

LUTHERAN EDUCATION SETTLES WITH GREENTREE

Organisational needs often change over five years. Software packages often can't handle an organisation's changing needs. But five years after Lutheran Education Queensland (LEQ) installed Greentree, accountant Julie Rogers is still a proponent of the accounting package.

The business team now uses accounts payable, accounts receivable, general ledger and cash management, and is in the process of installing a module to manage transaction analysis codes, which will eliminate sub codes. "We've got about a thousand codes on our general ledger at the moment – a lot of sub codes," Rogers says. "But with transaction analysis codes, if you've got 15 motor vehicles, for instance, you only need one GL code.

"By putting them into transaction analysis codes you're classing them like a sub code but you can report on everything relating to one business manager. It's a more efficient way of reporting," she says. "And from the data-entry side of things, there's less room for error because you use a drop-down to pick the person the expense relates to."

Rogers expects the new codes to come into effect next year. But LEQ can't make too many modifications.

Because the organisation is non-profit, they are audited every year and must fulfil strict requirements. One example is that LEQ's data and payments must be entered into Excel first and reconciled within each spreadsheet, before being input again into an accounting package.

But now LEQ can upload its accounts receivables, invoices, expense claims, journals and other data from the spreadsheets straight into Greentree, without having to key each line again.

"We used to have to manually enter everything; now we just attach the relative sheet and functions, and upload it. There's very little that we type into Greentree," Rogers says. "Using this function has probably saved about a quarter of the time it used to take. Some of the spreadsheets can contain a hundred invoices, so you can imagine how long it used to take to enter 100 invoices manually. It's been a real lifesaver for us."

Greentree's integration with Excel has also been useful for reporting, and it's one of the things Rogers most likes about the package.



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Julie Rogers, Accountant, Lutheran Education Queensland



"Once you understand what you're doing, you can create any sort of report," she says. "You build a tree in Greentree and then export it to Excel, whereas in a standard package you're stuck with the same old Profit & Loss, Balance Sheet and Trial Balance."

LEQ is considering implementing Greentree's customer relationship management module for its booking management. In the third quarter of the year, in particular, LEQ can run a conference a day, training new teachers. All of these conference bookings are done via LEQ's website.

Rogers says the intention is that the bookings will link in with the website, and will then be uploaded to accounts receivable invoices. It will eliminate the need for an Excel spreadsheet and save hours of input time. Another way Greentree has saved LEQ time and money is by enabling emailed supplier remittances and customer invoices. "We can now pay everything by direct credit, and send a remittance to tell them it's in their bank."

Rogers says Greentree has been easy to use and easy to learn. "We just love the fact you can manipulate it and get out of it what you want." The future is bright for the next five years.

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