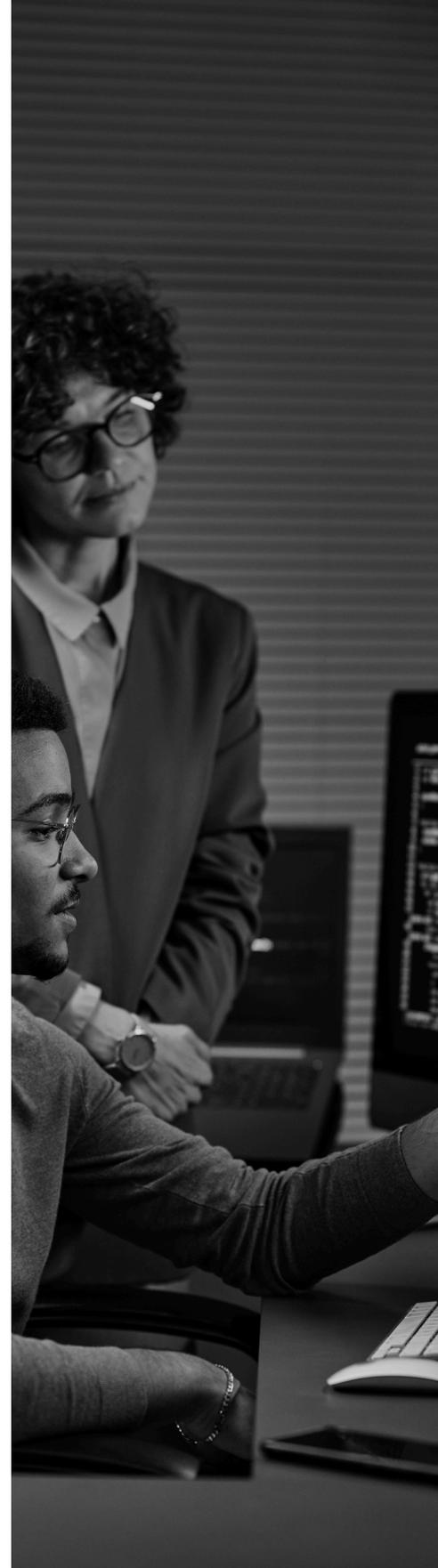




# Dynamics GP to Business Central Upgrade **Case Study**



ConnectWise PSA™ ↔ Business  
Central via **DynaConnect**





# A clear, risk-aware migration roadmap aligned with business priorities

# CASE STUDY

MANAGED IT SERVICE PROVIDER IN  
THE UNITED STATES



DynaConnect



SINCE 2013, OUR CLIENT - A WELL-ESTABLISHED MANAGED IT SERVICES PROVIDER IN THE UNITED STATES - HAS BEEN DELIVERING COMPLEX IT SOLUTIONS TO GLOBALLY RECOGNIZED BRANDS, INCLUDING DISNEY, SIKORSKY, AND UNIVERSAL STUDIOS. THE ORGANIZATION DEPENDED HEAVILY ON MICROSOFT DYNAMICS GP AS THE BACKBONE OF ITS FINANCIAL OPERATIONS.



# Client Overview

**Managed Service Provider (MSP)**

**United States**



**ConnectWise  
PSA™ & BC  
(Disconnected)**

**DynaConnect  
Integration**

**25-50  
Employees**



# Project Objectives



The organization needed a modern, cloud-based ERP platform that could support its growth, integrate seamlessly with its PSA system, and provide real-time financial visibility.

**ERP MODERNIZATION:** TRANSITION FROM DYNAMICS GP TO A SCALABLE, CLOUD-BASED ERP PLATFORM TO SUPPORT BUSINESS GROWTH.

**PSA INTEGRATION:** ENABLE SEAMLESS INTEGRATION BETWEEN ERP AND THE PSA SYSTEM FOR UNIFIED FINANCIAL AND PROJECT VISIBILITY.

