



ERP FINANCE & OPERATIONS MIGRATION FOR MANUFACTURING

July 2025

Client Background:

A leading manufacturing company using IBM AS/400 needed to modernize its ERP to support growth, enable integration, and reduce manual operations. Ulises supported their transition to Microsoft Dynamics 365 Finance & Operations.





USE CASES:

TRANSITION FROM IBM AS/400 TO MICROSOFT DYNAMICS 365 ERP



RESULTS

40% reduction in manual production entry tasks

Automate production order planning

Real-time status tracking

Real-time stock tracking

Improved user interface with natural language capabilities



ULISES DRIVES GROWTH FOR MANUFACTURERS



Simplify Operations

We implemented Dynamics 365 Finance and Operations (F&O) to unify finance, production, and supply chain workflows, thereby removing inefficiencies and enhancing operational agility.



Gain Real-Time Visibility

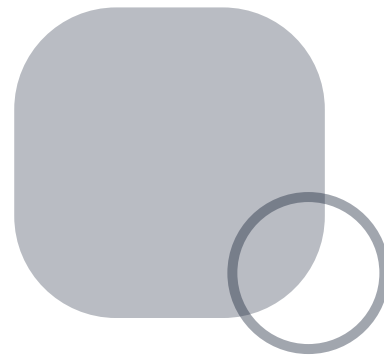
We achieved a live view of operations, identified bottlenecks early, and responded to market shifts with data-driven precision.



Drive Profitability

From better resource allocation to reduced delays, we turned operational efficiency into measurable financial outcomes.

AGILE BY DESIGN & MICROSOFT SUCCESS BY DESIGN



01

Agile by Design:

While fully iterative development isn't always suited for end-to-end commercial product implementations, we draw on agile practices that add real value—maintaining the right balance between defined requirements and development flexibility.

02

Success by Design (Microsoft):

At Ulises, we apply Microsoft's Success by Design methodology to ensure the successful implementation of our solutions. By incorporating Success by Design, we ensure that every phase of your project, from planning to go-live, follows industry best practices around security, scalability, performance, and user adoption. Our regular design reviews and guided checkpoints help identify and mitigate risks early, reducing rework and accelerating delivery.

REQUIREMENT GATHERING



Stakeholder

Engage with Stakeholders

Stakeholders management was a key success factor all along the project implementation, as stakeholders' workload peaks during this stage. We involved each key role at the right time for a specific topic, thus maximizing time efficiency and input quality.



Identify Key Requirements

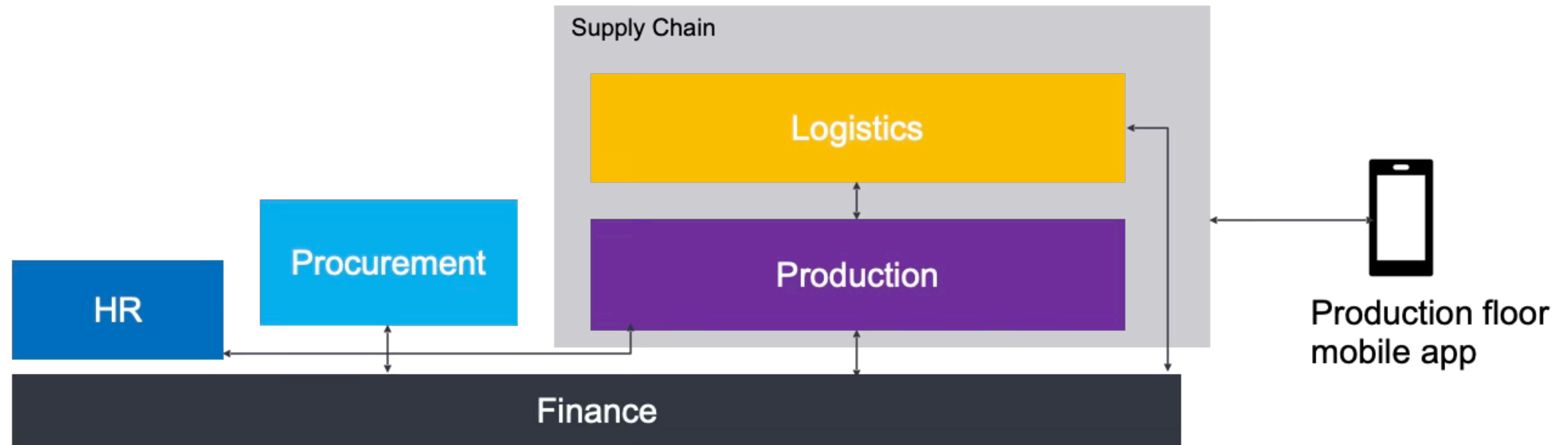
Through workshops and interviews, we extracted the critical needs that fueled operational efficiency. We clarified priorities and aligned expectations to ensure the new solution supports real goals.



