

# Microsoft Dynamics 365 F&O Upgrade Guide

|                           |                                |
|---------------------------|--------------------------------|
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| ERP Mechanics Baltic, UAB | v1: 2025-06-27 Initial Version |

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## Process

Microsoft (MS) releases about four Dynamics 365 Finance and Operations (FO) app updates (versions) per year. The version may include software changes: fixing bugs, changing existing functionalities, deleting existing functionalities, introducing new functionalities. Therefore, it is recommended to upload the version to the test FO application and test the operation of the company's main operations, reports, integrations and only then upload them to the work application.

## Scope of the process

**Process Initiation:** Identified Need to update a New MS Version

**End of process:** MS version installed to work and other applications


## MS Upgrade steps

### MS versions updated date tracking

The person responsible keeps track of the release dates of MS versions and initiates the rollout of updates. The expected versions of MS are described on the page: [Targeted release schedule](#)

In the following table:

- An asterisk (\*) in the "Release version" column denotes a major release.
- The "autoupdate schedule production start date" column refers to the autoupdate schedule that's configured in the update settings in Lifecycle Services. See [Configure service updates through Lifecycle Services](#).
- The "End of service" column indicates the date when no new cumulative service updates are provided.

 Expand table

| Release version  | Preview availability | Preview latest possible update | General availability (self-update) | First autoupdate schedule for production start date | Second autoupdate schedule for production start date | End of service    |
|------------------|----------------------|--------------------------------|------------------------------------|---|--|-------------------|
| CY26Q4: 10.0.49* | July 27, 2026        | August 17, 2026                | September 11, 2026                 | October 2, 2026                                     | November 1, 2026                                     | May 21, 2027      |
| CY26Q3: 10.0.48  | April 24, 2026       | May 11, 2026                   | June 5, 2026                       | July 3, 2026  | July 31, 2026  | February 16, 2027 |
| CY26Q2: 10.0.47* | January 26, 2026     | February 16, 2026              | March 13, 2026                     | April 3, 2026                                       | May 1, 2026  | November 20, 2026 |
| CY26Q1: 10.0.46  | October 24, 2025     | November 17, 2025              | December 26, 2025                  | February 2, 2026                                    | March 1, 2026  | August 21, 2026   |
| CY25Q4: 10.0.45* | July 28, 2025        | August 8, 2025                 | September 12, 2025                 | October 3, 2025                                     | October 31, 2025                                     | May 22, 2026      |
| CY25Q3: 10.0.44  | April 25, 2025       | May 2, 2025                    | June 6, 2025                       | July 4, 2025  | August 1, 2025                                       | February 17, 2026 |
| CY25Q2: 10.0.43* | January 27, 2025     | February 7, 2025               | March 14, 2025                     | April 4, 2025                                       | May 2, 2025  | November 21, 2025 |

The most relevant date is in the "General availability" column. From the specified date, the version is available, but it is not advisable to upload it immediately. When a new version of MS appears, it is recommended to wait a few months and only then upload the update. This will avoid possible version errors and receive the necessary fixes.

So, if the version becomes available (General availability) in March, it is best to move it in May-June.

Versions marked with the \* symbol are treated as major.

## Notification of the new version of MS

If the customer has an active ERPM installation or support agreement, they will be notified about new version of MS. Otherwise, the company itself is responsible for keeping track of when new versions of MS appear.

## Skipping a version

Major (\*selected) versions **cannot** be skipped. And additional versions can be skipped. This means that if version 10.0.43\* is installed, then 10.0.44 does not need to be uploaded, you can wait for 10.0.45\* and only that can be installed. Skipping the major version may cause problems updating the version, in the worst case, you may need to rebuild the application.

## Descriptions of changes

MS publishes a list of changes for each version and short descriptions in the ["What's New or Changed FO" section of its page](#). When you open the link for the required version, all changes are visible.

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 Ask Learn 

# What's new or changed in Dynamics 365 Finance

01/27/2025

## Releases of Dynamics 365 Finance

To see what's new or changed in each release of Dynamics 365 Finance, see the following topics.

 Expand table

| Version | Build number | Auto-update availability | Learn more   |
|---------|--------------|--------------------------|--|
| 10.0.44 | 10.0.2263    | June 2025                | <a href="#">What's new and changed in Dynamics 365 Finance version 10.0.44</a> |
| 10.0.43 | 10.0.2177    | March 2025               | <a href="#">What's new and changed in Dynamics 365 Finance version 10.0.43</a> |
| 10.0.42 | 10.0.2095    | December 2024            | <a href="#">What's new and changed in Dynamics 365 Finance version 10.0.42</a> |
| 10.0.41 | 10.0.2015    | September 2024           | <a href="#">What's new and changed in Dynamics 365 Finance version 10.0.41</a> |
| 10.0.40 | 10.0.1935    | June 2024                | <a href="#">What's new and changed in Dynamics 365 Finance version 10.0.40</a> |

## Recommended order of updates for MS versions

1. Install the version into the test application.
2. All new features that appeared with the version are enabled; except for features that cannot be disabled when enabled.
3. All the main processes relevant to the company are tested.
4. If the test passes without errors, the version is moved to other environments: pre-release, dev, and finally production.
5. There is no need to turn on all the new features of the version in the production environment.

