Success Story

Sage Intacct grows productivity at East Malling Trust

Horticultural research charity gains time and efficiency boosts through Sage Intacct software

The Trust has evolved over many years; its origins date back to 1913 with the purchase of 22 acres of land at East Malling to establish a fruit-growing research station. In 1921 it evolved to become a research facility promoting experiments in horticulture, with the land gradually added to until it exceeded 500 acres by the 1950s.

Today, the Trust is a charity and limited liability company that raises funds for horticultural research through various income streams, including management of its land and property; weddings and conferencing; and professional short courses for land-based industries.

The Trust is based at Bradbourne House, a Queen Anne Grade 1 listed building surrounded by 20 acres of parkland, with a large lake and stream. It has a board of eight Trustees made up of leading members of academia, business and the perennial crops industry.

Key outcomes

- 50% quicker to compile board reports
- Sped up pay run process by 75%
- Halved the time to do quarterly VAT returns
- Bespoke dashboards for users to see only the data they require
- Improved debtor management

Company
East Malling Trust

Location
United Kingdom

Industry
Non-profit

Sage Products
Sage Intacct

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east malling trust

About East Malling Trust
East Malling Trust is a charitable organisation that supports scientific research into the horticultural industry.

Sage

Staying with the Sage family

Having used Sage Financials previously, Karyn Hood, Management Accountant and Company Secretary, was already aware of the benefits that a cloud platform and dimensional ledger can provide. When Sage Financials was discontinued, Karyn did her due diligence reviewing the alternatives Assessing other options on the market, Karyn says it was quickly apparent that there wasn't anything that would meet their needs outside of the Sage family. "We were recommended Sage Intacct, the latest cloud-based accounting platform from Sage."

The system provides rich financial insights and adds significant value by automating complex business processes, reducing manual effort and empowering decision making. Laura Lee, Sage Intacct Corporate Account Manager, comments: "Sage Intacct is a fantastic product that was built on the cloud from day one. It has more power than previous products and being modular, can easily scale and grow to support our customers as they evolve."

Karyn says the fact that it was a cloud-system, with the promise of being "built for finance by finance", made it an attractive choice. "I have always found Sage to be good communicators, and responsive to concerns and ideas. Their customer service is second to none, so ultimately I wanted to stay with Sage," she adds.

Dashboard paradise

A key feature of Intacct that has benefitted East Malling Trust enormously has been the unique user dashboards. Karyn has designed bespoke dashboards for individuals and teams, simplifying and speeding up day-to-day tasks for the core users across the Trust. "The facilities team have a simplified dashboard that lets them raise a purchase order or add a case; I've also embedded a link to Salesforce. That is all they see when they log in, so it eliminates them having to click through lots of pages to find the information they need," explains Karyn.

Spencer, the Estate Manager, has a dashboard that instantly gives him a view of all property related items, such as expenditure on planned maintenance and reactive maintenance. "I have it broken down by property so he can log in daily and instantly see what has been spent versus what is budgeted for, per property."

The Trust's Executive Director Sally has a dashboard view that contains cash flow, balance sheet, P&L, and various KPIs. The dashboard function allows her to instantly see all of these core metrics when she logs into Intacct, but she can also drill down into the detail if she wants to. "The dashboards within Sage Intacct are an excellent tool. It gives me the ability to make the whole system run more easily for all of the Trust's core users," adds Karyn.

The automated statistical reporting within Intacct has improved East Malling Trust's debtor management.

Improved debtor management

Sage Intacct has given East Malling Trust the ability to do automated statistical reporting, which Karyn says has been a big advantage for managing its debtors.

"A large part of what we do is essentially being property managers. We have 27 houses across the estate and around 60 commercial tenants leasing office-space, and we offer a concierge service. This all generates a lot of overheads such as electricity, phone systems, franking/postage costs, so these have to be billed out every month," explains Karyn.

Previously, these costings were manually inputted into Excel spreadsheets, allowing room for user error, and meant figures quickly went out of date.

"Operationally it has made us much more live and more current. We're getting our invoices out quicker, which means we're getting our money in quicker," says Karyn.

Halved the time for partial exemption

As a charity, the Trust has really specific partial exemption processes that it has to do every quarter as part of its VAT return. Karyn says there is not an accounting system in the world that will ever be able to do the calculations for you "as it is so complicated", however, Intacct is able to take the data in a much easier format, which has massively sped up the process for Karyn.

"It used to take me 16 hours every quarter to do our partial exemption VAT return; using Intacct, it now only takes me 8 hours once a quarter. It has halved the time," says Karyn.

Essentially, Intacct provides Karyn with the ability to categorise items within the system using a feature called cross company dimensions. "I can now create classes, departments and locations - almost a set of rules - so that when someone chooses something, they have to allocate it under a class, department or location. Any charity dealing with partial exemption will be able to use the system to do something very similar."

