Company

Medium Sized Power Generation

Houston, Texas

Industry

Energy

Dynamics 365 Business Central Implementation for an Energy Company in Latin America

Background

An upcoming organization in the energy sector with multiple entities had implemented Dynamic 365 for Finances, CRM, and Inventory. The business had technical challenges in scaling the solution and managing routine operations.

Apps4Rent's Solution

Apps4Rent engineers used deep technical expertise and appropriate tools to troubleshoot technical issues and helped the organization exploit capabilities in Dynamics 365 to a greater extent.

Result

The organization, which had a Dynamics 365 subscription for over a year, and could not take advantages of its capabilities because of technical challenges, not only overcame the hurdles in configuring and customizing the solution but also expanded the scale of the project to add seven more entities with Apps4Rent's assistance.

Background

A newly-formed energy company with an office in Texas, U.S, and power plants in Latin America, was looking for a cloud-based solution with modules for managing finances, CRM, and Inventory. As it was a new business, the organization did not have a current solution in place to meet its requirements. The stakeholders were, however, aware that handling and processing finances manually would be tedious and error-prone, particularly because there were already 30 employees.

The organization was exploring various options, and was particular about the security systems, given that it was a cloud-based solution it was looking for. It also needed a system that could accommodate separate books, possibly for legal entities in different countries, that could be consolidated according to an organizational chart.

Choosing Dynamics 365

The employees in the organizations were already using Microsoft Office 365 and were happy with the solution. The key stakeholders were aware of Dynamics 365 as a Microsoft solution that could cater to their requirements but had never used it before. Dynamics 365 offers a wide range of solutions, and the organization was unsure of the solution that could fit their requirements. Besides, they had concerns about the security capabilities in Dynamics 365 as they planned to use it for multiple legal entities. Consequently, they were looking for assistance from a Microsoft Partner who could help them with the right solution.

Apps4Rent Assistance for Dynamics 365 Implementation

The energy company had identified Apps4Rent as one of the few Microsoft Partners who could help them with Dynamics 365 from Microsoft's official marketing channels. Apps4Rent Dynamics 365 product specialists scheduled a call with the Controller in the organization to understand their requirements. Our experts gathered that the stakeholders needed demos of the appropriate modules to perform a cost-benefit analysis to make an informed decision and then implementation assistance for the right solution.

Based on the requirements, Apps4Rent identified both Dynamics 365 Business Central Essentials and Dynamics 365 Business Central Premium to be a good fit and offered free setup as there was no migration. However, the business purchased its Dynamics 365 subscription directly from Microsoft and ran into issues while trying to configure and customize the solution for generating financial reports, such as balance sheets and income statements, and approached Apps4Rent again for assistance.

> *"I'd like to connect back with you, because I would like to switch providers for our app. There's customization to be implemented and I would like to have a regular date set every month for technical support."*
>
> Giselle, Controller

Dynamics 365 Customization Challenges

As versatile as Dynamics 365 might be for a full-featured business management solution, customizing the solution requires significant expertise, especially for unique use cases. In this case, the organization had set up two legal entities and had not uploaded data for over a year. The users were encountering errors while performing operations such as adding fixed assets. While their team did receive training to set up more entities, they were unable to get through the building the system phase. Moreover, in the current implementation architecture, their payment process involving their bank bypassed Dynamics 365. They were also using an expense report tool that was not connected with the system. The organization had approached other experts who had suggested cumbersome solutions that were expensive and difficult to implement.

Troubleshooting Dynamics 365 Customization Challenges

After the company had tried various approaches and consultants to resolve their issues without much success, they approached Apps4Rent for technical and functional support almost after a year since they had first contacted for implementing Dynamics 365. Apps4Rent engineers advised the stakeholders to switch their Dynamics 365 subscription to Apps4Rent tenancy for better visibility and control while providing support on an hourly basis. Assistance was provided in processing the Finance module, and the engineers were able to create the entities in the stipulated time and import the data from the expense management system to Dynamics 365. Finally, finiancial reports could be cross-checked to make sure that the correct balance sheet and income statement reports were generated as per their audited results . The energy company continues to engage Apps4Rent for helping them with the more complex customizations.

Conclusion

As a subscription-based service, not taking full advantage of Dynamics 365 capabilities for almost a year was proving to be expensive for the energy management company that was only a few years old. Thankfully, approaching Apps4Rent at the right time helped them save costs and implement a solution that was far more efficient than what they had built in-house. The fact that the organization decided to extend the tenure for technical support for several months with Apps4Rent while switching their vendor not only indicates the complexity of implementing Dynamics 365 but also stands testimony to the technical prowess of Apps4Rent engineers in solving complex issues. Now they rest assured that they are supported by a Tier 1 Microsoft CSP that can provide round-the-clock technical support via phone, chat, and email for Dynamics 365 and other Microsoft cloud solutions.