



Case Study: ***OLI Systems***

Automating Financial Operations and Gaining Strategic Insights with a Modernized ERP Platform



Executive Summary

OLI Systems, a specialized organization in the advanced materials and chemicals sector, was constrained by manual, disconnected processes between its Sage 50 accounting software, Salesforce CRM, and Microsoft Word for invoicing. This inefficient workflow created data silos, hindered accurate financial reporting, and consumed valuable staff time. To modernize its operations, OLI Systems partnered with **Cambay Solutions**, a Microsoft Solutions Partner, to implement **Microsoft Dynamics 365 Business Central**. This strategic migration focused on automating core financial processes, integrating key systems, and establishing a modern, accrual-based accounting foundation to support future growth.

The Result: A streamlined, automated financial ecosystem that eliminates manual data entry, provides real-time visibility into operations, and creates a scalable platform for intelligent growth.

The Challenge:

Manual Processes and Disconnected Data

OLI Systems' reliance on a patchwork of disconnected systems created significant operational inefficiencies and strategic limitations:

- **Manual Invoicing Bottlenecks:** The process of creating sales invoices was entirely manual, requiring data to be transferred from Salesforce to Sage 50 and finally formatted in Word, leading to delays and a high potential for errors.
- **Limited Financial Visibility:** Operating on a cash-based system in Sage 50 restricted their ability to perform accurate accrual-based accounting, hindering cash flow forecasting, budgeting, and strategic financial reporting.

- **Data Silos:** Critical customer and financial data was trapped in separate systems (Salesforce and Sage), preventing a unified view of the business and forcing employees to waste time on manual reconciliation and data entry.
- **Lack of Integration:** There was no automated connection between their front-office Salesforce CRM and back-office financials, creating a disjointed operational experience.

The Solution:

A Focused, Integration-Led Migration to the Cloud

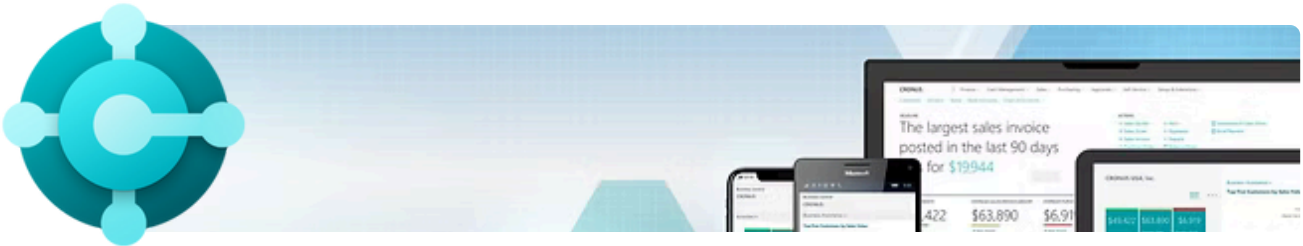
Cambay Solutions designed and executed a targeted implementation of Dynamics 365 Business Central, specifically engineered to automate OLI Systems' most critical pain points.

The strategic solution included:

- **Seamless Salesforce Integration:** Automated the flow of data from Salesforce directly into Business Central, triggering the automatic creation of sales invoices and ensuring customer data remained synchronized between the two systems, eliminating manual entry.
- **Modern Accrual-Based Financials:** Configured Business Central to support robust accrual accounting, enabling advanced cash flow tracking, budgeting, and financial reporting capabilities that were previously impossible.
- **Expense Management Automation:** Implemented and configured the Ramp ISV extension within Business Central to automate expense management and integration, streamlining another key financial process.
- **Strategic Data Migration:** Executed a careful migration of essential master and transactional data from Sage 50, including customers, chart of accounts, and open orders, ensuring business continuity.
- **Comprehensive User Training:** Provided tailored training for both administrative staff on financial management and technical staff on system administration, ensuring rapid adoption and proficiency.

Key Project Highlights

- **Platform:** Microsoft Dynamics 365 Business Central
- **Previous System:** Sage 50
- **Key Integrations:** Salesforce (Automated Invoicing), Ramp (Expense Management)
- **Project Hours:** 559 hours
- **Focus:** Financial Process Automation & Modernization



The Results:

Efficiency, Accuracy, and a Foundation for Growth

The implementation delivered immediate and transformative value, fundamentally changing how OLI Systems operates:

- **Dramatically Increased Efficiency:** Automated invoice generation eradicated hours of manual data entry per week, freeing staff to focus on higher-value strategic activities.
- **Enhanced Data Accuracy:** By eliminating manual transcription between systems, the integration significantly reduced errors, ensuring financial data and customer records are consistent and reliable.
- **Improved Financial Intelligence:** The move to a modern, accrual-based system in Business Central provided leadership with the accurate, real-time financial insights needed for smarter budgeting, forecasting, and decision-making.
- **Scalable Operational Platform:** The new, integrated environment provides a solid foundation that can easily support OLI Systems' growth, including potential future phases for project management and advanced analytics.
- **Reduced Operational Risk:** A structured implementation with rigorous testing ensured a smooth transition with minimal disruption to day-to-day business activities.

Why Cambay Solutions?

As a **Microsoft Solutions Partner**, Cambay Solutions provided the perfect blend of technical expertise, strategic insight, and a pragmatic approach to ERP implementation.

<p>Proven Methodology: A structured, phased approach ensured the project focused on delivering the highest-value outcomes first, providing a quick return on investment.</p>	<p>Integration Expertise: Our team possessed deep experience in connecting Business Central with key SaaS platforms like Salesforce, turning a complex technical challenge into a seamless business process.</p>
<p>Business-First Mindset: We focused on solving OLI Systems' specific business problems—manual invoicing and reporting—rather than just implementing software, ensuring the solution delivered tangible operational benefits.</p>	

"Our legacy systems were holding us back with manual processes and disconnected data. Cambay Solutions didn't just implement new software; they automated our core financial operations and gave us the insights we need to grow. The integration between Salesforce and Business Central has been a game-changer for our efficiency and accuracy."

– **CJ Gottuso**, CFO at OLI Systems

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 automate your operations and gain real-time insights?

Contact Cambay Solutions to discuss your modernization journey.