



Case Study: **CIMSENSE**

Streamlining a Multi-Company Manufacturing Operation with a Unified Dynamics 365 Business Central Platform >

Executive Summary

CIMSENSE, a specialized manufacturer and distributor, faced significant operational hurdles managing five distinct companies on separate, legacy QuickBooks instances. This fragmented approach led to inefficiencies, a lack of centralized data, and limited scalability for their growing business. To unify their operations and gain enterprise-level insights, CIMSENSE partnered with **Cambay Solutions**, a Microsoft Solutions Partner, to execute a large-scale migration to **Microsoft Dynamics 365 Business Central**. This complex project involved consolidating five entities, implementing advanced EDI processes, and creating custom analytics, all within a single, cloud-based ERP system.

The Result: A fully integrated operational framework that enhances financial clarity, automates critical business processes, and provides a scalable platform for future growth.

The Challenge:

Fragmented Systems Hindering Growth and Efficiency

Operating five companies on isolated QuickBooks systems created a web of operational challenges for CIMSENSE:

- **Data Silos & Inefficiency:** Lack of a unified system made consolidated reporting and inter-company financial tracking a manual, time-consuming process, hindering strategic decision-making.
- **Limited Process Automation:** QuickBooks could not support complex, automated workflows required for modern manufacturing and distribution, such as integrated EDI for order processing and advanced shipping calculations.

- **Lack of Real-Time Visibility:** Critical inventory data was spread across multiple systems, making it difficult to get a real-time, accurate picture of stock levels, order status, and overall business performance across all entities.
- **Scalability Concerns:** The existing infrastructure was not built to support the company's ambitious growth plans and increasing transaction volumes, acting as a barrier to expansion.

The Solution:

A Comprehensive, Phased Migration to a Unified Platform

Cambay Solutions designed and executed a meticulous, multi-phase migration strategy to Dynamics 365 Business Central, chosen for its deep integration capabilities and robust feature set for manufacturing and distribution.

The implementation encompassed:

- **Multi-Company Consolidation:** A sequential migration strategy for all five companies, starting with a pilot to identify and resolve common issues before rolling out to the remaining entities, ensuring a smooth and controlled transition.
- **Advanced EDI Integration:** Implementation of a comprehensive EDI solution to automate the exchange of critical documents (like Purchase Orders [850], Invoices [810], and Ship Notices [856]) with customers and suppliers, reducing manual entry and errors.
- **Custom Business Intelligence:** Development of a custom Power BI report to replace a critical manual spreadsheet, providing real-time, "what-if" analysis for inventory levels, sales forecasting, and minimum requirements directly within Business Central.
- **Process Automation:** Configuration of core financials (AP, AR, GL), inventory management, and the implementation of a specialized shipping and tracking extension to streamline logistics.

- **End-User Enablement:** Comprehensive training programs tailored for different user roles across all five companies, ensuring smooth adoption and maximizing the return on investment.

Key Engagement Highlights

- **Platform:** Microsoft Dynamics 365 Business Central
- **Scope:** Migration of 5 separate companies from QuickBooks to a unified D365 BC environment
- **Data Volume:** Migration of over 2.1 million records
- **Project Hours:** 1,605 hours
- **Team:** A dedicated Cambay team including a Senior Program Manager, Solution Architect, and Senior Consultants.

The Results:

Unified Operations and Data-Driven Decision Making

The successful implementation delivered transformative outcomes, positioning CIMSENSE for scalable growth:

- **Unified Financial Operations:** Consolidated financial reporting and management for all five companies provides leadership with a holistic, real-time view of the entire business's performance.
- **Dramatically Increased Efficiency:** Automated EDI processes and streamlined workflows eliminated hundreds of hours of manual data entry, reduced errors, and accelerated order-to-cash and procure-to-pay cycles.
- **Enhanced Inventory Intelligence:** The custom Power BI report provides actionable insights into inventory levels, demand forecasting, and supply chain logistics, enabling smarter, more profitable decision-making.
- **Scalable Foundation for Growth:** The modern, cloud-based platform can easily accommodate increased transaction volumes, additional users, and new business entities, supporting CIMSENSE's long-term strategic goals.
- **Reduced Operational Risk:** A structured, phased approach with rigorous testing ensured a smooth go-live for each company, minimizing business disruption.

Why Cambay Solutions?

As a **Microsoft Solutions Partner**, Cambay Solutions provided the perfect blend of deep technical expertise, complex project management, and an understanding of the manufacturing and distribution sector.

<p>Proven Methodology: A structured, phased approach using Azure DevOps ensured transparency, mitigated risk, and kept the complex, multi-company project on track.</p>	<p>Technical Excellence: Our team possessed the certified expertise to handle advanced integrations like EDI and develop custom analytics solutions with Power BI.</p>
<p>Partnership Approach: We functioned as a seamless extension of the CIMSENSE team, committed to their long-term success and operational goals.</p>	

"Managing five companies on separate systems was holding us back. Cambay Solutions didn't just migrate our data; they built us a powerful, unified operational platform. The automation and insights we've gained are already driving efficiency and growth across our entire business."

– **Brant Nelson**, CEO, CIMSENSE

About Cambay Solutions

Cambay Solutions LLC is a leading Microsoft Solutions Partner specializing in guiding organizations through digital transformation with the Microsoft Cloud. Our expertise in Microsoft Azure, Dynamics 365, and Microsoft 365 helps clients overcome disruption, streamline operations, and achieve their strategic goals. We combine technical excellence with industry insight to deliver measurable outcomes.

Ready to unify and modernize your operations?

Contact Cambay Solutions to discuss your ERP transformation journey.