

CASE STUDY

SBCERA migrates to Business Central without disrupting AP operations

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5

months to migrate to Microsoft Business Central



1

short phone call to switch Stampli to the new ERP

About

With \$14B in assets, the San Bernardino County Employees’ Retirement Association (SBCERA) provides retirement, disability, and death benefits on behalf of approximately 45,000 members and beneficiaries. The stability of their financial system is critical – which makes an ERP migration such a challenging project to undertake.

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Jayson Eaton, Accounting Manager, SBCERA

Challenge:

Migrating between ERPs without disturbing business as usual

ERP migration is one of the most challenging projects a finance team can undertake. It's complex, it's time-consuming, and there are inevitably unexpected challenges along the way.

At SBCERA, the problems of migration were weighing on Accounting Manager, Jayson Eaton. The organization's old ERP, once a reliable backbone of financial operations, had become a bottleneck. This was especially true in terms of ease of training new users as well as getting analytics to make better decisions. It fell to Jayson to lead the shift to Microsoft Dynamics 365 Business Central.

As complicated as the migration project was (it would span 4-5 months and take up nearly a quarter of Jayson's available time each week), Jayson worried that it was even more complex due to their use of Stampli as a third-party accounts payable automation solution.

What Jayson really wanted was to swap out the ERP without impacting the AP process. After all, everyone liked using Stampli — not just in finance, but everyone who had to touch the system in order to approve invoices, answer questions, provide input or otherwise participate in the process. But how can you migrate an ERP without disrupting the third-party systems that sit on top of it?

Solution:

A seamless transition to migrate master lists such as vendors, GLs, entities and everything else

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Stampli has indeed turned ERP migration into a science. When a customer decides to migrate from one ERP to a new one, the process is carefully orchestrated to ensure a smooth transition — including migrating vendor data, matching new data sets, and maintaining business continuity.

Prep work begins a few weeks prior to cutover, when Stampli's Customer Success team works with customers to understand the details of their environment, including the presence of any customizations or special export triggers, and to review the new ERP configuration considerations.

Following this, the customer prepares their account by processing all of the invoices and payments currently in Stampli. (This process avoids potential errors or duplicate entries after cutover.) Stampli's team then updates the settings and runs a script to download the relevant data from the new ERP — ensuring that the new ERP is the source of truth from that moment forward.

Perhaps most importantly, Stampli also works with the customer to map key values for vendors, GLs and other fields from the old ERP to the new one. Historical invoices processed through Stampli under the previous ERP are still accessible and not lost during the conversion process. This includes all activity, audit trails, conversations, documents, and other objects. The conversion maintains continuity for both the AP workflow and access to historical invoices.

In addition to the well-planned process, Jayson was even more impressed by the level of expertise of Stamppli's staff. "I didn't know how familiar Stamppli would be with SBCERA or with Business Central, but Jason and Jeremy at Stamppli were really familiar with our existing process, and they knew everything there was to know about Business Central."

For added risk reduction, Stamppli gave Jayson access to a sandbox environment.



"I was able to play around in an environment connected to our new ERP, try different invoices, and work out the kinks. It made things totally seamless."

Preserving tribal knowledge

As an organization grows, sometimes tribal knowledge becomes a risk. This is especially risky for migration projects, because the things only one person knows may not be communicated to the project team. This risk is lessened with Stamppli. "It's so intuitive that you can easily train new people, and they don't have to remember weird quirks," said Jayson. "But what's really helpful is that you can see what was done in the past — how things were coded, who the approvers were — so that new people and new systems are easy to get up to speed."

Bottom Line

Migration eased by our "ERP truth" philosophy

Users that have experience with Stamppli competitors sometimes wonder why Stamppli doesn't let you create new vendors or GL accounts. The answer is simple: A business needs the ERP to be the source of truth in order to ensure data accuracy and consistency across the organization. A byproduct of this approach is that it makes ERP migration much easier, because Stamppli simply switches from one source of truth to another — always staying in sync with the core ERP.