

UNITED WAY SERVICES

Solution Overview

Industry

Not-for-profit agency

Microsoft Business Solutions Partner

Merit Solutions

Scenario

United Way Services sought to replace its existing mainframe accounting system with a flexible, affordable, easy-to-use system that also provided outstanding reporting capabilities. Microsoft Business Solutions, Great Plains provides United Way Services all those benefits—and more.

Company Profile

United Way Services provides fee-based accounting services—including payroll processing, financial-report generation and vendor payments—to Ohio not-for-profit organizations.

Benefits

Microsoft Business Solutions, Great Plains provides United Way Services with easy access to information, seamless transaction processing and fast year-end processing. It also helps United Way Services continue to provide affordable, high-quality service to its customers.

Software Used

Microsoft Business Solutions, Great Plains

- General Ledger with AFA
- Receivables Management
- Payables Management
- Bank Reconciliation
- Report and System Manager
- Integration Manager
- eView
- eRequisition
- Advanced Purchase Order Processing
- FRx Advanced
- Multidimensional Analysis
- Account Level Security
- National Accounts
- Intercompany Processing
- Explorer

Demographic Information

Annual Revenue: \$40 million
 Number of Employees: 100
 Number of Users: 23
 Number of Sites: 1

Migrated to Microsoft Business Solutions, Great Plains from a mainframe system with custom-developed software.

Microsoft Business Solution, Great Plains is helping United Way Services provide high-quality accounting services to its not-for-profit organization customers.

United Way Services is a Cleveland-based service bureau that provides fee-based accounting services to not-for-profit agencies in Ohio. The services it provides—which include payroll processing, financial-report generation and vendor payments—are vital for those not-for-profit agencies that lack the staff, expertise or systems to handle these duties in-house. “Some of these agencies do not even own an adding machine or computer,” says Linda Petta, United Way Services’ Assistant Director of Finance.

By taking advantage of the services provided by United Way Services, partner agencies can focus on their day-to-day activities without worrying about such matters as data accuracy and ordering, signing and even mailing payment checks.

United Way Services has been providing these types of services to other not-for-profit agencies for more than 50 years, and currently handles accounting-related duties for 48 separate agencies and deals with four different fiscal years. In 2001, the organization inputted more than 460,000 transactions and printed more than 40,000 checks.

‘A Very Hard Sell’

By the late '90s, decision makers at United Way Services realized the agency would soon need a new financial and accounting solution. Its mainframe system, which made heavy use of custom software and onsite programmers, wasn't Y2K-compliant. What's more, “there was no operating system available to keep the old mainframe going,” Linda says.

Deloitte & Touche helped United Way Services analyze their business requirements, complete a selection process and deploy their new business system successfully. The new system had to be flexible, affordable and easy-to-use. Most of all, though, it had to provide outstanding reporting capabilities and be able to serve a wide range of customers. “The people we work with range from the receptionist who also does the accounting all the way to CPAs,” Linda says. In implementing a new system, “we didn't want to give our customers culture shock,” she says. Thus, the new system had to provide reports that were not only highly accurate, but also similar in appearance to what customers had previously received.

United Way Services looked at several different software solutions, ultimately choosing Microsoft Great Plains. “We thought Great Plains was the best use of our dollars,” Linda says.

Despite the choice, Linda was nevertheless unsure that Great Plains could provide all the capabilities her old system provided. “I was a very hard sell,” Linda says. “I was convinced there was no software to replace what we had.”

I was convinced there was no software to replace what we had. Fortunately, working with our partners at Deloitte & Touche, we found Microsoft Business Solutions and it was the best decision we could have made!"

Linda Petta
Assistant Director of Finance
United Way Services

Spreading the Word About Great Plains

Great Plains quickly made a convert out of Linda. "It was the best decision we could have made," she says. In fact, Linda's become such a believer that she consistently attends Convergence, the Microsoft Business Solutions customer conference, which is held each spring. During the conference, Linda spends time explaining to other Microsoft Business Solutions customers and prospects how to successfully use Great Plains in a not-for-profit, multi-company organization.

In addition, Linda touts the benefits of Great Plains to other United Way agencies, occasionally even hosting software demonstrations. As a result, four other United Way organizations have purchased Microsoft Business Solutions, Great Plains.

Return on Investment

United Way Services' investment in Microsoft Business Solution, Great Plains is paying off in many ways, including:

- **Easy access to information**—Great Plains gives United Way Services access to a wealth of data and information that wasn't available from its old system. It also allows outside customer agencies to run reports and make inquiries online. "Where once only we at United Way Services had access to the accounting system, many of our agencies are now able to access the software remotely," Linda says.
- **Fast, seamless transaction processing**—The Great Plains Integration Manager module allows United Way Services to quickly process transactions far faster than it could using its old system. In fact, the system performs so well that United Way Services was recently chosen to distribute a grant to the former employees of a steel manufacturer that went bankrupt, a process that will require it to process and distribute more than 12,000 checks.
- **Simplified year-end processing**—With its old system, United Way Services wasn't able to process multiple year-ends that closed at different times—a capability it now has with Great Plains. In addition, year-end processing now requires one employee, instead of the two it previously required.
- **Increased employee productivity**—Before implementing Great Plains, much of United Way Services' staff was engaged in what Linda calls "heads-down data-entry." Now, Great Plains allows staff members to focus on additional, more-productive activities.
- **A simplified audit process**—United Way Services' outside auditor periodically conducts a test of the agency's internal controls and transactions. "Before, we had to create all the audit spreadsheets and detail, which took a lot of time," Linda says. "Now, the auditor comes in, sits down at a PC, enters a view-only user ID and performs the audit onsite. That reduces our audit time substantially."
- **A continued commitment to service**—Perhaps most important, Great Plains allows United Way Services to continue providing the affordable, high-quality service its customers have relied upon for nearly half a century. "Great Plains allows us to leverage our dollars to provide a state-of-the-art accounting system for our many different agencies who would not otherwise be able to afford this software solution," Linda says.

For more information about Merit Solutions, visit <http://www.meritsolutions.com> and for information about Microsoft Business Solutions, visit <http://www.microsoft.com/BusinessSolutions/>

© 2002 Microsoft Corp. All rights reserved. All company and product names included in this document may be trademarks or registered trademarks of their respective companies.