

MYOB Exo

Client Community Solutions | Partner Momentum Software Solutions
Location Australia | Product MYOB Exo Business | Industry Not for Profit



This NFP is now transparent and ready for growth

Community Solutions is a not for profit (NFP) community service organisation that brings together the resources of communities, businesses, government and individuals to target issues of concern and opportunity in regional communities. Founded in 1999, today it has more than 250 staff, over 100 volunteers across 18 service sites in regional Queensland, but this growth had put tremendous pressure on internal systems.



Problem

Crumbling under the weight of data

When they first started out, Community Solutions were using MYOB Premier. "It was a good system", says Beth Miller, Group Accountant at the organisation. "Internally, we liked its simplicity – and externally most people were familiar with it. Our accountants and auditors all knew their way around. Some of our staff had also used it before", she adds.

Then Community Solutions merged with another NFP. "Almost overnight, the volume of our data doubled", says Miller, "and Premier just couldn't cope". Performing tasks became frustrating, and Community Solutions didn't really have the range of reports they wanted, to keep a watchful eye on what was going on beneath the surface.

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Solution

Preparing for future growth

The organisation spent about three months looking at possible replacements before considering MYOB Exo. "Exo seemed to have what we were looking for", says Miller - "flexible reporting, an SQL database and local support".

Exo also gave Community Solutions the ability to integrate payroll and accounting, something that was important given their large, decentralised workforce. Miller adds, "It was priced right too. "Quickbooks might have been a little cheaper, but it wasn't really suited to our organisation. It wasn't compatible with our existing IT platform and didn't seem to cater very well for future growth." Exo, on the other hand, did.

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Finding a provider you can trust

IT provider Camelon referred Community Solutions to Momentum – one of MYOB Exo's implementation partners in Queensland. "Local support was important to us," says Miller, "as was a good relationship with our provider". And according to Alistair Emery from Momentum, that's exactly what they had. "We built a really good rapport very early on," he says".

Configuring MYOB Exo

At the start of the process, Community Solutions gave Momentum a simple document listing their requirements. At the top of the list was flexible reporting. They also had a number of specific customisation requests, chief amongst which was the ability to budget and track revenue and expenses on four levels: organisation, business unit, program and site. In its general ledger, standard MYOB Exo only has three (branch, account and sub-account).

So that Community Solutions could get profit and loss and budget comparison reports at each level, Momentum treated programs as branches and linked branches together via a common report code to create a business unit. Each site could then be a sub-account in the applicable profit and loss accounts. "This configuration allowed us to utilise as many standard reporting and budgeting features as possible," says Emery "and support the posting of payroll information into this chart structure".

The learning curve

According to Miller, Momentum were extremely helpful. "They helped train us in the run up to the launch and made sure they were on site for our first week after go-live." Training was done using classroom-style training on laptops with genuine data – to make the whole experience more meaningful. In the early days there was some resistance, admits Miller. "That said," she says, "there's always a learning curve with new software. Emery thinks Community Solutions adapted to Exo very quickly"

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Outcome

A tailored solution

Several months down the line, the improvements are obvious, says Miller. "Thanks to Exo's SQL database, we can write customised reports that focus on areas that are specific to our particular business strategy and nobody else's. "We run reports by site and/or by program – depending on which manager needs them – and we can drill down into income or cost items easily too. "Perhaps most importantly though," Miller adds, "our audit trail is now impeccable".

Not for Profit organisations are accountable for the funds they get allocated by the government. Through Exo's reports, Community Solutions can be much more transparent about their transactions and the use of those funds. According to Emery, it's for this reason more than anything that Exo stands out in this sector. "This sort of budgeting and reporting is too complex for most accounting systems – but not Exo."

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Before	After
+ Increase volumes of data overnight occurred due to a merger and the existing system could not keep up	+ Flexible, customisable reporting that focuses on specific business areas
+ A lack of transparency on transactions and how funds were being used	+ An integrated payroll and accounting solution (important for this large decentralised workforce)
+ Limited range of reports resulted in limited visibility on what was going on beneath the surface	+ Can easily drill down into income or cost items
+ Existing solution could not be customised to specific requirements.	+ Audit trail is now impeccable and can budget on four levels.