Synoptek

Case Study

Dynamics 365 Business Central Support and Managed Services Help a Window & Door Manufacturer Accelerate Financial Close and Scale Growth

Customer Overview

Customer

A leading manufacturer of vinyl windows and doors

Profile

Offering four distinct brands, the manufacturer's products exceed industry standards while offering countless design possibilities to match any home decor and lifestyle

Industry

Building materials

Services

Dynamics 365 Business Central Implementation and Managed Services

Business Need

The manufacturer was on a growth path, improving its production capabilities to lead the region with high-quality vinyl windows and doors for residential and multi-family homes. However, its existing accounting system based on QuickBooks lacked the functionality and integration capabilities needed to support its growth over the long term.

Additionally, its existing chart of accounts was one-dimensional, limiting financial insights. The client was eager to improve processes like bank reconciliation and sought to transition to a system that would support its long-term growth while enhancing financial reporting capabilities.

It wanted to automate manual processes occurring outside its ERP and integrate budgeting into the system. This would streamline operations, reduce the reliance on external tools for key financial functions, and tighten month-end close.

The client also aimed to automate fixed asset management and improve trade management processes, including sales invoicing, purchase orders, shipments, and receipts, ensuring better overall operational efficiency.
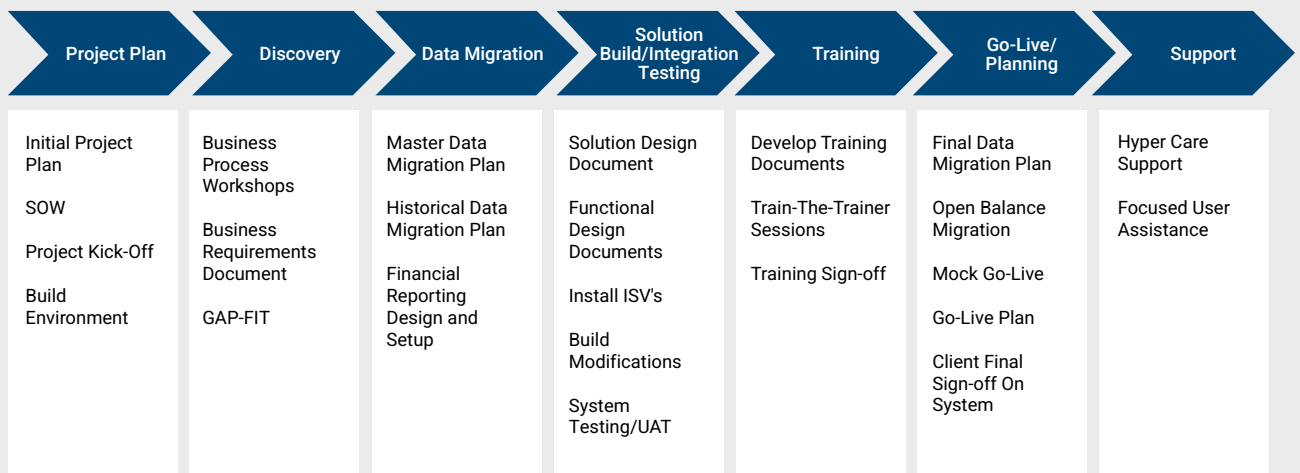
Given these challenges, the client was looking to implement a modern, cloud-based accounting platform with a full chart of account capabilities, financial reports, and a back-end architecture to support growth and scalability.

Solution and Approach

Synoptek partnered with the client and gained a deep understanding of current business challenges through initial discovery, product demonstrations, and informal conversations with various stakeholders.

During these sessions, Synoptek interviewed selected users, producing objectives to change/improve the current platform deployment. Based on this understanding, we proposed implementing Dynamics 365 Business Central, providing a list of common features and functionalities that would best fit business objectives.