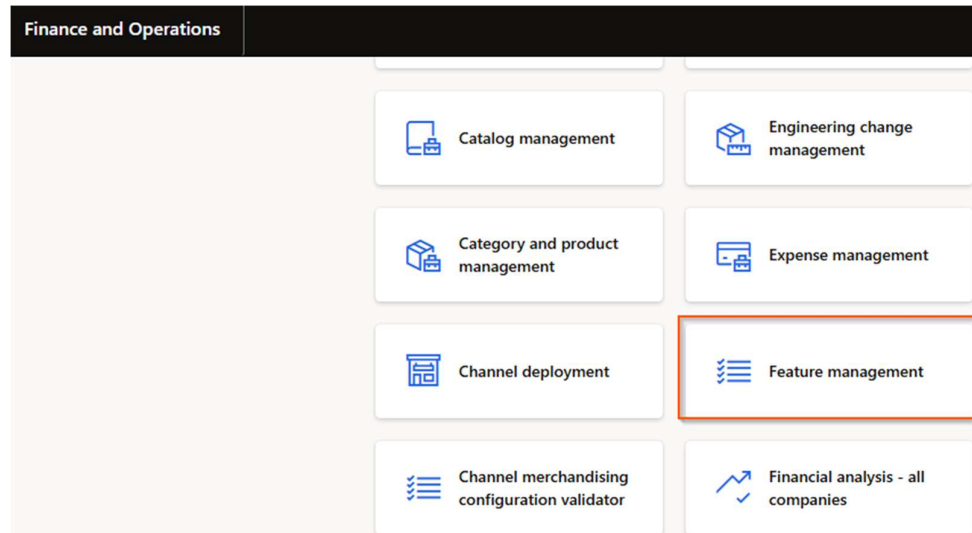
## Maintaining version consistency

Because version testing and upgrading can take time, it is not uncommon for different environments (e.g. dev and prod) to have different versions. It is recommended not to upload other (custom) software updates during this period. If such work is unavoidable, such changes should be monitored more closely, making sure that there are no problems due to the difference between the versions.

## Enabling features in a test environment

Features are available through the main system menu. With the version, new features may be created, or some made to be mandatory enabled. This means that those features that came with this version can theoretically be enabled in the future


(with a new version update). Therefore, in the test application, it is worth turning them on and testing them, checking whether they do not interfere with and do not change the company's usual work.



The Feature Management pane has a New section and a Feature Add Date is recorded. Based on this, you can see what new features have appeared. Most features can be user-activated and then disabled. There are functions that cannot be disabled if enabled.

It is necessary to pay attention to:





- The country in the function name (e.g. Japan). If the system does not contain companies whose main address is in that country, or if the functionality of that country is used exclusively, such a function is not relevant and does not need to be activated.
- If the status of a Feature is "Preview Status", such a feature may not be fully prepared, and it is not recommended to turn it on.
- If the status has an exclamation point, it is necessary to check what warning is written. And if it is a function that cannot be disabled after activation, then it is recommended not to turn on such a function if it is not necessary.
- If a function has a red X in the Status section, it means that it cannot be enabled for some reason.
- A feature's status of "Required" means that at some point that feature has become mandatory and can't be turned off.



**Feature management**  
Do not enable new features automatically

New 52 | Not enabled 289 | Scheduled 2

Enable all | Check for updates

New | Not enabled | Scheduled | All

| Feature name   | Status  | Enable date | Feature add... | Feature state | Module                 |
|--|---|-------------|----------------|---------------|------------------------|
| (Japan) Default value for the sales tax adjustment transa... |   |             | 2025-06-04     |               | Accounts receivable    |
| Collections process automation track step enhancement        |  |             | 2025-06-04     |               | Credit and collections |
| Consolidate vendor invoices for the same vendor in ven...    |  | 2025-07-10  | 2025-06-04     |               | Shared AP and AR       |
| Default the requested ship and receipt dates to a future ... |  | 2025-06-04  | 2025-06-04     | On by default | Retail and commerce    |
| Master company data sharing                                  |  |             | 2025-06-04     |               | System administration  |

**Collections process automation track ...**   
Feature added 2025-06-04  
Credit and collections  
[Learn more](#)  
This feature cannot be turned off once it has been enabled.  
**Description**  
Localizes the track step functionality at the individual process hierarchy level, allowing customers the flexibility to enable the functionality for specific hierarchies. If the track step parameter was previously enabled, activating this feature will apply the track step functionality to all existing process hierarchies.

