Client Success Journey: Streamlining Operations & Financial Controls for a Healthcare Tech Company

WebSan®
Solutions Inc.

Industry

Healthcare Technology

Background

A prominent player in the healthcare technology sector approached us with the challenge of modernizing their financial and operational systems. Their existing on-premise solution was limiting their ability to scale, streamline processes, and generate real-time financial reports. They needed a cloud-based solution to improve financial controls and reporting capabilities across their entire enterprise.

Objectives

- Establish a cloud-based accounting system to enable efficient financial reporting.
- Enhance financial controls and reporting capabilities to support decision-making.
- Improve operational efficiency across financial, sales, and supply chain processes.

Implementation Journey

Analysis Phase

During this phase, we conducted a thorough analysis of the client's existing systems and processes. We identified the key areas where improvements were needed and mapped out a comprehensive plan for transitioning to a cloud-based solution.

Design and Development Phase

We implemented Microsoft Dynamics 365 Business Central as the core solution, tailoring it to meet the client's specific needs. Key modules included:

Financial Management
Transitioned their general ledger, accounts payable, and accounts receivable processes to Business Central. This included setting up budgeting, cash flow forecasting, and bank reconciliation for multiple accounts.

Supply Chain Optimization
Implemented our WebSan Supply Chain Accelerator to streamline inventory management and vendor relations.

Jet Reports
Integrated Jet Reports for enhanced financial and operational reporting, providing the client with over 80 report templates for income statements, balance sheets, and cash flow analysis.

Customization
Developed custom features, such as automatic cost center dimension creation upon new customer setup, to enhance financial tracking and reporting capabilities.

Deployment Phase
We deployed the solution across their organization, ensuring a smooth transition with minimal disruption to their operations. Our team worked closely with the client's personnel, providing guidance and support throughout the deployment process.

Go-Live and Training
The solution went live on schedule, with users across the organization successfully adopting the new system. To facilitate this, we provided extensive training through our WebSan University platform, ensuring all users were proficient in using the new system.

Post-Implementation Support
Following the go-live, we continued to support the client with our Customer Care Program. This included ongoing assistance with system troubleshooting, report customization, and periodic reviews to ensure the system continued to meet their evolving needs.
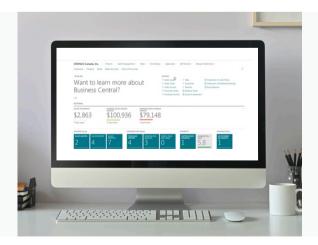
Apps Utilized

Jet Reports - Financial & Operational Reporting Tool

This tool was instrumental in providing comprehensive financial and operational reports, which improved decision-making across the organization.

WebSan's Electronic Banking App

This app enabled streamlined payment processing, including both cheque and ACH transactions, and improved the efficiency of their accounts payable processes.

WebSan's Supply Chain Accelerator Package - Starter Plan

This package optimized the client's supply chain management, reducing costs and enhancing the usability of their Business Central environment.

Outcome

The healthcare technology company now operates with a modern, cloud-based ERP system that supports real-time financial reporting and improved operational efficiency. The transition to Dynamics 365 Business Central has empowered them to scale their operations, reduce manual processes, and make data-driven decisions with confidence. This success story demonstrates our commitment to delivering tailored solutions that address our clients' unique challenges and drive measurable results.

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