

Customer success story:

Catholic Mission embraces Unit4 ERP to assist in transforming their finance systems

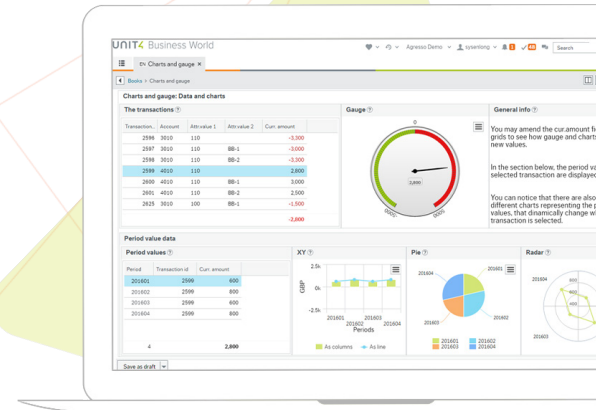
The Challenge

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.



Customer name
Catholic Mission

Industry
Non-Profit Organisation
Management

Company Size
149+

Headquarters
Sydney, Australia



Finance



Projects



Budgeting



Procurement



HR & Payroll



The Results

"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 processes; the system has way more scope than we need. We'll be leveraging benefits of this over time and for a long time."

- Andrew Hurt, Corporate Services Director, Catholic Mission

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Key takeaways from the project



Easier audit process due to ability to record electronic copies of all document



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



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

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 Unit4 ERP 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.