



Nonprofit Healthcare Facility Unlocks Financial Data with Microsoft Dynamics GP Reporting



With our old ERP system, it was very frustrating to know that the data was in there, but we couldn't get to it. Now getting financial information is so easy.

Ruth Donahue, Controller, Church Homes, Inc.



Customer:
Church Homes, Inc.

Web Site:
www.churchhomes.org

Location:
Hartford, Connecticut

Industry:
Non-Profit Healthcare Services

Former System:
Proprietary AS400 System

Customer Profile:
Church Homes, Inc. is a nonprofit, nonsectarian corporation committed to providing the finest in residential living and healthcare services for older adults.

Highlights:

- Data no longer locked in the financial system.
- Reports are always available and up to date.
- Payroll processing time cut in half.
- Automated filing and GL entry imports save time.

CAL Business Solutions Inc.
860.485.0910
sales@calszone.com
www.calszone.com

The Challenge:

Church Homes, Inc. is a retirement village with two locations in Connecticut. Each campus has a nursing home, cottages and various levels of care for its residents.

Prior to 2014, Church Homes was using a homegrown software system run on an AS400 server. While it got the job done in terms of processing transactions and the staff was comfortable with it, it was cumbersome to use, and the information was locked in the system and difficult to access.

Eventually the AS400 server needed to be replaced, and the future of the company that owned the proprietary software was uncertain. Church Homes feared it would be left without support, and realized it was time to move to a new accounting system.

The Solution:

A decision-maker at Church Homes spoke with a colleague at another local retirement community that was using Microsoft Dynamics GP. When the Church Homes team went to their site and saw the system, they knew it would work for them too. Church Homes felt it was important to work with a local Microsoft Dynamics GP partner to provide support and training onsite, so they selected CAL Business Solutions.

Ruth Donahue, Controller at Church Homes, talks about the benefits of their decision:

The Benefits:

"I don't even know where to start. I just love the Dynamics GP system. I can't speak highly enough of it. We don't have to recreate the wheel every time we perform repetitive tasks. We get better information, faster and more efficiently. We can share it others and make better business decisions."

Getting Information Out of the System is So Easy

"With our old system, it was very frustrating to know that the data was in there but we couldn't get to it. I felt like we had to be programmers, typing in command lines and queries, to get reports. Now, even for people who are not technical at all, SmartLists in Dynamics GP are great. If we are looking for a quick answer and don't want to scroll through all the GL accounts, we can do a SmartList and get the information very quickly. Then we can just click a button and export it to Excel."



CAL Business Solutions is a Connecticut Microsoft Partner focused on Dynamics GP (Great Plains) and Acumatica financial management/ERP systems. The company offers implementation, data conversion, customization, training and support to over 300 customers nationwide.

- Serving customers since 1982
- Dedicated in-house development team
- Microsoft Dynamics GP Integration Experts
- Small company values, small company focus

“Having access to financial data is empowering. We love to help our clients use Microsoft Dynamics GP reporting to get the right information to the right people.”

*George Mackiewicz, President,
CAL Business Solutions*

Download a Free
ERP Pricing Guide at:
www.calszone.com/30questions

CAL Business Solutions Inc.
200 Birge Park Road
Harwinton, CT 06791
860.485.0910
sales@calszone.com
www.calszone.com

Excel Builder is Like a Christmas Present Every Day

“I love SmartList, but, for me, Excel Builder is like a Christmas present every day. I don't have to regularly generate reports and send them out. I can build whatever report someone needs and put it on the network as a Live Excel Report. I can create reports with trending information and pivot graphs. The reports are easy to read and tell a story for non-financial people. The people who need to analyze the data can just click on the link, and the report is refreshed and up to date.”

Users Do Not Need to Log In to Dynamics GP

“I created many “Live” reports for various team members, including a live Trial Balance GL report, a GL Transactions report, payroll hours trend reports, and vendor reports. They do not even need to have access to Dynamics GP; they can just open up the Excel report. We couldn't generate that information before without manually looking it up and scrolling through each institution. Now, in Excel, we can filter; we can get summaries. We get the big picture and easily filter in on the details.”

Stopped Printing 75,000 Pages a Year

“At one point on our AS400 system, I calculated that we printed 75,000 pages of financial reports annually. Now we don't print anything, we just save to PDF in Dynamics GP. We no longer need to look through binders to get historical data; the reports are searchable, and everybody has access.”

Processing Payroll Takes a Few Hours Instead of a Few Days

“We added Payroll functionality when it became free with the core licensing; now we have 425 on Dynamics GP Payroll. In the past, processing payroll took two days, start to finish. Now, it can be done in half a day or less. As soon as payroll is processed, the Live Excel report is refreshed. The team can look at it anytime without someone remembering to generate it and send it to them.”

Electronic Filing Saves Me So Much Time

“We use add-on tools such as Greenshades for tax filing and Integrity Data for ACA reporting, which integrates with our healthcare billing software. Filing 941s and generating W-2s and 1099s are now so much easier. Once we verify our totals, we just push a button. This saves me a lot of time.”

In 10 Seconds, Entries Are in GL and I Can Move On With Life

“In the past, we had a junior accountant who manually entered month-end journal entries. It would be a full day or two to enter the data, run a trial balance, and make sure everything ticked and tied. Sometimes there were input errors, and there were thousands of lines to check. Now, my Excel spreadsheets used for month-end journal entries can be automatically imported into Dynamics GP using Infinia Integrator. It is much quicker and it cuts down on keystroke errors. I right-click, paste, import, and in ten seconds it is in the GL. I can tie it out and move on with life!”

I Would Recommend CAL to Anybody

“I will admit that our project started off a little bumpy, but CAL took action to resolve that. Our project manager at CAL is very methodical. Anything I give to her, I trust that it is going to come back, and it is going to be right. Anyone I deal with at CAL is a pleasure to work with – they are all friendly, professional and good at what they do! I would recommend CAL to anybody.”

Church Homes, Inc. now has access to its data and is empowered to create its own reports. Powerful add-on tools make its Dynamics GP system even more efficient.

I don't have to regularly generate reports and send them out. The people who need to analyze the data can just click on the link and the report is refreshed and up to date.

Ruth Donahue, Controller, Church Homes, Inc.