

TRANSFORMATION STORY

Nonprofit Elevates Operations With Managed Services for D365 Business Central

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Struggling with the conversion from QuickBooks, Education Analytics (EA) needed help getting off the ground with BC. Armanino finished the conversion and set EA up for success.

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Kiki Moritsugu
Accountant II, EA

The Client

Education Analytics is a mission-driven nonprofit that uses data and analytics to improve outcomes and drive change for students and the broader education system.

The Problem

The nonprofit spent more than a year wrestling with a clunky D365 BC implementation. A lack of customization and hands-on support left them unable to use the system effectively.

The Solve

Armanino's Application Managed Services team assisted with the BC environment, providing strategic guidance, software training, troubleshooting and customizations tailored to nonprofit needs.

The Outcome

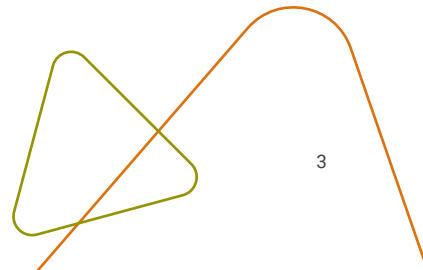
With Armanino's software support, EA harnessed D365 BC's full potential to eliminate manual workarounds and improve financial processes.

D365 BC Implementation *Falls Short*

Founded in 2012, Education Analytics (EA) is a [nonprofit](#) that specializes in analyzing data, creating metrics and illuminating patterns that help educators make informed decisions and improve student outcomes. But behind the scenes, the organization's own finance operations were stuck in spreadsheets, workarounds and manual tasks.

In 2019, EA decided to implement [Dynamics 365 Business Central \(D365 BC\)](#) to modernize their finance function. A bumpy implementation, exacerbated by lackluster guidance and support, left the nonprofit frustrated with a system that wasn't working the way they wanted.

"We couldn't use the software in any meaningful way, and we weren't getting the help we needed to figure it out," explains Eric Cramer, Director of Finance at EA.



Switch in Software Support *Changes 'Everything'*

“The Solver implementation was smooth and straightforward. With one integration to Business Central and a few out-of-the-box reports, we were up and running.”

Eric Cramer
Director of Finance, EA

EA's goal was simple: Get D365 BC running smoothly to make their day-to-day work easier. “We needed something to rely on rather than bang our heads against,” says EA Accountant II Kiki Moritsugu.

While looking for a new D365 BC value-added reseller (VAR) partner, EA was also considering [Workday Adaptive Planning](#) for financial reporting. “That conversation brought Armanino into our orbit,” says Cramer. After a positive experience with Armanino on their Adaptive implementation, the EA team knew they'd found their VAR solution. They decided to have Armanino take over managed services for D365 BC.

“We knew we had to get better software support,” says Moritsugu. “When we found Armanino, it changed everything.”

D365 BC Customizations

Eliminate Clunky Processes

Once Armanino stepped in, EA was able to advance their D365 BC setup beyond basic solutions to a system built specifically for their nonprofit requirements.

One of the biggest challenges was that EA's finance and procurement process didn't fit a traditional inventory-based system. They needed a purchase order process specific to nonprofit funding — one that tracked contracts rather than inventory. Armanino reworked the D365 BC setup to match how EA operated, simplifying their contract tracking process.

Another major issue was invoicing. EA's detailed invoices regularly hit character limits within D365 BC, forcing manual workarounds that slowed down the accounting team. Armanino eliminated those frustrations by customizing the system to accommodate EA's billing requirements.

"Armanino showed us ways to use Business Central that we didn't even know about," says Moritsugu. "There were also integrations with other software that Armanino was extremely instrumental in helping us discover and use." This included integrations with their expense software, Emburse Enterprise, as well as Expensify for credit cards connected to Chase Bank.

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With an ERP that now fit their operations, EA’s finance team could track and manage contracts more effectively, generate invoices without system workarounds and simplify financial reporting. As part of Armanino’s support, the EA team could also access ongoing [software training](#) to keep sharpening their skills.

“It was such a relief when Armanino took over managed services,” Moritsugu says. “Our former provider’s support process was very much like a checklist: fill out the Smartsheet, check off boxes, call us when you’re done. To have someone taking the time to have real conversations with us about our needs, answer our questions and help us through the specific software customizations was a welcome change.”

Easy Solver Integration

Enhances Planning, Reporting

Over time, EA realized they didn't need Workday Adaptive Planning's full capabilities. They decided to pivot to [Solver](#), a system that better aligned with their financial statement preparation and ad hoc reporting needs — and integrated easily with D365 BC. They chose Armanino for the implementation and added Solver to their managed services support, as well.

"The Solver implementation was smooth and straightforward," says Cramer. "With one integration to Business Central and a few out-of-the-box reports, we were up and running." This seamless transition allowed EA to refine their financial planning and reporting without making processes more complicated for the accounting staff.

Rock-Solid Support Smooths Path for Wider Improvement

Looking ahead, EA is focused on the bigger picture. “We want to step back and reevaluate all our tools to ensure they serve us effectively,” Cramer adds. “This includes not only reviewing our financial systems but also considering other core systems like [human capital management](#), [customer relationship management](#), and project management tools. We’re in the early stages of these changes, and we’re excited about potential improvements.”

EA knows they can count on Armanino for future guidance, and they credit the Managed Services team for accelerating the progress they’ve made so far. “Our software support from Armanino has been terrific,” Moritsugu says. “They really helped make all of this possible for us — and made it easy and smooth.”

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