

Customer success story:

# Working with Agilyx Group, Catholic Mission embraces Unit4 Business World to assist in transforming their finance systems

#### Client name

Catholic Missions

#### Industry

Non-profit Organization  
Management

#### Company Size

149

#### Headquarters

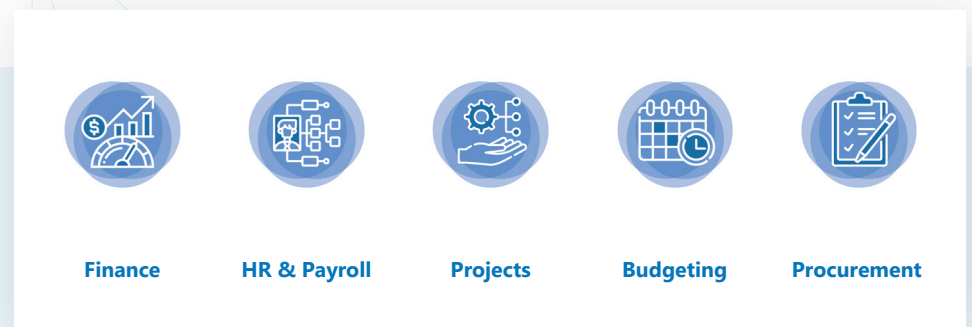
Sydney AU

## The Challenge

Catholic Mission wanted to ensure that donors were able to have confidence in their finances and guarantee donations were being well spent. The biggest challenge for the organisation was working with a combination of systems and numerous spreadsheets that weren't integrated. The previous financial systems simply hadn't kept pace with the growth of the organisation nor the complexity of activities, meaning they weren't getting adequate reporting and weren't able to see where they were on a month-end basis. It was unsatisfactory to wait until a full year-end set of accounts was completed to get an idea of how the year had gone.

## The Solution

In a search for a financial service, Catholic Mission identified Unit4 as their best fit on a number of levels. Firstly, the ability to record electronic copies of all documents on the transactions ensured employees did not have to go filing and hunting for documents when an audit was being completed, making the overall auditing process a great deal easier. Employees were able to efficiently see whether there was adequate documentation



for the transaction that was being recorded.

Secondly, being able to prepare financials in the more complex structure offered by Unit4 allowed Catholic Mission to have multiple legal entities in one database, simplifying the process with legal requirements around tax deductibility for donors and different legal enterprises. Furthermore, different legal entities were able to be adequately split, something which had not been possible in the old system.

# The Results

## Key takeaways from the project



**Easier audit process due to ability to record electronic copies of all documents**



**Assurance to donors that funds are being well spent due to increased transparency**



**Ability to have multiple legal entities in one database, simplifying tax deductibility**

## Final summary

Catholic Mission has experienced a number of significant benefits since engaging with Agilyx and Unit4. They've seen a significant uptake of digital modules, which has led to improved administration of expenses. It has also ensured users were well informed of the benefits that would be eventually achieved by themselves once the system was being utilised to its full potential. The simple and easy systems offered by Unit4 were successfully adopted by Catholic Mission staff as the digital solutions were integrated into their everyday tasks. Since implementing UBW and having fully auditable accounts where all transactions are monitored and controlled, Catholic Mission has been able to give donors confidence that their money is not being wasted and can prove to them that their money is going where it should go.

Catholic Mission have already experienced improvements and foresee further improvements as they continue to familiarise users with the system and how it works.

***“We’ve got a long way to go and I’m hoping we’re still doing this in five years because I can see there are a lot of things we could do in the way of improving our processes; the system has way more scope than we need. We’ll be leveraging the benefits of this over time and for a long time.”***

*- Andrew Hurt, Corporate Services Director, Catholic Mission*

## About Agilyx

Agilyx delivers unmatched business transformation solutions through the implementation of our leading-edge ERP, PSA, and HCM products and world-class services. Whether we're implementing your business solution or providing a full system analysis, we're driven to deliver valuable, long-term solutions matched with a world-class customer services team – helping people transform the way they do business.

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