Velosio®

CertaPro Increases Staff Capacity with Express Microsoft Dynamics Business Central Implementation

MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

Background

Founded in 1992, CertaPro Painters® focuses on providing customers with an extraordinary experience. Whether that project is in a home or commercial property, what matters most is the client's complete satisfaction. Everything they do, their whole reputation, is about ensuring a successful project for the customer.

www.certapro.com

Business Challenges

For a services firm like CertaPro, success depends on how effectively and efficiently they manage projects and serve customers. Yet, like many services firms, CertaPro struggled with siloed business systems and disconnected technology that kept them from achieving their goals. Additional challenges included optimizing staff utilization, predicting cash flow and resource demands, managing project regulatory compliance, and responding to ever-higher customer expectations. An outdated ERP system meant that many processes were completed outside the system with a heavy reliance on cumbersome spreadsheets.

CertaPro started their search for a new, integrated ERP system by looking at Sage and Microsoft Dynamics Business Central with Velosio and another partner. Velosio brought in a subject matter expert to walk through the technical aspects of the BC solution and describe what was possible.

OVERVIEW

Software Solutions:
- Dynamics 365 Business Central
- Solver package
- Wipfli InvoiceConnect and ExpenseConnect
- Power Automate

Challenges:
- Manual Processes
- Disconnected Systems
- Reporting and Insight Constraints

Benefits:
- Leverage Data for Better Decisions
- Empower Business Innovation and Growth
- Capitalize on Cloud Technology
- Better Customer Experience

Company Overview:
Residential and commercial painting services company.

Industry: Services
Employees: 80
Headquarters:
Audubon, Pennsylvania
Annual Revenue: $50.9M

"This technical walk-through helped us gain confidence in Velosio's abilities," says Jason Seward, director of accounting for CertaPro. "I felt like the statement of work was complete, and after choosing Microsoft Dynamics BC and Velosio, the transition from sales to services was smooth," continues Seward.

Dynamics BC Express Implementation

CertaPro elected to go with Velosio's BC Express Implementation, a fixed-price, 90-day implementation which reduces system customization and configuration timelines and investment by 20-30%. To the standard implementation, CertaPro added deferral templates to defer revenue recognition for franchise fees, and added Solver, Wipfli InvoiceConnect and ExpenseConnect, and Power Automate functionality to push a CRM invoice to BC. Solver streamlines data load movement across CertaPro's applications. InvoiceConnect and ExpenseConnect enables CertaPro to simplify and streamline the integration of invoice and expense data between SAP Concur Invoice, SAP Concur Expense, and BC. This

additional functionality would ensure a complete, integrated end-to-end solution.

"Our implementation manager, Lynn, was a huge help...she made it easy," says Seward. "I liked that Velosio had an SME for every different part of the project, and someone in my time zone," continues Seward. The CertaPro team felt well supported for go-live. "My job was to keep the team calm, since we have a five-day month-end close," laughs Seward.

BC Benefits

By automating many manual tasks, and integrating solutions, CertaPro now has:

- Increased Staff Capacity and Efficiency
- Automated manual clerical duties
- Automated payables with InvoiceConnect
- More time for reporting
- Extra capacity allows more time for financial planning and analysis

CertaPro has an ongoing service agreement with Velosio if any issues arise. "I would pick Velosio again if I had it to do all over again," concludes Seward.

Discover how Velosio can help your business with Microsoft Dynamics 365 business applications.

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