

Customer success story

Southern Cross Care Inc

Industry

Not for Profit

Healthcare

Property Development

Location

Australia

Greentree product suite

Financial Management

SOUTHERN CROSS CARE DISCOVER THE BEST WAY TO WORK



“Greentree has really enhanced the finance department, improved roles and efficiencies across the board. Even after only a short time using Greentree, it’s been great. We envisage no problems and believe it’s the right product for our organisation.”

Danny Assabgy, Finance Manager, Southern Cross Care Inc

Southern Cross Care Inc is a Christian, charitable, community service organisation. With the support of the Australian Government, Southern Cross Care plans, builds and provides the management for a network of lifestyle villages for the over 60. Throughout 26 locations in ACT and NSW, Australia, the organisation manages over 55 facilities comprising hostels, nursing homes and retirement villages and employs a team of 800 including nursing, administration, food and hygiene and maintenance staff. The ever-growing need to provide services and ‘a great place to live’ for ‘yesterday’s pioneers’ has seen Southern Cross Care become one of the largest aged care provider in Australia. In the last 10 years it has seen a 600% growth rate and each year builds 4-5 additional facilities.

As a not-for-profit organisation the management team need to manage this growth and improve efficiencies across the board with the latest technology available. The move from the accounting software system CBA 2000 to Greentree enables a centralised accounting system for the 55 facilities. Danny Assabgy, Finance Manager, says, “Every organisation has to keep up with the latest technology with a modern system. CBA 2000 accounting software was a good

product at the time with a good level of technology. However, in order to manage the growth we needed to update the system and use better technology rather than increase the staff count. We were making too many demands of CBA 2000. Greentree will easily be a good fit for us for the next 5 years plus.”

After using CBA 2000 for over 14 years Southern Cross Care were keen to retain the familiarity of the system, but take full advantage of the increased functionality of Greentree. Danny explains the decision following a detailed demonstration and training session, “We were convinced from day one to change to Greentree. We are very confident that Greentree is good for our organisation as it gives us the continuity of the CBA 2000 knowledge and is a smoother change in terms of training. There are a number of things we need to improve and Greentree gives us this capacity; overall it is a faster system. As a non-profit organisation we were pleased that Greentree was implemented to schedule and budget.”

“Very, very, familiar”

Margaret Harvey, Southern Cross Care’s Accountant, is already reaping many benefits from Greentree. “Everything is even better in Greentree; it provides many modern functions. It’s a lot easier to use as we prefer to use Excel and its good not having to re-key information anymore.” Margaret continues, “Greentree’s a pretty close set up to CBA 2000, but being Windows based it allows all the information

to be displayed on the screen in one hit. Also, with the user defined functions, it's all very comprehensive and is basically heaps of help! The simplicity of Greentree is being to check the information on the system, review and change it before printing one or all reports."

“Very, very, integrated”

Greentree's integration with Microsoft Excel has achieved their aim of improving the accuracy and flexibility of reporting. Margaret explains, "The functionality of updating journals and budgets is much improved – it's all done in Excel now. It just sucks up the data and I don't have to key it in. Using formulas in Excel is ideal as it's just the figures that change. It's an automatic process that saves heaps of time!" Explaining the process of sending monthly reports to each facility Margaret says, "With CBA 2000 we used to print and fax or send all the reports to each facility. Now in Greentree we can email the reports saving time and mailing costs. The reports are received instantly rather than a week later. Simple!"

Danny believes producing the management reports for the Board of Directors is far superior. "In order to report to the Board I need to produce quick and accurate reporting. By tailoring my reports in Greentree, I can now summarise all 55 reports to one page." Commenting on the access to live data, "I can go to Greentree anytime and know the data is current. There is no such thing as rolling months. I can get access to any figures – the flexibility is the key."

The team has also seen vast improvements in month-end processing. "The thing I love most is the 'click of the mouse' for period close and reporting. Using CBA 2000 it used to take 30 minutes to close the period. With Greentree there is no waiting, no processing, and no downtime; it's now done in a

minute. It's so easy to do month-end and the fact that the information is there and 'kept forever' is great," enthuses Margaret.

Being a property developer, the finance team need to know the project costs for each new facility being developed. The team are setting up 'trees' in Greentree to classify information to suit their organisation. "Already we are able to see the cost of projects using trees. Just from one report we can see the work in progress and assets. Before we would have had to look up a number of reports and print it all off. In Greentree there's just new ways of doing things for the better," says Margaret.

The team have benefited from being able to process cheque runs and cancel cheques easily. Margaret describes, "One thing that grabbed me was the ability to run automatic cheque runs, which were manually processed in CBA 2000. The bonus of using Greentree is being able to reprint cheques as it really cuts down on manual processes. CBA 2000 was not this flexible."

With over 800 employees, Southern Cross Care has very complex payroll requirements, specialised for their industry. They will use their stand-alone payroll system and export the payroll information into Greentree. "Greentree easily integrated with our payroll system. We are all set to go for our first payroll run. We are confident about it and feel it's a good solution for our organisation."

Reflecting on the smooth implementation and their progress Danny says, "Greentree has really enhanced the finance department, improved roles and efficiencies across the board. Even after only a short time using Greentree, it's been great. We envisage no problems and believe it's the right product for our organisation."



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