

We Helped a Healthcare Technology Company Streamline **Finance** and **Field Service** **Operations** with Dynamics 365

About the Company

A leading healthcare technology provider specializing in medical imaging systems, equipment sales, and multi-vendor biomedical services. The organization delivers advanced medical imaging solutions and maintenance support to healthcare providers across South Florida.

Industry

Healthcare & Medical
Imaging

Workforce **200+**

Presence: United
States, Germany

Service



D365
Finance



D365 Field
Service



Power BI



SSIS & DMF
Data
Migration



Integration



HyperCare
Support

Solution

Finance Modernization

01

Migrated from multiple legacy systems to Microsoft Dynamics 365 Finance, automating financial operations, improving accuracy, and enabling real-time forecasting and reporting.

Field Service Optimization

02

Implemented D365 Field Service to automate work order creation, streamline technician scheduling, and enhance service delivery visibility.

Data Integration & Automation

03

Unified data from multiple SQL databases using SSIS and D365 DMF, ensuring seamless financial and service data synchronization across business functions.

Analytics & Reporting

04

Deployed Power BI dashboards for financial and service insights, enabling management to monitor KPIs, identify trends, and drive data-based decisions.

Seamless Deployment & Access

05

Implemented ClickOnce deployment for automatic Add-in updates and Entra ID-based secure access for global teams.

Transparency & Collaboration

06

Delivered a self-service platform that enhanced visibility for brokers and improved collaboration between finance, sales, and broker teams.

Results and Outcomes

- Faster service scheduling and work order creation, improving response times and service delivery.
- Enhanced financial forecasting accuracy through automation and real-time visibility.
- 40% reduction in manual errors by replacing legacy reconciliation and scheduling processes.
- Accelerated decision-making via interactive Power BI dashboards and unified reporting.
- Improved compliance and audit readiness with automated workflows and standardized data processes.
- Higher customer satisfaction and team productivity driven by optimized field service operations and cross-departmental collaboration.