



How a Hands-On Roadmap Approach Delivered a QuickBooks to Business Central Migration in 60 Days

Customer:

Trilogy LLC

Industry:

Oil & Gas Services

Organization Size:

200 employees

Headquarters:

North Dakota / Texas

Highlights:

- A flexible approach to the request for a self-guided implementation met customer needs and reduced costs.
- Live on Business Central in just 60 days.
- Substantial performance gains in financial closes and reporting.

About Trilogy

Since its start in 2016, Trilogy has provided support services to oil and gas operators. Including sand management, facility management, drill-out support, fragment support, flowback, and well testing.

The Challenge

Trilogy used QuickBooks successfully for many years. However, as they grew, they started to face several challenges.

Remote Access. With teams working in multiple locations, it was necessary to move to a cloud-based platform so that all stakeholders could have access to operations and financials anytime, anywhere, and streamline the approvals process.

Financial Reporting and Data Exchange. QuickBooks has a very rigid reporting engine. More complex financial analysis required exporting and importing data which was tedious and time-consuming, especially for complex workflows.

Fixed Assets. QuickBooks does not have the robust Fixed Asset tracking that Trilogy needed to properly handle its vast fleet of equipment.

Jacquelynn Nehilla, Controller at Trilogy, was hired in April 2024 and tasked with finding a solution that would alleviate these pain points.

As a CPA with experience using Microsoft Dynamics 365 Business Central, Jacquelynn knew it would be the right solution for Trilogy. She also felt confident that she and her team could do much of the implementation work themselves, with some guidance.

However, the Microsoft Dynamics partners she evaluated were uncomfortable with this approach, wanting to follow a standard plan. At this point, Jacquelynn felt Trilogy was being “placed in a box”, meaning the partners weren’t willing to be flexible in their process or pricing to meet Trilogy’s needs.

The Solution

A member of the Business Central community recommended that Jacquelynn contact Kristen Hosman at Mount Evans Consulting and she explains the experience.

Why did MEC prove to be the right choice? *“After a brief meeting with Kristen, I knew MEC was the way to go. She understood our needs and trusted I could do much of the work if I just had a roadmap. Kristen would give me a list of tasks to be accomplished. I could simply proceed with the work, or if needed, she was happy to meet with me to explain the details. She would review my work, and then we would advance to the next stage. I felt like a Business Central intern being trained by a professional.”*

How did it compare to the option of working with a large partner? *“Working with MEC meant I wasn’t passed around to new people all the time. From the initial consult to go-live and beyond, I worked with a core group at Mount*

“I recommend Mount Evans Consulting because they tailor the implementation to your needs and your budget. They really care that you want to understand how the system works, so they explain things clearly and make recommendations based on your level of experience and what is in your best interests. MEC is a true business partner. They’re not going to try to put you in a box.”

**Jacquelynn Nehilla, Controller
Trilogy, LLC**

Evans who were all in the know about my project. I felt well supported.”

What about the more complex issues? *“Kristen was really helpful when we were integrating our industry-specific operations system. She would jump on the phone with the developer to help them sort out problems using Business Central’s API. She really went the extra mile.”*

How would the finance team get up to speed with Business Central? *“Kristen supported us with virtual training, such as a session on accounts payable that helped our accounting admin to get up to speed. We also derived a lot of benefits from Kristen’s blog with tutorials and tips for everyday processes such as customer payments, bank reconciliations, etc.”*

What happened after the initial project was over? *“After go-live, whenever I asked for help, I’d get an answer within the day, which I thought was really impressive. And that answer came from the same people I’d been working with, not from some strangers at a support desk.”*



Benefits of Moving to Business Central

Moving from QuickBooks to Business Central was a huge leap forward for Trilogy. What productivity gains did they experience?

Anytime, Anywhere Approvals. Since managers are spread out nationwide, getting expense approvals with a manual, paper-based process was a real challenge. Jacquelynn explains, *"If my CEO wasn't in the office, it would be difficult to get approvals. Now, we have a virtual approval process, with all the documents right there so he can quickly see where the money is going."*

And they're taking it a step further. *"Phase two is to add more approval processes for others like the operations manager, so they can see the numbers and get a better picture. All of this just wasn't possible in QuickBooks."*

Faster Financial Reporting. Getting accurate data for deeper analysis is crucial for Trilogy's finance team. QuickBooks slowed their process down. *"Pulling the financial data out of QuickBooks and formatting it the way we needed it took half a day every month. Now, in Business Central, all the statements are customized just the way I want them to be. I can even make specific financials for different region managers. All the information is available at the click of a button."*

"As a product, QuickBooks is not as forward-thinking as Business Central. If you're a smaller company that doesn't want a huge ERP system, Business Central is a great choice. It can grow with you when you're ready."

Jacquelynn Nehilla, Controller
Trilogy, LLC

Smooth Data Exchange. Trilogy uses an industry-specific ticketing system to manage its operations, and Business Central can tap into that data. Jacquelynn explains, *"Because of the open architecture of Business Central, we were able to integrate our other systems easily, allowing key transactional data to flow back and forth automatically. As a result, we can now relate that data to credit card expenses and report on it, which we couldn't do before. That really makes my life easier."*

They uncovered other time savings as well. *"We save several hours a week on ACH transfers. Before, I would have to review approvals, and then our accountant would key them in manually on the bank's website. Now I can find invoices easily in Business Central, identify recurring expenses, quickly get approvals, and our accountant can simply export a file from Business Central and upload the transactions to the bank."*

Fixed Asset Tracking. Thanks to the more robust features of Business Central, Trilogy will be able to manage its fleet more easily.

Future Growth Plan. *"I'm very excited about Microsoft's new AI features. As a product, QuickBooks is not as forward-thinking as Business Central. If you're a smaller company that doesn't want a huge ERP system, Business Central is a great choice. It can grow with you when you're ready."*

The Cost to Move from QuickBooks to Business Central

Ultimately, the team at Mount Evans Consulting guided Trilogy to a successful Business Central implementation, ahead of schedule and under budget.

How does Jacquelynn feel about her experience?

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