

# Improved Operational Efficiency With Unified Data Ecosystem

## Problem

A mid-sized financial services firm struggled with manual reporting processes, leading to delayed decision-making and inconsistent data across departments. Audit preparation required extensive manual effort, and the firm frequently encountered compliance challenges due to outdated processes.

## Solution

Xylity teams of experts transformed the client's financial operations with Dynamics 365 Business Central, focusing on

- **Automated Financial Reporting**  
Created dashboards with real-time updates, eliminating the need for manual consolidation of data.
- **Integrated Compliance Tools**  
Introduced built-in regulatory checks and audit trails to ensure adherence to standards.
- **Unified Data Management**  
Connected disparate data sources into a single platform for comprehensive financial oversight.

## Workflow

- **Data Integration**

Unified financial data from ERP, CRM, and other systems into a central repository.

- **Real-Time Updates**

Automated transaction entries updated dashboards instantly.

- **Compliance Automation**

Regulatory checks flagged issues early, with detailed audit trails simplifying audits.

- **Customizable Reports**

Stakeholders received tailored financial insights via Power BI dashboards.

## Achievements

- Reporting accuracy improved by 30%, reducing discrepancies.

- Audit preparation time decreased by 25%, saving significant personnel hours.

- Compliance risks minimized with automated checks and comprehensive trails.

- Decision-making accelerated with instant access to up-to-date financial metrics.