

"Financial service providing company deploys Dynamics 365 Sales, Project Operations, and FSCM apps"

Overview

HQ- India

**Industry-
Financial Services**

Customer Profile:

TresVista Financial Services is a global enterprise established in 2006. It offers offshore financial services support for boutique buy-side and sell-side firms.



About the Client

TresVista Financial Services is a global enterprise established in 2006. It offers offshore financial services support for boutique buy-side and sell-side firms.

The financial support services by TresVista comprise investor relations, deal execution, deal sourcing, data analytics, valuation, research, portfolio management, financial modeling, marketing, design, book-keeping, and fund administration.

TresVista Financial Services works with over 1,000 clients across geographies, which include asset managers, corporates, advisors, and entrepreneurs. Over 1000 employees are working across offices in Mumbai, Pune, Bengaluru, New York, London, and Singapore, providing high-caliber support to several renowned companies.

Executive Summary

TresVista has been using multiple legacy home-grown applications for sales, project planning & execution, and accounting. Since the systems were disjoint, the employees needed to access different applications for data access and its operations, which was a persistent pain. Also, it required a dedicated technical team and maintenance.

TresVista was looking for a partner that could provide a standard Microsoft Dynamics 365 solution to undo their problems.

After evaluating several vendors for Microsoft Dynamics 365 competency, business size, and value proposition, they chose Alletec – a Microsoft Dynamics premium partner having a vast experience and proficiency in Microsoft Dynamics 365 applications implementation. Moreover, Alletec's engagement in Microsoft Dynamics product engineering also assured TresVista that it could effectively perform the desired implementations, customizations, and hotfixes.

Alletec provided a combined solution of Dynamics 365 Sales, Project Operations, and Finance & Supply Chain where the company received a centralized system to access, manage, and operate all their financial data. Also, offered many integrated applications to minimize their effort and time consumption.

The Situation

- TresVista had multiple disjoint systems for functions like sales, project operations, and accounting, which was time-consuming for the employees.
- The employees were dependent on manual methodologies for the compilation of financial results.



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Alletec Solution

- Alletec suggested implementing an integrated solution - Dynamics 365 Sales + Project Operations +Finance & Supply Chain.
- Cloud based solution was deployed to allow TresVista to focus on its business.
- The experienced and highly skilled developers utilized Power BI to develop a centralized dashboard.
- Native integration was enabled between various Dynamics 365 apps to carryout seamless data transfer.
- Integration was enabled with a third-party HR and payroll solution to synchronize employee records for managing project operations.

The Benefits

- Access to a single source of accurate and real-time data through a unified end-to-end business platform with easy to use dashboard.
- The system now provides efficiencies and 360-degree visibility to operations and financials.
- A firm technology foundation has been laid to enable TresVista build further capabilities in terms of automation, business intelligence, and more.
- A clean start to Microsoft Dynamics 365 FSCM enabled adopting the most advanced accounting and business features along with seamless future upgrades.
- The Finance department developed efficiency as most of their tasks are now automated. A much lower headcount is able to manage the operations.



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