Dynamics 365 and having the ability to easily put these new innovations to work for your business.

To help clients stay up to date on their Microsoft Dynamics 365 solution, SAGlobal now offers a Dynamics 365 Update Service – a managed services offering that helps organizations develop and execute a strategy for keeping their Dynamics 365 environments updated at the optimal frequency level for their business.

Microsoft Dynamics 365 Update Cadence

Microsoft currently provides the following types of updates to Dynamics 365 for Finance and Operations.

✓ **Platform updates** – released monthly, platform updates provide enhancements to the underlying cloud platform, such as new system management capabilities, development tools, mobile framework enhancements, additional BI technologies, and new deployment scenarios.

✓ **Application updates** – released roughly every 6 months, application updates provide dozens of new application features, new mobile apps, additional BI content packs, and other significant functional enhancements to the application.

SAGlobal also ensures that its Projects+ industry solution (formerly ProjAX) is updated in concert with these releases, both to support new capabilities released by Microsoft, as well as to provide additional feature enhancements.

Why Stay Current on Dynamics 365?

While taking each update is not mandatory, there are many reasons why your organization should stay reasonably up-to-date on Dynamics 365.

✓ With the current cadence of updates, you can fall significantly behind much faster than ever before.

✓ The farther you fall behind, the more costly and disruptive your next update will be. Conversely, the closer you stay to current, the less costly and disruptive each incremental update will be.

✓ New features and innovations are being added rapidly, but only to the most recently released version – there is no back-porting of features.

✓ The cloud toolset within Dynamics 365 makes taking updates more cost effective and straightforward than ever before.

✓ Microsoft will soon be formalizing a version support policy that will encourage clients to update their system on a relatively frequent basis.

✓ SAGlobal's support policy for Projects+ entails providing hotfixes for the current release and two prior releases (roughly 18 months).

Service Overview

SAGlobal's Dynamics 365 Update Service is a fixed price managed services offering that helps clients keep their Dynamics 365 solution updated at the optimal frequency level.

What's Included

The Update Service includes:

✓ Reviewing new feature updates and planning the update process

✓ Reviewing custom code for any re-factoring requirements

✓ Provisioning and managing additional required environments

✓ Upgrading your platform and application code

✓ Testing and go-live cutover support

✓ Optional services available for training, new features, business process optimization, and more

Update Service Benefits

✓ Minimize costs and disruption with smaller, incremental updates

✓ Position your business to adopt new capabilities at your leisure

✓ Predictable annual cost structure

SAGlobal's General Update Recommendations

While every organization's update strategy should be unique to their circumstances and priorities, SAGlobal's general recommendation for taking these updates is as follows:

✓ **Platform updates** – These updates should generally be taken every 6 months, and no less than once per year at minimum (customer-specific scenarios and specific feature requirements notwithstanding)

✓ **Application updates** – These updates should generally be taken at least once per year, if not more frequently (customer-specific feature requirements notwithstanding)

SAGlobal's Dynamics 365 Update Service

SAGlobal offers a fixed price, managed service that guarantees that your updates are planned and executed in advance, in accordance with the update strategy developed with your organization.

✓ Platform update services
  ▪ SAGlobal will apply the latest platform update and provide go-live cutover support (platform testing typically done by client)

✓ Application update services
  ▪ Review new features and develop a plan for adopting them
  ▪ Analyze code for re-factoring requirements
  ▪ Provision and manage additional required environments
  ▪ Update your application code to the latest version
  ▪ Provide testing and go-live cutover support

✓ Additional services
  ▪ Additional services such as training, implementation of new features, process optimization, code re-refactoring, and performance optimization are also available for additional fee

Update Service Pricing

Each client's pricing for the Dynamics 365 Update Service is based on:

✓ The breadth of functionality being used in Dynamics 365

✓ The number of ISV solutions being utilized

✓ The extent of customizations and interfaces to external systems

✓ The preferred frequency level of your organization's updates

Pricing is based on an annual service contract, and is a fixed fee amount based on the complexity level of your environment.

Please contact your SAGlobal Account Manager for your organization's specific annual price level.

SAGlobal Update Service Plans

✓ Standard Plan (minimum recommendation)
  ▪ One (1) application update per year (every other release)
  ▪ Two (2) platform updates per year

✓ Premium Plan
  ▪ Two (2) application updates per year (every release)
  ▪ Four (4) platform updates per year