dogma group

William Purves Successfully Upgrades its NAV to Business Central

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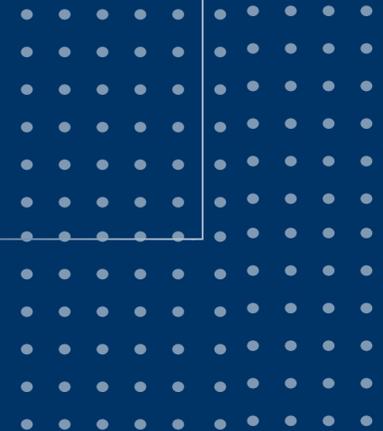
PROJECT OVERVIEW

Company Name:

WILLIAM PURVES
EST. 1888
FUNERAL DIRECTORS

Technology Included:

NAV to Dynamics 365 Business Central migration

Industry:

Funeral Service Providers

Country:

Scotland

ABOUT THE COMPANY

William Purves Funeral Directors is a well-known family-owned and run funeral service provider in the local communities across Scotland and North-eastern England. The company offers experience, patience, time, and support to bereaved families with compassion and respect.

William Purves focuses on the little details that matter the most, from providing a single point of contact during the funeral process to being available 24/7 for support throughout the year. Even after the funeral, the support does not stop with the company providing bereavement counselling one-on-one or in groups.

PROJECT SUMMARY

William Purves was looking to **migrate from Dynamics NAV to Dynamics 365 Business Central** to benefit from the latter's significant functional upgrades and could capabilities. The company wanted to move away from the limitations of NAV to gain cost efficiencies, improve collaboration, facilitate remote work, leverage AI and ML, enhance decision making, and get flexible scalability from Business Central.

Through our **product-agnostic** approach, the client found Dynamics Business Central to be the best-fit solution based on its existing requirements. Business Central is NAV's cloud version that comes with several new functionalities that enables companies to easily improve productivity and efficiency.

This NAV to Business Central migration project covered business functions, like purchase processing, accounts payable, sales invoice processing, account receivables, bank account management, document processing, VAT accounting, and returns to HMRC requirements, built on NAV.

These AS-IS processes were transferred into Business Central without deprecating any existing functionalities or adding new ones. However, minor changes had to be considered to support the old, customised NAV features, like VAT returns under (Making Tax Digital) MDT to HMRC, which were available out-of-the-box in Business Central.

William Purves also had one legal entity in NAV, which will be configured in the new system accordingly. For this, William Purves entrusted Dogma Group with its NAV to Business Central migration project, considering the expertise and effectiveness of the Dogma team.

Our experts not only understood the client's business processes but also adhered to its migration and new system requirements to facilitate a fluid transformation with trust.

All thanks to the Dogma experts, migrating to the new system was a clean upgrade experience for the client with all business processes remaining intact as it wanted, including its existing Continia and Andisio integrations.

The migration process was augmented by the involvement of Dogma's project management and change management teams to ensure project's efficacy and higher user adoption.

After the successful migration, William Purves gained access to a **modern cloud–based ERP** and all the advantages that come with it.

Compared to NAV, an on–premises legacy system, Business Central is more future–proof, flexible and scalable, thus, enabling the client to streamline processes, gain wider visibility into data, make smarter decisions, and, ultimately, accelerate growth.

RISK AND CHALLENGES

- **Dynamics NAV was a legacy on-premises solution that had limitations compared to modern ERPs like D386 Business Central.**

  With its NAV's gradual deprecation and no new NAV versions released after 13 December 2022, William Purves found it increasingly tough to breakdown data silos with integrations, get a complete view of its business, receive and implement timely system updates, automate workflows for efficiency, and share data seamlessly.

- **Migrating current and historical data from a legacy system to the cloud posed another challenge.**

  Although Dogma's in-house experts are very competent to handle the migration, it still required ample time and phased approach. But the project timeline was limited and thus required extra effort and priority for Dogma.

- **William Purves also wanted to keep its existing NAV functionalities intact when migrating to Business Central.**

  While it was not largely impossible, some customised features needed slight changes as they were available as out-of-the-box features in Business Central.

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APPROACH AND SOLUTIONS

To ensure the delivery of a robust system, Dogma used its tried and tested processes for this Business Central migration project. Starting from initial **discovery sessions** to understand the client's requirements and expectations, our experts mapped out all As-Is processes for migration.

This allowed us to figure out which processes could be readily migrated intact into the new system and those that needed changes. We then designed the **project blueprint** that detailed all technical design and development tasks based on which our functional and technical consultants followed the best practice for system design and implementation.

This helped William Purves avoid bespoke development where possible, thus, reducing the implementation and ownership costs.

Following that, Dogma assisted the client with **data migration** and **user acceptance** tests to ensure the delivery of highest standard solution. Concurrent to the technical project tasks, Dogma also implemented an effective change management program alongside project management activities to ensure the project's success.

That was augmented by **ongoing support services post-deployment** to allow William Purves to effortlessly tackle issues and enable Dogma to further optimise the new solution.