**FINANCIAL VISIBILITY:** DELIVER REAL-TIME REPORTING & INSIGHTS TO IMPROVE FORECASTING & RECURRING REVENUE MANAGEMENT.

**PROCESS OPTIMIZATION:** STREAMLINE AND STANDARDIZE FINANCE OPERATIONS TO REDUCE MANUAL EFFORT AND OPERATIONAL COMPLEXITY.

**SCALABLE FOUNDATION:** ESTABLISH A SECURE, FUTURE-READY ERP PLATFORM TO SUPPORT EXPANDING SERVICES AND LONG-TERM GROWTH.



# Current Challenges

The transition from Dynamics GP to Dynamics 365 Business Central presented a multi-dimensional challenge

## LEGACY SYSTEM COMPLEXITY

- Over 20 years of historical financial data embedded in Dynamics GP
- Heavily customized finance and operational workflows developed over time
- Business-critical reports and processes tightly coupled with GP logic

## CONNECTWISE PSA™ & BUSINESS CENTRAL DISCONNECT

- Financial data from ConnectWise PSA™ was not synchronized in real time
- Manual intervention required for: Invoice posting , Revenue recognition, Cost allocation & Project and contract reconciliation
- Frequent mismatches between PSA billing and ERP financials
- Month-end close relied heavily on spreadsheets and manual checks

## INTEGRATION & ECOSYSTEM DEPENDENCIES

- Multiple third-party integrations supporting: Payroll, Inventory tracking & Customer-facing portals
- High dependency on these systems for daily operations, leaving little room for disruption

## CHANGE MANAGEMENT & RISK

- Finance and operations teams were cautious about moving away from a system they had relied on for decades
- Zero tolerance for downtime or billing errors
- Need for business continuity during migration and go-live

SOLUTION IMPLEMENTED

# DynaConnect

CONNECTING COONECTWISE PSA™ AND MICROSOFT  
DYNAMICS 365 BUSINESS CENTRAL



# Solution

The implementation followed four - phase process (Discovery & Gap Analysis, ConnectWise PSA™ & Business Central Integration Strategy, Intelligent Data Migration, Risk Management & Phased Rollout)



## DISCOVERY & GAP ANALYSIS

Conducted deep system and process discovery to map GP customizations, identify gaps, assess ConnectWise PSA™ dependencies, and define business-aligned success criteria.

## PSA-ERP INTEGRATION WITH DYNACONNECT

Implemented Madhda's native DynaConnect app to enable real-time, bi-directional integration between ConnectWise PSA™ and Business Central, eliminating manual reconciliation.

## INTELLIGENT DATA MIGRATION

Executed controlled, multi-cycle data migration with balance validation to ensure accuracy, auditability, and continuity of financial operations.

## PHASED ROLLOUT & RISK MANAGEMENT

Deployed the solution in phases with parallel runs, role-based training, and proactive risk controls to ensure adoption and minimize disruption.





# Outcomes



## **ACCELERATED FINANCIAL CLOSE**

Achieved a 25% faster month-end close, significantly reducing manual effort & finance team workload.

## **CLOUD-FIRST INFRASTRUCTURE**

Eliminated legacy on-prem systems, transitioning fully to a secure, scalable cloud environment.

## **REAL-TIME BUSINESS VISIBILITY**

Enabled real-time financial and operational insights across projects and contracts.

## **TRUSTED, AUTOMATED REPORTING**

Delivered seamless, error-free integration between ConnectWise PSA™ and Business Central.

“The migration from Dynamics GP to Dynamics 365 Business Central was a critical project for us, and Madhda proved to be the perfect partner. Their team demonstrated exceptional expertise in handling the complexities of the migration, ensuring minimal disruption to our day-to-day operations. From detailed planning to execution, Madhda managed data migration, customizations, and integrations flawlessly. Their proactive communication and quick problem-solving made the entire transition smooth and efficient. Today, we operate on a modern, scalable ERP platform that positions us strongly for future growth.”

**COO, IT MANAGED SERVICES COMPANY, USA**



# Get In Touch

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