**Conclusion: In the test application, after the launch of the MS version, it is recommended to enable new functions (feature), which:**

- It does not have a warning that it will not be possible to shut down.
- It does not have a stop status that requires additional changes.
- Does not have a specified country (which is not relevant to the company).
- Is not a preview version.

## Upgrade Time

During the MS update, the environment is unavailable for about 1 hour. If everything goes smoothly, then you can connect and work with the environment. When uploading updates, the time is coordinated individually. It is recommended to update the working environment after working hours so as not to slow down the company's ongoing processes. The update of the test and remaining environments can be done during the day, provided that the environment will be unavailable on that day.

## Testing

After the upgrade, the person responsible activates the new features and tests the main operations, reports and integrations used in the company (if possible). If the company does not use certain functionalities (e.g. does not issue receipt documents), it does not need to be tested. The list is exemplary, if the company uses more modules (e.g. production, planning) – you need to test them as well. Errors due to the MS version update are rare, but to make sure smooth transition, it is recommended to conduct tests.

- Purchase order with receipt and invoice.
- Sales order with packing slip and invoice.
- Payment and settlements of customers/vendors.
- Posting via G/L journal.
- Posting of inventory journal.
- Transfer orders posting.
- Posting of a fixed asset transaction.
- Recalculation of inventory costs.
- Print invoice (to the screen).
- Trial balance report.
- Sales tax report "Sales tax report for settlement period"
- Inventory value report.
- Debt reconciliation statement
- GPAIS data generation and xml export
- I-VAZ data generation and xml export
- I-SAF data generation and xml export
- **Review and test those functionalities that are mentioned in the version description and related modifications.**
- Integrations and non-standard functions.

During testing, the focus is on critical software errors: whether the function starts, whether the result is visually obtained, or whether the created buttons/fields have not disappeared.

## What to do if an obvious error appears during testing that is related to the MS update?

Common errors that are related to data or settings and not related to updates are addressed normally. Errors after an MS update are rare, but if it would be one, it is most likely that it will not be in the MS standard, but in modified or newly developed solutions. One of the reasons could be: the standard method used in the solution has been abolished. In this case, when running the form/function/report, we will get an error, or there will be a lack of field filling, etc.

First of all, it is necessary to identify whether the error was found in the standard or modified solution. Then check if the error is due to the activation of any feature or is not related to it.

### Error found in the functionality of the ERPM standard

ERPM standard – these are standard solutions that are not adapted to the individual needs of the customer (e.g. GPAIS, ISAF). If such a solution has been modified specifically for the customer, it is no longer considered an ERPM standard. Customer-ordered modifications are also not considered an ERPM standard.

The solution is adjusted at the cost of the ERPM. Customers who have that solution are informed. Fix is installed to the system. If the solution works without errors after disabling the unnecessary functionality (a feature that was enabled for the purpose of testing) – then the change is not very urgent, but we need to plan to fix it until the next version of MS.

### Error found in ERPM modified functionality (change is customer-specific)

The solution is adjusted at the customer's cost by arranging it to work according to the new version. If the solution works without errors after disabling the unnecessary functionality (a feature that was enabled for the purpose of testing) – then the change is not very urgent, but we need to plan to fix it until the next version of MS.

### Error found in third-party modified functionality

It is recommended that corrections be made by the authors of the solution.

### Error found in standard functionality

In extremely rare cases, an MS update can break the existing standard functionality. In this case, you need to make sure that the change is not planned (not described under the MS version updates description). Planned changes to MS are not considered an error.

If this is really an error, you can contact MS support. In order to avoid such errors, it is recommended not to rush to upload the version as soon as it appears, as described at the beginning.

## ERP Mechanics Services

| Task   | You are in an active installation or support agreement   | Applying without a contract   |
|--|--|---|
| Informing about the new version of MS and offering to put together   | Free   | Not applicable  |
| Putting the version in one environment (the rate depends on whether the work is done during work hours or not) | 1 hour   | 1 hour, but all logins and permissions must be prepared in advance.   |
| Fix problems that occur during versioning  | For the time spent   | For the time spent  |
| Consultant testing in a customer's test environment  | For the time spent, at least 6 hours. It depends on how many modules the customer uses, how many integrations it has, and what processes have been modified. This is subject to the condition that all modifications have been made by the ERPM. The consultant can ask the client what functions are usually used in the company. Solutions developed by third parties (non-ERPM) are not tested. If it is necessary to test solutions developed by third parties, a detailed description of those solutions is required. The time spent analyzing these solutions is counted separately. The consultant can ask the client what functions are usually used in the company. | For the time spent, at least 6 hours. Only standard functionality testing is performed; no third-party (non-ERPM) developed solutions are tested. If it is necessary to test solutions developed by third parties, a detailed description of those solutions is required. The time spent analyzing solutions is counted separately. The consultant can ask the client what functions are usually used in the company. |