

Case story

How Companial partnership helped accelerate cloud transition for a world-leading ISV

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TrustQuay is a global Microsoft ISV partner operating in the trust, fund and corporate services market. Using their 20+ years of specialist knowledge in this market to create tailored products, TrustQuay leverages the strength of the Microsoft business platform.

NavOne, one of the leading TrustQuay products, is a unique trust, fund, and corporate services system, powered by Microsoft Dynamics 365 Business Central. TrustQuay NavOne is an enterprise-wide system used by small to large organizations operating across sectors in over 30 jurisdictions.

Challenge

Whilst keeping pace with the Microsoft Dynamics 365 Business Central technological changes, TrustQuay has had to balance the existing NavOne client commitments with dedicating resources to move their solution forward to the latest version of Business Central Extensions. *"Being a large vertical ISV solution, the need to move to the Extension module was a new challenge for us. One we understood well, but where we needed a great partner like Companial to assist us in accelerating that process,"* explained Adrian Akers, Global Head of Strategy and Innovation at TrustQuay.

TrustQuay already had a good relationship with the Companial UK team, whose knowledge and assistance were key deciding factors in selecting them to help with this particular task. *"We recognised that we wanted to work with Companial because they also have the expertise in doing this for many Microsoft Partners and ISVs. It was important to us for Companial to be close to our teams. This would ensure that any issues and resolutions could be worked through together, especially where technical challenges had been solved previously by Companial,"* said Simon Witkiss, Global Head of Product & Marketing at TrustQuay.

Major Steps in the Add-on to Extension Transformation Process

To begin with, TrustQuay used Companial's Upgrade Analyzer to assess the NavOne transformation scope and price. Companial's [Upgrade Analyzer](#) is a free-of-charge online service that provides technical upgrade options at a fixed price and helps choose the best upgrade path for the solution.

"It was a useful tool to help us break down the tasks that we needed to undertake and to pull them together into various groups. It allowed us to easily discuss the challenges together as a group and gave us a clear starting point and measurable deliverables", Akers shared.

With the full competency of the Microsoft ISV Development Center, Companial and TrustQuay worked in partnership together undertaking the TrustQuay's NavOne transformation project needs:

- Upgrading from Business Central version 14 to 17 and conversion to the Modern Browser client.
- Scoping workshop based on Companial's Upgrade Analyzer assessment to identify transition feasibility and major risks.
- Redesign for Dynamics 365 Business Central Online compatibility. Requesting Standard Event Publishers from Microsoft, resolving Business Central Online limitations, and upgrading from Business Central version 17 to 19.
- The delivery of one source code that supports both the on-premises and online solution versions.
- Power Platform workshops to explore future use cases alongside NavOne.

In this NavOne transformation project, the Companial and TrustQuay teams had a very integrated working relationship. Companial expertise augmented TrustQuay expertise, enabling smooth project flow. The TrustQuay team's technical competency, quick reaction time, and immediate decision-making accelerated the process leading to overall success.

"It was not a standard project where we could take everything into our sole hands. It was a joint-partnership where we worked as a partner within the TrustQuay team, providing our know-how and support where it was needed", says Arunas Lapenas, Business Central Team Lead at Companial.

Results

The main benefits to TrustQuay by using Companial's service were greater speed and reduced time to market for their NavOne solution. The delivery of the final update was made ahead of schedule, hugely de-risking the project and allowing TrustQuay to stay on time with the roll-out.

"Companial were extremely professional, all the way through from initial planning, refinement, and on to the execution of the work. It was price competitive and delivered on time. There was constant communication between us throughout the process, and the project management was top class", Akers explained.

"The final solution was well delivered and met our expectations. Companial did a lot of the heavy lifting for us, allowing us to concentrate on some of the more complex refactoring exercises. We would have no hesitation in using or recommending Companial services again in the future," says Adrian Akers.

High-Quality Microsoft Dynamics 365 Business Central Upgrades with Companial

Companial has over 13 years of expertise in helping Microsoft Dynamics Partners successfully upgrade any Dynamics NAV/365 Business Central solution, no matter how complex. This experience allows us to solve any challenges that crop up on time and risk-free, while still providing upgrades at a lower cost. Using automation tools to optimize performance (such as the [Upgrade Analyzer](#) and C/AL to Extension Analyzer), Companial saves 70% of the time that's typically utilized during the upgrade process. We provide a free upgrade project assessment, a fixed price proposal, and a free upgrade project warranty for up to 3 months, helping Microsoft Dynamics Partners to deliver the best possible service to their customers.

Request an upgrade service today for a FREE upgrade analysis or contact us at service@companial.com if you have any questions.