Document Business Processes

We created a clear and thorough map of existing workflows. This allowed teams to spot gaps and redundancies, setting the stage for improvement and long-term process efficiency.

MODULES OVERVIEW-IMPLEMENTATION | ulises



Operational Excellence Across the Value Chain

We implemented and integrated key business modules to unlock efficiency at every level. From Finance (GL, AP/AR, Accounting) to Procurement (smart requisitions) and HR (employee and time management), each area now runs on streamlined, connected processes that reduce friction and drive clarity.

Smart Supply Chain & Production Enablement

Our Microsoft-based approach allowed us to implement advanced solutions in Logistics (warehouse planning, custom labeling, and costing) and Production through full integration of MS Dynamics F&O. Users now manage automated planning, orders, and stocks in real-time, boosting throughput and supply chain visibility.

SYNAPSE ANALYTICS AND POWER BI

Through seamless integration between Dynamics 365, Synapse Analytics, and Power BI, organizations gain real-time visibility into enterprise data, empowering strategic decisions through advanced analytics and intuitive visual insights.

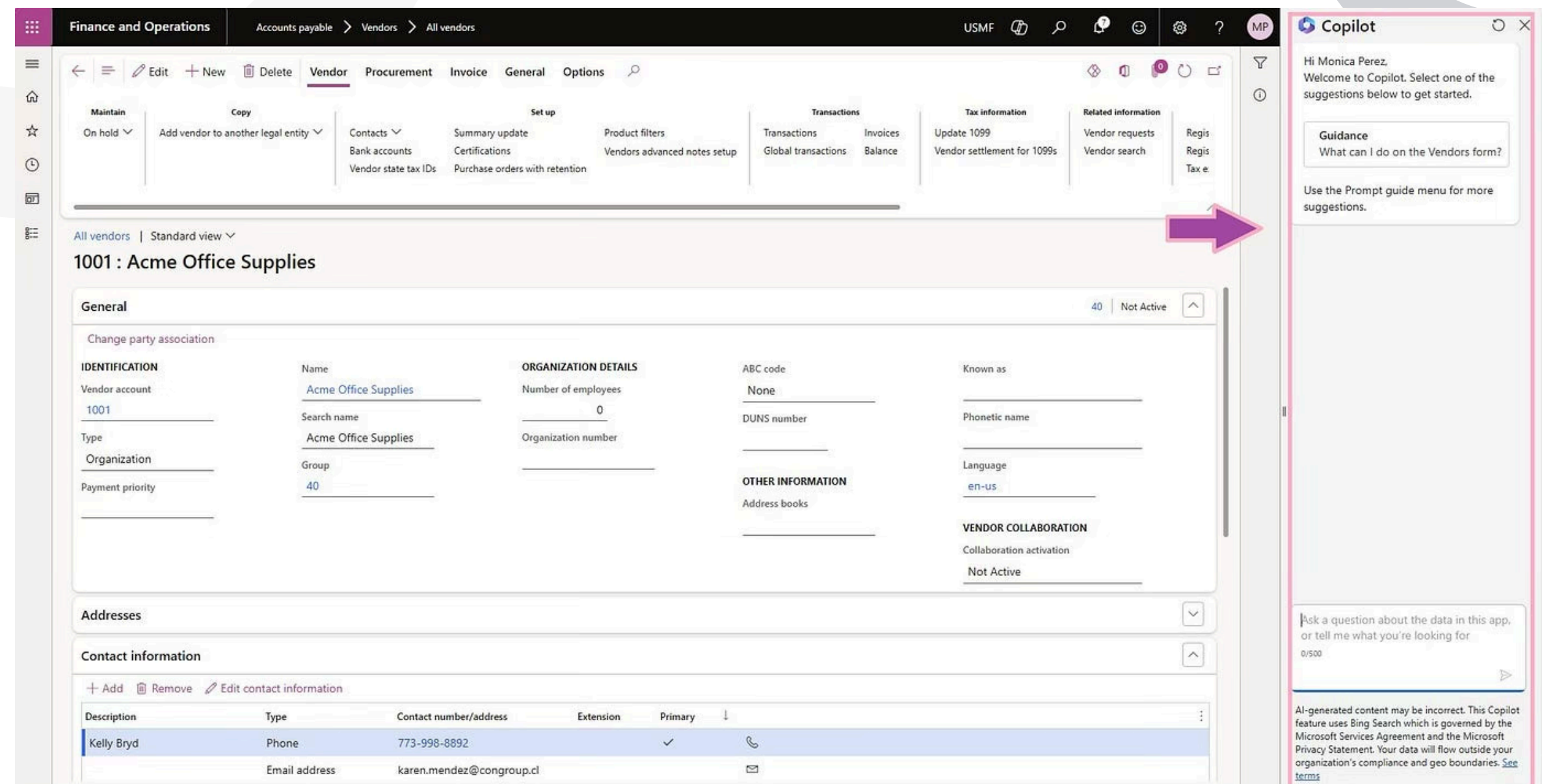


We chose to export raw data into Synapse Analytics to align with the customer's existing BI landscape, which included an in-house Data Lake and Data Warehouse. This approach ensured seamless integration with their established ETL processes and maximized the value of their current analytics investment.

COPILOT STUDIO AGENT



Copilot Studio seamlessly integrates with Dynamics 365 Finance, enabling users to retrieve real-time insights and execute operations using natural language. This integration streamlines workflows and enhances data-driven decision-making through AI.

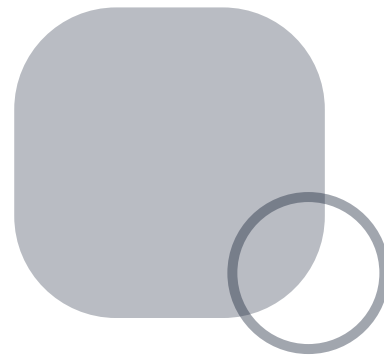


We implemented a tailored Model Context Protocol (MCP) for their logistics workflows, allowing the users to execute a variety of logistic operations, retrieve real-time data and predictions using natural language.

SECURITY: ACCESS AND USERS



We simplify user and role management within Microsoft Dynamics 365, ensuring secure, scalable access tailored to your business structure. Our approach enhances compliance, audit readiness, and operational efficiency in today's dynamic enterprise environment.