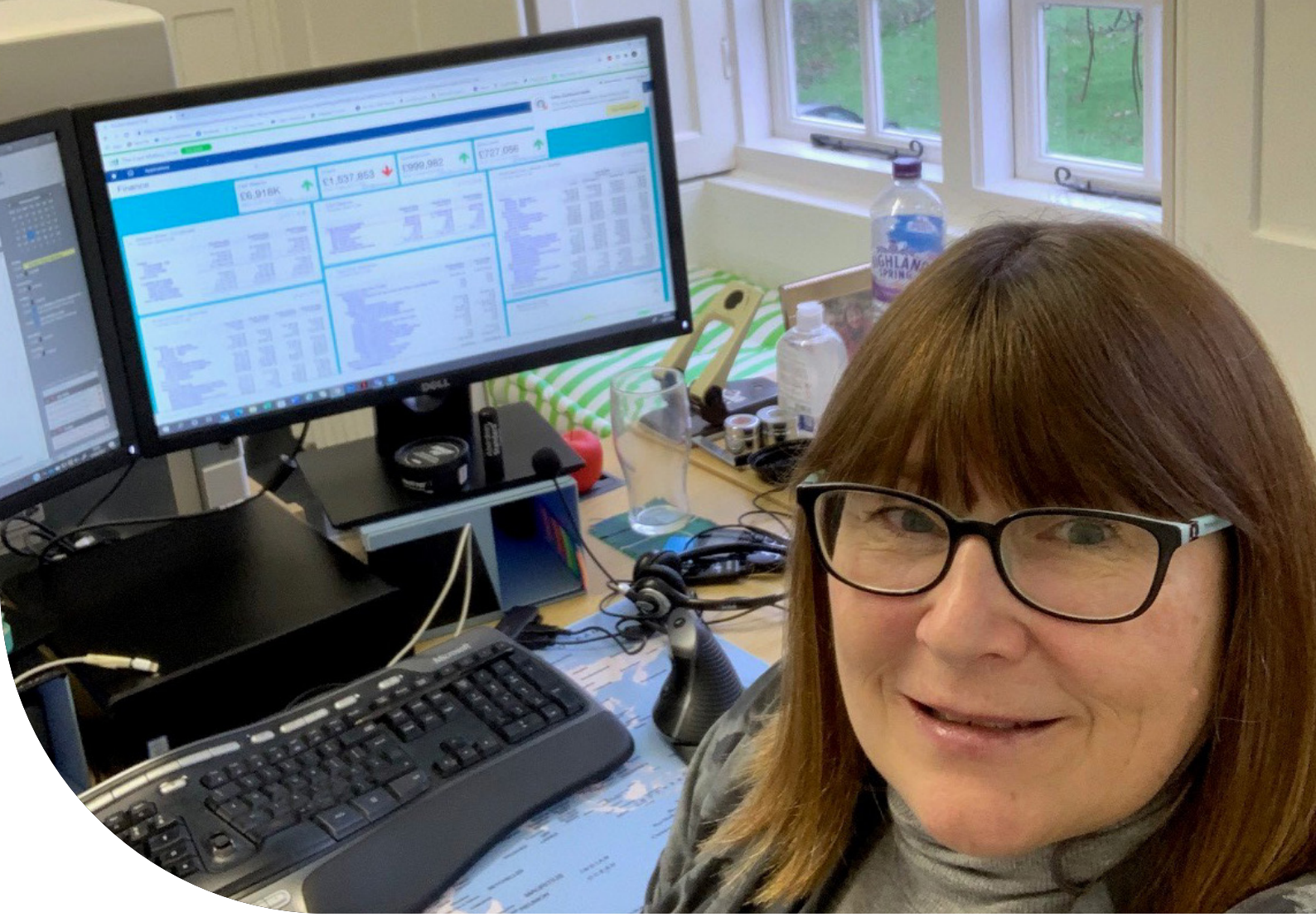
Quicker board reports

Intacct has streamlined the process of compiling the quarterly board reports for Karyn.

"I would say that because of the more intuitive reporting and no longer needing to put everything in a spreadsheet, it has made it 50% quicker for me to produce the quarterly board reports," says Karyn.

All of the data lives within the Intacct platform, allowing Karyn to easily produce board reports with just a few clicks. The statistical reporting has meant the Trust can capture KPIs across the whole organisation and even drill down to see KPIs on individual properties.

"I can literally create one board report featuring the key metrics that our Executive Director needs to have, and then another report for our Trustees. I can also add our logo and pie charts and make it look pretty," laughs Karyn.



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Karyn Hood
Management Accountant and Company Secretary, East Malling Trust

Painfree pay runs

Another win for the Trust has been with Intacct speeding up the pay run process by 75%. "Steve, our Purchase Ledger Clerk, has now gained confidence doing the pay runs via Intacct and can't believe how much easier it is. For unconfident IT users, Intacct is very intuitive and user friendly," says Karyn. Intacct has also removed the need for paper invoices. "Everything comes in by email and we just upload it as a PDF directly into Intacct now," she adds.

The right move

Asked what has impressed her the most about the new software, Karyn says it is the ability to make the system work for each and every level of user. "I can limit what each user sees; this means I can protect any sensitive data, but also allows me not to bombard users with irrelevant information." Being fully in the cloud has been invaluable during the pandemic, as all of the Trust team are working disparately. "This will also benefit us when we are all back on site as our estate is vast, so it can take 50 minutes to walk from one site to another." She adds that she has been "blown away by the support" from the Sage Intacct team, and that she would definitely recommend Intacct. "It's a good accounting system; that's grown up but also playful. It allows you to report in interesting ways."

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