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# **Empowering Financial Growth: How a Non-Profit Transformed Operations with Dynamics 365 Business Central**

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## Industry

Non-Profit

## Background Challenges

- The client, a well-established non-profit organization, was facing challenges with their existing financial system (QuickBooks), which lacked scalability and reporting capabilities.
- They struggled with manual financial reporting, payment processing inefficiencies, and integrating donation data from Salesforce into their financial records.
- Their goal was to improve financial controls, streamline reporting, and align financial operations with their donation management system.



## Solution Provided

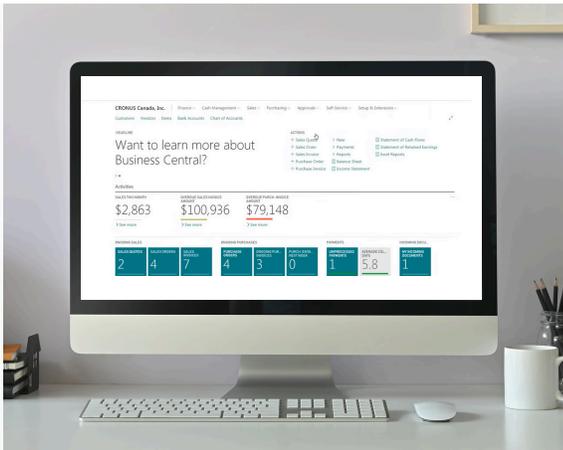
<b>ERP Implementation</b>	WebSan Solutions implemented <b>Microsoft Dynamics 365 Business Central</b> as the central financial system.
<b>Financials Module</b>	Included General Ledger, Bank Reconciliation, Allocations, Budgets, and Dimensions (Department, Fund Tracking).
<b>Accounts Payable Module</b>	Automated vendor management and payment processing through EFT, credit card, and cheque.
<b>Jet Reports</b>	Over 30 customizable financial reports were set up, including Income Statements, Balance Sheets, and Cash Flow reports.
<b>Salesforce Integration</b>	Implemented the <b>Unitech Salesforce Connector</b> to automate the import of donation data into Business Central.
<b>Training</b>	Client personnel were trained using <b>WebSan University</b> and guided through minor system customizations.

## Outcome

<b>Improved Financial Control</b>	The non-profit now has real-time insights into their financial status, enabling better decision-making with accurate, up-to-date financial reports.
<b>Efficiency Gains</b>	Manual processes for payment processing and financial reporting were replaced with automated workflows, significantly reducing the workload and errors.
<b>Seamless Data Integration</b>	The Salesforce Connector ensured that donation data flowed smoothly into the financial system, aligning operations and providing a complete view of the organization's finances.
<b>Scalability</b>	The system is now scalable, able to grow with the organization, and flexible enough to accommodate future customizations and additional reporting needs.

## Conclusion

WebSan Solutions' implementation of **Dynamics 365 Business Central** enabled the client to transform their financial operations, making them more efficient and scalable. With integrated reporting, automated workflows, and enhanced financial controls, the non-profit is now better equipped to manage their finances.



To learn more about  
Dynamics 365 Business  
Central visit  
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