Ottawa Regional Cancer Foundation

Streamlining Non-Profit ERP: Small Charity Migrates to Microsoft Dynamics 365 Business Central in Less Than Four Weeks with the Help of Quisitive

Overview

The Ottawa Regional Cancer Foundation (ORCF), an Ottawa-based non-profit, struggled to manage finances effectively due to an outdated ERP system. The lack of multi-segment coding made it challenging for ORCF to allocate costs accurately and report activities to tax authorities. Additionally, the solution's on-premises server was approaching end-of-life, causing further complications for the organization.

OCRF realized the need for a modern cloud ERP solution to address these issues and improve financial management and reporting. After careful consideration, the organization partnered with Quisitive and migrated to **Dynamics 365 Business Central**.

With Business Central and custom apps developed by Quisitive, ORCF has been able to improve productivity, ensure the accuracy and accessibility of financial insights, and increase the understanding of cost drivers for better decision-making.

About ORCF: The Voice for Cancer Survivorship in Eastern Ontario

Founded in 1995, ORCF supports cancer patients and survivors in Eastern Ontario. The foundation operates two main business lines: fundraising and patient support delivery, providing person-centered care to cancer patients. ORCF achieves its mission by offering innovative cancer research, a world-class clinical trials program, and increasing access to care in the region. ORCF's patient-focused approach and commitment to providing high-quality cancer care and support has earned ORCF a reputation as the voice for cancer survivorship in Eastern Ontario.

The Challenge: Relying on a Legacy On-Premises ERP System & Server Approaching End-of-Life

Before launching Business Central, ORCF's on-premises ERP system was causing significant challenges for the organization. The systems' shortcomings increased manual work, errors, and confusion regarding the organization's financial landscape. To overcome these challenges, ORCF recognized the need for a modern cloud-based ERP solution that could provide advanced features such as multi-segment cost coding, automated workflows, and robust controls that could operate seamlessly in a remote work setting.

ORCF's decision to migrate to Business Central with Microsoft Partner, Quisitive, was based on several factors:

- Quisitive's excellent reputation in the local non-profit market
- The non-profit pricing offered by Microsoft
- The multi-segment coding feature of Business Central
- Automated workflows for approvals
- Business Central's off-the-shelf functionality
- Quisitive's ability to develop custom applications for employee expense approvals and credit card reconciliation, which would round out the scope of the project needs.

Getting Started with Business Central in Less Than Four Months

ORCF's finance team worked closely with Quisitive to plan and launch Business Central in just four months.

"We knew it was time to look for a new ERP solution that could meet our financial management needs and support a remote work environment brought on by the pandemic."

JASON KEMPT

Vice President, Finance & Administration, ORCF

The implementation process also involved Quisitive creating custom Business Central apps to streamline processes and improve efficiency. One of the custom applications created was an employee expenses app that allowed users to scan receipts and enter expenses, which would then be routed for approval. The credit card reconciliation app automated data entry and eliminated the need for paper. Statements were sent to cardholders and imported into the app, which would then translate the expenses and route them to the unit for approval.

Implementing Business Central and Quisitive's custom apps resulted in significant time savings and improved organizational efficiencies. The ORCF was also able to generate more accurate and accessible reports. The workflows for purchase requisitions and employee expenses were much more user-friendly and efficient than the previous processes, which staff members were very pleased with.

"Implementing Business Central was smooth and efficient thanks to Quisitive's expertise and support," *said Jason.*

Impacts of Dynamics 365 Business Central at the Ottawa Regional Cancer Foundation:

Since launching Business Central, ORCF has experienced substantial enhancements in its financial management processes. Multi-segment coding has enabled them to understand cost structure more effectively, while automated workflows for approvals have streamlined operations, saved time, and enhanced productivity. With real-time reports based on accurate data, ORCF now has the information they need to make informed decisions quickly. Overall, Business Central has been a game-changer for ORCF, providing them with the necessary tools to efficiently manage their finances and support their mission.

Improved Productivity and Efficiency:

Automating requisition and expense workflows and enabling cloud-based document storage and retention in Business Central has resulted in faster delivery of month-end reports and easier day-to-day financial management. ORFC's finance team can now complete tasks more efficiently and accurately, allowing them to focus on more strategic and value-adding activities.

"Business central has made our entire organization more productive and informed," said Jason. "The multi segment reporting helps non-financial users understand the cost behaviour of our business and we can produce timely financial data and reports without Excel."

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Enhanced Accuracy of Cost Allocation with Multi-Segmented Reporting

Business Central's multi-segment reporting (or dimensions) has improved the accuracy and allocation of costs. By eliminating the need for manual work to allocate central costs to business activities, dimensions have provided a deeper understanding of cost behavior within the organization.

Increased Accountability and Better Decision-Making

With Business Central, ORCF can easily toggle between budget accountability and the full cost of business activities, including support functions with different budget holders. This visibility has increased accountability on the expense side and facilitated informed decision-making. By providing a clear picture of cost drivers for business activities, Business Central has empowered ORCF to allocate resources more effectively.

Streamlined Expense and Credit Card Reconciliation

Quisitive's custom-built employee expense and credit card reconciliation apps for Business Central have significantly simplified ORCF's reconciliation process. With the employee expense app, employees can easily upload photos of receipts or attach PDF invoices to an online form, freeing up their time and streamlining the process. The credit card reconciliation app automates data entry, reducing the chances of errors and saving time for both employees and managers.

"The employee expense app is great," said Jason. "Employees can take pictures of receipts or attach PDF invoices and upload to an online form—which automatically routes for approval. This app has saved a lot of clerical time and puts the onus to code things properly on the business user. Lastly, the approved document makes a properly coded A/P entry in Business Central for the accounting staff to post."

"With the new credit card reconciliation app in Business Central, manual data entry has become completely unnecessary," continued Jason. "Because the corporate credit card user pre-populates the form with transactions from the bank via CSV upload, everything is done quickly and without errors. This has saved us days of work and ensure our costs are accurately reported."

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>
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Greater Accessibility & Flexibility

As a cloud-based solution, Business Central offers ORCF complete accessibility and security. Staff can now access the system and data from various devices, allowing them to work remotely or in different locations. Additionally, automatic updates and upgrades eliminate the need for IT staff to manually install updates on a server or individual devices, ensuring that all users are using the latest version.

ORCF continues to enhance its financial management processes in Business Central while exploring more advanced features to identify opportunities for improvement. With their focus on becoming more proficient in the core product, including the fixed assets module, ORCF aims to stay ahead of the curve. Their dedication to leveraging technology and innovation to support their mission highlights their commitment to driving success for the organization and the community they serve.

Unite Your Entire Organization with Dynamics 365 Business Central

Manage your entire organization with one solution and enable access from anywhere, anytime. Contact Quisitive to learn about your options or to book a Business Central Migration Assessment.

Begin your cloud ERP journey

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