Project Management Methodology - Milestones and Toll Gates

Project Plan	Discovery	Data Migration	Solution Build/Integration Testing	Training	Go-Live/ Planning	Support
Initial Project Plan	Business Process Workshops	Master Data Migration Plan	Solution Design Document	Develop Training Documents	Final Data Migration Plan	Hyper Care Support
SOW	Business Requirements Document	Historical Data Migration Plan	Functional Design Documents	Train-The-Trainer Sessions	Open Balance Migration	Focused User Assistance
Project Kick-Off	GAP-FIT	Financial Reporting Design and Setup	Install ISV's	Training Sign-off	Mock Go-Live	
Build Environment			Build Modifications		Go-Live Plan	
			System Testing/UAT		Client Final Sign-off On System	

Business Central Implementation

Utilizing our global services delivery model, we provided experienced resources to implement the Microsoft Dynamics 365 Business Central instance. This included:

- **General**
    - Role-based group interface and permissions
    - Tablet and phone apps for Android and iOS
    - Microsoft Office integration
    - Data migration templates
    - Customer and vendor portals in SharePoint

- **Trade management**
    - Sales and purchase orders, shipments, receipts, invoices, return orders, credit memos
    - Inventory management by location with SKU and assemblies
    - Item attributes, reorder points, serialized inventory, lot tracking
    - Order management & RMA

- **Finance**
    - Ledger, accounting periods, closing entries, and prior period entries
    - Chart of accounts with categorization for reporting
    - Financial dimensions and hierarchies
    - Cash flow reporting
    - Bank reconciliation
    - A/R sales invoices and journals
    - Customer and vendor prepayments
    - A/P purchase invoices and journals
    - Fixed asset management

Business Central Managed Services

Synoptek assigned a tier-1 resource to triage and work on high-priority issues identified by the client, a competent tier-2 techno-functional Dynamics specialist with knowledge of the client's specific implementation to support escalations, and an experienced tier-3 engineer with technical expertise in Microsoft Dynamics technologies available for escalation should more specialized expertise be needed.

- **User Support:** Synoptek delivered a range of support services, including user training, user issues, roles management, security management, database audit trail, data management, data configuration, and bug fixes.

Security Rights	Workflow Administration	User Training
• New user creation • User rights modification Role creation/modification • Users enable/disable • Role enable/disable	• Adding new users • Modification of the user assignment • Additional flow or conditions • Version management	• Process walkthrough • Troubleshooting user functional issues • Configuration understanding • Validation of the results • New user training

Administration Task	Data Configuration	User Management
• Database log management • Notification cleanup • Integration verification • Batch job process Workflow verification • Emails and alerts • Alert management	• Managing data template • LCS management • Configuration changes • Code management	• Personalization • Dashboard • User options • Task recorder

- **Incident Management:** We offered various incident management services to repair and resolve problems according to the agreed-upon SLAs. The resolution included temporary workarounds until the issue can be permanently resolved, as well as the complete and final resolution.

    o   Data correction

    o   Transaction issues

    o   Modification to the report or query

    o   Integration issues

    o   User training or support

Business Benefits

The implementation and ongoing support of Dynamics 365 Business Central has opened doors to several benefits for the manufacturer. With the new system in place, the client can:

• Shorten the month-end closing process, creating accurate and up-to-date financial records.

• Automate several day-to-day processes across accounts payable, accounts receivable, and general ledger done in Excel while consolidating and managing them using a single platform.

• Unearth insights and analytics into financial performance and make better decisions using up-to-date and accurate financial information.

• Simplify asset management, ensuring accurate depreciation calculations and improved compliance with accounting standards.

• Enhance cash flow management through better visibility into receivables, payables, and cash positions.

• Streamline reconciliation procedures to improve accuracy and reduce errors.

Today, the client can efficiently create and manage budgets, track financial performance, adjust forecasts based on real-time data, and position the business for better scalability and future business growth.

About Synoptek

Synoptek delivers accelerated business results through advisory-led, transformative full-life-cycle systems integration and managed services. We partner with organizations worldwide to help them navigate the ever-changing business and technology landscape, build solid foundations for their business, and achieve their business goals.