

## Steps to Prepare for Microsoft Dynamics 365 Business Central Updates

1. Clean up production environment by removing any unused or no longer needed companies (such as test companies).
2. Update your scheduled upgrade date on your production environment to the end of the upgrade period to give you more time to prepare and test.
3. Copy production into a sandbox environment via the Business Central admin portal.
4. Change new sandbox upgrade date to be towards the beginning of the upgrade period **or** turn on upgrades individually inside Business Central via Feature Management.
5. Test out the upgrade on a refreshed copy of your sandbox environment.
  1. **Test your workflows and the system before the production environment is updated.**
  2. The most common area affected by the updates are custom permission sets. **We recommend that you compare any custom permission sets against the out of the box counterpart before the update to production.**
  3. **Test any third-party extensions and additional customizations.** We recommend creating User Acceptance Testing documentation for upgrades. Integrato can help with documentation if needed.
6. Review the features list, make a list of what features may benefit your organization.
7. **Test NEW features that you're considering in sandbox environment.**
8. **If you want help** setting up specific new features and showing them to your team, **contact [support@integratotech.com](mailto:support@integratotech.com)** and we'll schedule this with you.
9. We recommend testing these features by creating or updating a sandbox environment to test without effecting your live company until you are ready to deploy.