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CASE STUDY

SEMINOLE FINANCIAL SERVICES

The Pockets Behind Green Energy - Seminole Financial Services gets Recharged with Business Central

The Software

After enlisting our help in analyzing all their options, together we found that Microsoft Dynamics 365 Business Central was the right fit for Seminole. They were looking for:

- The same capabilities for financial management as before
- Enhanced financial reporting capabilities
- The ability to shift between over 20 different entities seamlessly
- Little-to-no learning curve
- User-friendliness

In Business Central, they got all that and more. In fact, Business Central (despite the affordable price tag) may even be a little too robust. Their team now is enjoying learning all the new features that weren't available to them in Dynamics NAV.



Overview

Seminole Financial Services (SFS) is a pension/ investment fund management firm based in Belleair Bluffs, Florida. While the name has only been around since 2009, the company itself has been operating (with most of the same investors) for over 30 years. SFS has a range of different funds, but what they're most known for are their renewable energy funds – providing debt and equity financing to developers of solar and wind farms.

As a small niche firm with a small team, their needs weren't too complex. They had purchased Microsoft Dynamics Navision (NAV) back in 2009, and that was that. Dynamics NAV 2009 did everything they needed, even without regularly upgrading; they were hesitant to change since everything was running so smoothly. But since Dynamics NAV is trending toward the superannuated side, SFS decided to play the field a bit and found a perfect match in Microsoft Dynamics 365 Business Central.

Fun Fact

Seminole has directly funded over \$1.9 billion in renewable energy projects, totaling more than 1 Gigawatt (which is ONE BILLION watts!) Nationwide. That's almost enough to [power the DeLorean!](#)





“Moving to Business Central has saved 25% of my time,” Kris D. of Seminole Financial Services reports. “We don’t use all the bells and whistles, but what we do use works great for us.”

The Implementation

We have found that in ERP implementations, it is of paramount importance to ensure that the team is well-prepared to use the system far before go-live. In this case, it was a breeze. A single team member from Seminole worked with a single member from our team (our longest-tenured project manager Juliet Constantino).

SFS has decades of experience with Dynamics products, so it was easy for them to pick up the basics of using Business Central. The implementation went smoothly – on-time and on-budget. The SFS team reported that they had very few questions, and when they did, our support staff answered quickly and thoroughly.



“Seminole had over 20 companies and during the implementation, we were able to create the first few for them, and then they were able to copy the other companies - so that helped a lot. We also used the consolidation feature in Business Central to consolidate the companies for elimination entries and financial statements.”

A favorite feature? “They really liked the copy feature with purchase invoices so they could ‘re-use’ invoices without re-entering over and over. It saves so much time!”

The Solution

Many of our success stories are filled with drama – but they don’t need to be dramatic to be compelling. Seminole Financial Services is in the business of funding the future for so many other people, but in this project, they invested in themselves. Crestwood Associates is very proud to have worked with Seminole for decades, and that we were able to provide the perfect solution for them moving forward for decades to come.

About Crestwood

Crestwood Associates is more than ERP. We bring current technologies - such as modern ERP systems like Acumatica and Microsoft Dynamics, along with cloud and business services - all while “Doing the Right Thing” by our clients. Living by this motto helps us to lead the way to change the widespread failure of ERP implementations over the past 30 years. With our modern methodology, over 20 years of experience, and expert, certified staff of business consultants, we see this as a chance to pave the way to aspire to achieve a 100% client success rate. How? Crestwood is committed to being beholden to our clients, not the software vendors and, in a larger sense, we want the people who work with us to enjoy technology and enable them to enhance their own lives.