



Dynamics 365 Business Central Upgrade and Data Migration Services Help a Media Publishing Company Connect Data Across their Business and Drive Better Efficiencies

CASE STUDY

Customer: The parent company of preeminent lifestyle media brands in Portland, Seattle, Houston, Aspen, Vail, and Park City

Industry: Publishing

Profile: The media company produces the finest lifestyle content available using exceptional and award-winning design and tailors it to fit every storytelling medium, be it web, print, email, tablet, or social media

Services: Upgrade from Dynamics GP to Dynamics 365 Business Central

Business Need

The media company was using a slow and outdated version of Microsoft Dynamics GP that restricted business agility and was ill primed for scalability. They wanted to upgrade from Microsoft Dynamics GP to Microsoft Dynamics Business Central and migrate detailed legacy system data including individual transactions via custom solutions to Microsoft Cloud.

The company was looking to partner with a qualified Microsoft-certified provider who could help them upgrade to a cloud-based platform, eliminating the need for in-house server and associated maintenance. They were also looking to integrate the Business Central platform with their CRM to improve marketing effectiveness as well as boost lead tracking and conversions.

The media company partnered with Synoptek for the Dynamics 365 upgrade and data migration requirement.

Solution and Approach

To ensure the media company achieved the upgrade and migration goal, Synoptek made sure everything in the current system was transferred over properly and that the new system had the same ledgers, transactions, and reports. We also ensured that the staff that needed to use the new system was properly trained to do so. Additionally, Synoptek established a robust integration between Business Central and their CRM, allowing two-way communication between the two platforms.

Synoptek helped in setting up Dynamics Business Central as well as in guiding the media company through the migration process. As part of the engagement, we:

- Evaluated the current database for compatibility with Business Central
- Setup Business Central admin accounts and licenses
- Created users and roles inside Business Central
- Migrated data from the Dynamics GP Server and manipulated it for import into Business Central
- Tested data migration for consistency with the current Dynamics GP system
- Switched over to Business Central from the retired Dynamics GP server
- Trained and supported staff on the new system

We incorporated the following features into the Business Central environment:

Dynamics Essentials

- Sync to Microsoft Common Data Service
- Change log/audit trail
- Job queue
- Role-based security
- Robust customization and report-writing
- Microsoft Office integration, templates, and exports

Finance Essentials

- Ledger, periods, closing
- Chart of accounts
- Financial Statements, schedules, reporting
- Financial dimensions and hierarchies
- Cash Flow Report with Forecast
- Bank Reconciliation
- PayPal integration
- Sales Tax by Locations
- Allocations management
- A/R Invoices with Cash Receipts and Credit Memos
- A/P Invoices with Cash Disbursements and Debit Memos
- Budgeting

Trade Management

- Credit Card Processing (via Extended Solution from ChargeLogic)
- Document Reports for Trade -Sales Invoice and Purchase Order

Human Resources

- Import Payroll Journal Entries from Payroll Service

Business Benefits

With Synoptek's support and guidance, the media company was able to move away from their slow and unresponsive Dynamics GP system to a modern, feature-rich Business Central system. The upgrade not only helped the company in leveraging the latest ERP capabilities; it also allowed them to connect data across their finance, accounting, sales, purchasing, and inventory processes to make better decisions and facilitate continued growth.

About Synoptek

Synoptek is a global systems integrator and managed IT services provider, offering comprehensive IT management and consultancy services to organizations worldwide. The company works in partnership with clients of all sizes – from mid-market to Fortune 100, and for over two decades, its focus has been to provide maximum business value to its clients, by enabling them to grow their businesses, manage risk and compliance, and increase their competitive position. Synoptek is committed to delivering improved business results and unmatched service to every client, every time.

19520 Jamboree Road #110 Irvine, CA 92612

888.796.6783

www.synoptek.com

salesinquiries@synoptek.com