01 **Role management:**

We designed a tailored role-based security model aligned with the client's operations—ensuring compliance, minimizing risk, and enabling secure, efficient access across production, logistics, procurement, and finance.

02 **User management:**

We enabled centralized user management via Azure AD, streamlining access and authentication. Role-based grouping, approval workflows, and audit tracking ensured simplified administration and strong compliance across operations.

TRANSITIONING TO THE NEW SYSTEM



Final Preparations for Go-Live

We ensured all components were fully configured and performed as expected before launch, while securing a smooth transition through successful adoption by internal teams.



Training for End-Users

Tailored training sessions for users facilitate familiarity with new systems, ensuring they possess the skills required to leverage Dynamics 365 F&O capabilities effectively from day one.

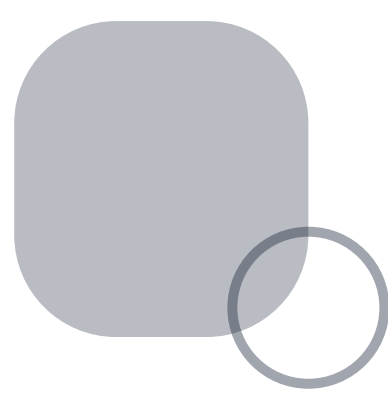


Support and Troubleshooting

Dedicated support teams stand ready to address any challenges encountered during the go-live phase, ensuring a smooth transition and user confidence in the new system.

CONCLUSION

KEY TAKEAWAYS AND FUTURE STEPS



01

Summary of Implementation Process:

A comprehensive review of the steps undertaken, from requirements gathering to go-live, highlighting the value added through critical gaps covered, key improvements implemented, and new capabilities being developed.

02

Next Steps for Continuous Improvement

Valuable insights gained throughout the implementation process guide future endeavors, reinforcing the significance of stakeholder involvement and agile adjustments as key to success.

03

Roadmap Definition:

Our goal goes beyond successful implementation; we aim to become your reliable partner in developing long-term technological capabilities. After go-live, we provide a complimentary assessment roadmap outlining the next steps to help you become a technology leader in your sector by leveraging the latest IT trends and capability enablers.



THANK YOU

FOR YOUR ATTENTION

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