



CLIENT SOLUTION CASE STUDY

Western Bankers Cashes in on a Successful Dynamics SL to 365 Business Central Cloud Migration

MICROSOFT DYNAMICS 365
BUSINESS CENTRAL

Challenge

A long-time user of Microsoft Dynamics SL, Western Bankers learned that Microsoft would stop providing mainstream support of the product in 2023. “When I first came onboard at Western Bankers, I recognized the on-premise SL solution to be old architecture—it didn’t have a lot of great features,” says Western Bankers CFO Rich Mize. “It was a matter of getting the other users on board for a change—sometimes it’s scary to think about learning a new solution,” continues Mize. Mize had gone through previous systems upgrades and knew that a cloud-based solution would be a better option for Western Bankers. “My explanation to the team was that there would be a lot of new features and functions we could take advantage of in an upgraded system,” says Mize. “Why use an outdated car with an eight-track in it when there are other, more modern solutions out there?”

The team at Western Bankers was having difficulty completing basic financial functions such as pulling vendor reports and ended up using Excel spreadsheets for a lot of manual work. “We were dumping cash disbursements into Excel, and then manually sorting them for bank reconciliation,” says Mize. The team was also managing fixed assets in spreadsheets as well as other tasks. “Any CFO article will tell you that wherever you have manual, spreadsheet-driven processes, it’s dangerous territory,” says Mize.

CLIENT OVERVIEW



Western Bankers is one of the largest banking trade associations and regional educational organizations in the United States. Headquartered in Sacramento, California, Western Bankers offers dynamic conferences, training seminars, nearly 150 webinars a year and enhanced education for member banks. Western Bankers also provides its members with preferred pricing for products and services that can both improve operations and save money through its Strategic Partner program. The mission at Western Bankers is to provide resources and innovative solutions that will help its members prosper and grow.

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Less Expensive to Stay in the Microsoft Family

Western Bankers considered other products like NetSuite, but in the end, because they were using Microsoft Dynamics 365 for CRM, it made sense to upgrade to Microsoft Dynamics 365 Business Central. “We hired another firm to create an API for the CRM software to integrate to SL, and it was costly to maintain, especially during upgrades,” says Mize. “By staying in the Microsoft family, that cost of the integration would go away,” says Mize. “NetSuite has a nice product but compared to the cost of BC and the built-in integration, I didn’t see us getting a whole lot more,” continues Mize.

Solution

Western Bankers selected to upgrade to Microsoft Dynamics 365 Business Central in the cloud for general ledger, cash disbursement, accounts payable, bank reconciliation, fixed assets, and financial reporting, integrated with Microsoft Dynamics CRM for customer management, billing, collection and invoicing. The team is also using Mekorma for check signing. “We work remotely a lot, and it’s so nice to not have to be in the office when we need two signatures on a check,” says Mize. Solver reporting rounds out the solution for more robust reporting.

Smooth Ground to Cloud Upgrade

Western Bankers upgraded to BC in what turned out to be a very hectic time for the company. “We had an audit, had to prepare our tax return, and then a second audit during the time that we were upgrading,” says Mize. **“We were very lucky to have an awesome consultant – I really can’t sing her praises enough. She is an expert at what she does, is great at customer service, knowledgeable, and skilled. I wrote a letter to her manager bragging on her, and my whole team signed it. She is thinking, ‘I’m not a superhero,’ but to us, she is,”** continues Mize.

Velosio’s experience with SL was helpful to the Western Bankers team. “We were used to doing some things in SL, like the menu format, which in BC, is a search window,” says Mize. “Our consultant preemptively made us aware of this feature change which helped with the transition. The search window has become one of our favorite tools in BC,” continues Mize.

During the upgrade, Western Bankers and Velosio had a weekly Monday meeting to discuss upcoming tasks on the cutover list. “At first I was annoyed that we had to pull together migration worksheets, but then I realized that it was saving us money to complete this task instead of the Velosio team,” says Mize. “Our consultant was great at assuaging our concern, though, assuring us that we would get through it together,” says Mize. Velosio has a portal for Western Bankers with

all training meetings recorded on Teams. “This is very helpful to have, and we referred back to the training sessions a lot as we were first learning the system,” says Mize.

Business Benefits

Western Bankers experienced business benefits in moving from SL to Business Central, including:

- Automated, faster bank reconciliation
- Financial information at fingertips for easy search during audit and tax preparation
- Automated manual fixed assets process
- Mekorma for digital signatures allows for check signing on the go
- Cloud has built in security and allows for remote work
- Upgrades are a breeze
- Search window makes it easier to find things
- More robust reporting with Solver

“Overall, we are happy with the product, but if I can log a complaint, it would be nice to have a check box for reversing journal entries,” says Mize. “There is another way to do it in the system, but clicking a box would be so much easier,” continues Mize. Although Western Bankers has more robust reporting with Solver, the team wishes that the solution was baked into BC instead of having to use a third-party solution. “A lot of the new architecture in BC is standard now, but we didn’t realize how much we were missing with the old product,” says Mize. “It’s kind of like power seats with heating and cooling built into your car – you didn’t know you needed it, but now you count on it,” laughs Mize.

Future Plans

The Western Bankers team is very happy with the upgrade—even those who resisted change at the beginning. While still getting used to the new system, Western Bankers is trying to find ways in which they can automate prepaid expenses which is still managed in Excel. “If we have an upcoming conference for which we’ve paid a deposit, this expense may need to be dispersed over 18 months or more. Every time we have turnover, the spreadsheets are lost. It’ll be nice to automate one more thing to save time and replace error-prone processes,” concludes Mize.



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