Discovery Sessions

Project Blueprint

Data Migration

User Acceptance Tests

Ongoing Support Services
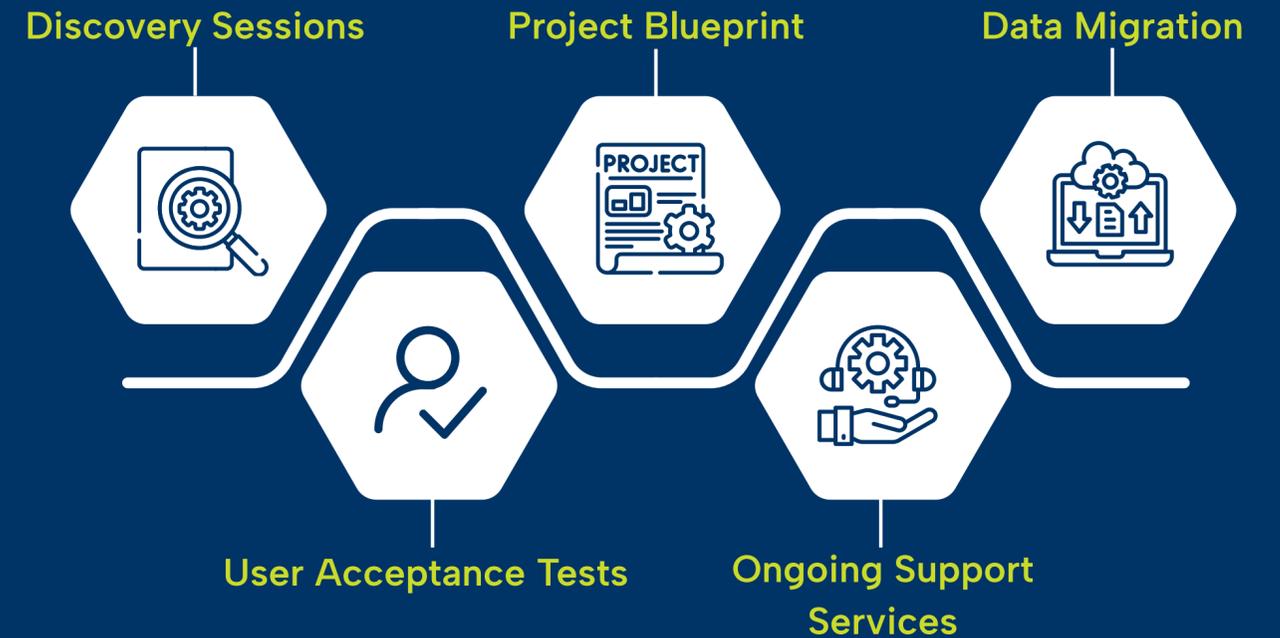
That was augmented by **ongoing support services post-deployment** to allow William Purves to effortlessly tackle issues and enable Dogma to further optimise the new solution.

Migrating to Business Central empowered William Purves to consolidate business processes and data to get a holistic view of its end-to-end processes, streamline workflows for added efficiency, get unified reporting across multiple functional areas, take informed decisions to drive growth, and reduce implementation costs and long-term cost of the system.

The client was finally able to better manage its ERP functions and ensure higher user adoption rate with user-friendly interface and effective training sessions.

RESULTS

Intact migration of business processes into Business Central from NAV with improvements

A holistic view of end-to-end processes and full, real-time reporting capabilities

A complete view of customer information from a single, integrated solution

Elimination of manual tasks and improved accuracy of information

Improved data integrity with reduced duplication, errors, and losses

Lower implementation and long-term ownership costs

Received a cloud solution with enhanced security, flexible access, and inexpensive scalability

KPIs

Reduction in average invoice cycle time by 22 days

Payment error rate down to 0%

Cost per invoice lowered by 75%

WHAT
OUR CLIENT SAYS

★★★★★

We are glad we approached Dogma. The Dogma team has been outstanding from beginning to end. They understood all our requirements and also kept us updated every step of the way throughout the project.

Thanks to Dogma, we now have a system that perfectly suits our company. It integrates seamlessly with our document capture solution and our Office 365 suite, which has really helped our finance team. Dogma's support team has also been really quick and quite effective with the tickets we raised.

– Shaun Donaldson, IT Manager
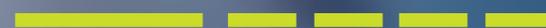
ABOUT
DOGMA GROUP

The Dogma Group is a progressive digital transformation company committed to delivering the digital imperative and becoming the most trusted advisor to its clientele.

In a hyper-connected world, with disruptive competitors and new business models we understand the need to deliver the digital imperative, i.e. fundamental action to adapt and remain competitive.

The Dogma group understands that each journey of digital transformation is unique for every client, and we ensure this through our philosophy of fluid transformation. Each solution is customised for organisations of all sizes, across industries and various life cycles. We innovate & strategize, create sustainable solutions, drive rapid returns on investment and create value from data.

Our passion for sustainability and its impact aligns us with the UN's sustainability goals and we actively encourage gender equality and diversity across our workforce.

TAKE THE NEXT STEP

Want to leverage our expertise for your next Project?

TALK TO THE EXPERTS

Don't take our word for it, call us today on 01296 328 689

to arrange a no-obligation demonstration.

dogma group

Transformations with Trust

We are committed to acting responsibly by integrating sustainability into every step of the business, including clients, partners' solutions, and the entire supply chain.

SUSTAINABLE DEVELOPMENT GOALS

Ready to embark on your

digital transformation journey?

dogma consultancy | Sirius app | dynamic ai | dogma international