

Customer success story

Taikura Trust

Industry

Not for Profit



Location

New Zealand

Greentree product suite

Financials

Fixed Assets

Purchase Orders

Job Costing

Screen Customisation Manager

# TAIKURA TRUST MAKES EVERY DOLLAR COUNT

## BUSINESS BENEFITS

- Excel integration extracts only the most relevant information. 110 reports can be condensed into a two-page summary, reducing the time involved from four hours to 10 minutes.
- Job cost modification easily accommodates unique not-for-profit needs. This enables better tracking and monitoring of periodic payments to individuals.
- Greater visibility and analysis of financial transactions improves management practices and decision-making. This enables the organisation to stay within funding caps.



"We use Excel extensively for reporting so for us, the ability to use the Excel integration for analysing, customising and improving the presentation of our reports is outstanding. Most importantly, Greentree enables us to work strictly within our discretionary funding limit."

**William MacPherson**, Commercial Manager,  
Taikura Trust

The financial management success of this community-based trust is directly related to Greentree's adaptability to its unique needs.

## Business challenge

Taikura Trust facilitates support services for people under 65 with physical, intellectual or sensory impairment. Taikura's Commercial Manager, William MacPherson says the organisation had a unique requirement to raise invoices for its discretionary funding whilst at the same time ensuring it didn't exceed its capped limit. Achieving this would require more sophisticated job costing and data analysis.

Taikura's former Accounts Officer Paula Lynn said reporting in MYOB had become unwieldy, with the production of 110 reports containing duplicated and unnecessary information. Although MYOB was long gone when he came on board, William confirms that the Trust had outgrown its capability. The local Greentree Business Partner was engaged to implement Greentree after a successful demonstration proved it could deliver greater reporting efficiency.

## Customisation shrinks reporting task from 4 hours to 10 minutes

In most not-for-profit organisations, donations and funding are purely voluntary, so there is no statutory obligation for those making contributions to pay. This being the case, there is no need to raise invoices; however Taikura did need to raise invoices to government departments. The process for doing this in MYOB had become unmanageable due to the requirement to replicate invoice data in 110 reports.

Taikura uses Excel spreadsheets extensively, so the Greentree Business Partner created a procedure using Greentree's Excel integration to extract all the relevant data automatically. This resulted in the dissemination of only the most relevant information into a two-page summary. What used to take four hours in MYOB, now takes 10 minutes in Greentree.

## Simple job costing modification made to fit not-for-profit needs

William notes from his experience that few systems offer the flexibility to cater to the business needs of any type of business, particularly not-for-profit. He has been



impressed by how the Greentree Business Partner has been able to make Greentree's job costing fit Taikura's unique needs.

Since the Ministry of Health allocates a set sum of money for individuals, it isn't an option for Taikura to exceed that figure. A relatively simple modification to the job costing module has enabled Taikura to use job costing to stay within the set limit through better tracking and monitoring of money paid to individuals on a periodic basis. This helps William fulfil the financial management responsibilities of his role, by accurately paying the correct amount to the right person at the right time.

### High visibility of financial transactions invaluable

Before the decision to implement Greentree was made, William was aware that for the most part, management was struggling to keep up with the complexity and size of Taikura's finances. Financial

data was prone to inconsistencies due to the manual nature of many processes. This meant financial records could not be relied upon.

William states that, "Greentree gives us high visibility of all financial transactions and the ability to drill down through various layers of information if we need to. For example, I can find out very quickly what was paid to a service provider instantly, and that has most definitely improved our management practices. Basically, Greentree prevents us from ever exceeding the capped sum of funding the Ministry gives us, and that is what it's all about."

### Plenty of room to grow

William recalls that when the original team evaluated Greentree, they were looking long-term, particularly since not-for-profit organisations don't have the budget to change their business systems very often. He has no doubt that Greentree will meet the financial and business development needs of Taikura for many years to come.

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...taikura**trust**  
valuing difference and  
supporting inclusion

Taikura Trust was established in early 2002 and became the provider of needs assessment and service coordination (NASC) services for people under 65 years, living in the greater Auckland region. Taikura Trust is the Auckland region's single facilitator of support services and is committed to being the knowledge hub for all matters concerning disability.

[www.taikura.org.nz](http://www.taikura.org.nz)

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