



Published by:
WebSan Solutions Inc.

From Legacy to Cloud: How Dynamics 365 Business Central Transformed Financial Management



Introduction

In the professional services industry, efficiency and accuracy in financial operations are critical to sustaining growth and maintaining a competitive edge. Like many organizations relying on outdated, on-premises systems, our client faced limitations in visibility, reporting, and process automation. Their legacy Dynamics GP environment was no longer keeping pace with their needs, leading to inefficiencies and an increasing administrative burden.

The Goal

The client set out with a clear vision for transformation:

- Migrate from Microsoft Dynamics GP to the cloud with Dynamics 365 Business Central.
- Strengthen financial controls and streamline approval processes.
- Modernize reporting capabilities to provide leadership with timely, accurate insights.
- Empower staff with a scalable, mobile-friendly solution designed for the future.

The Outcome

The implementation of Dynamics 365 Business Central revolutionized the client's financial management. What once required time-consuming manual work is now automated, centralized, and accessible from anywhere. From commission reporting to purchase approvals, processes are faster, more accurate, and easier to manage. The move has not only modernized their IT foundation but also positioned the organization to adapt and grow with confidence.



The Problem

Before the project, the client was constrained by:

- **Manual Reporting:** Commission reporting required heavy Excel manipulation, consuming time and creating room for error.
- **Limited Visibility:** Financial data lacked transparency, making it harder for leadership to make quick, informed decisions.
- **Disconnected Systems:** Fixed assets were tracked outside the ERP, while approvals and workflows were handled manually.
- **Scalability Issues:** The legacy system struggled to support growth and lacked modern cloud capabilities.

The Solution

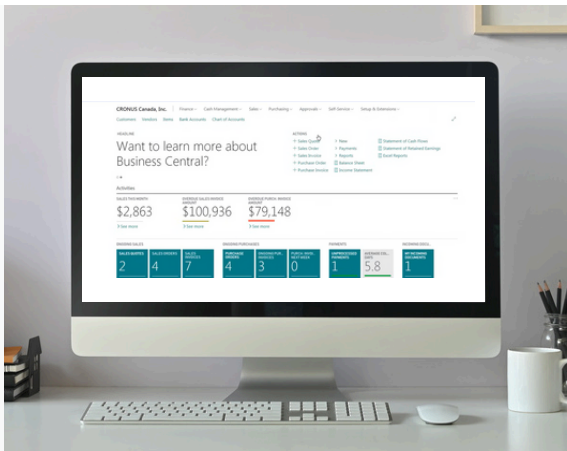
WebSan Solutions implemented Dynamics 365 Business Central with a focus on driving efficiency and automation:

- **Cloud Migration:** Leveraged Microsoft's migration tool to seamlessly transfer master data, open transactions, and historical records from GP.
- **Automated Reporting:** Delivered Jet Reports for financial and operational insights, including automated commission and revenue reporting.
- **Workflows & Approvals:** Introduced structured workflows for payables, receivables, and journal entries, ensuring stronger financial controls.
- **Custom Enhancements:** Developed a custom Sales Team and Commission Report feature, eliminating the manual processes that previously slowed down the business.
- **Banking & Reconciliation:** Migrated multiple bank accounts and enabled monthly automated reconciliation.
- **Training & Support:** Provided comprehensive training through WebSan University and Jet Reports training, supported by a Customer Care package for ongoing optimization.

The Results

The move to Dynamics 365 Business Central delivered transformative results:

- **Automated Commission Reporting:** Eliminated hours of manual work, saving time and reducing errors for nearly half the workforce.
- **Modern Cloud Solution:** Provided flexibility with web and mobile access, ensuring staff can work from anywhere.
- **Stronger Financial Controls:** Approval workflows improved accountability and compliance across financial processes.
- **Better Business Insights:** Real-time reporting through Jet Reports empowered leadership with data-driven decision-making.
- **Future-Ready Platform:** With scalable cloud technology, the organization is now equipped to adapt quickly to future business needs.



To learn more about
Dynamics 365 Business
Central visit
www.websan.com