

Sage Intelligence is so efficient, it's fun to use



Since 1928 Community Nursing Services (CNS) has been touching the lives of Utahns when they are at their most vulnerable and most in need of compassionate care. This nonprofit home healthcare service provider has ten offices across the state, several coalition partners, plus an active charitable care program.

The organization is deeply embedded in the community, providing specialist care to almost 100% of the state's citizens across all age ranges and levels of need. It's team considers it their privilege to serve their community as they do.

From frustration to flexibility in three short weeks

With 36 cost centers, 5 operating divisions, 10 offices, and several other direct and indirect outlets, one of the qualities CNS most requires of its business intelligence solution is flexibility. By the same token, as a nonprofit organization, the habit of making the most of its existing resources is deeply ingrained in the culture, so the team tried their best to work with the software program they had for as long as they could. That program was Microsoft® FRx®. The straw that finally broke the camel's back was intense frustration at the inability of FRx to define multiple criteria within one row.

In November 2013 they made the decision to invest in Sage Intelligence and have been massively rewarded not only by the flexibility it provides, but by the many other useful features. Within two weeks Sage Intelligence was installed, and CNS's consultant, Eric Anderson from Eide Bailly LLP, had linked all their systems to Sage 100.

Challenge

CNS was using Microsoft® FRx® for financial reporting and analysis. (This is a legacy Microsoft system that Microsoft no longer supports.) However, with 36 cost centers and ten offices across Utah, each working within up to five operating divisions, CNS needed an accounting solution that offered flexibility and the depth of business intelligence that would enable improved management decisions for optimal operation at individual cost center level.

Solution

CNS installed Sage Intelligence.

Results

The CNS managers now have the power of true business intelligence at their fingertips, enabling them to make the best possible business decisions and operate at optimal efficiency.

Customer

Community Nursing Services (CNS)

Industry

Nonprofit home health provider

Location

Across Utah, U.S.

Number of locations

10 offices and several coalition partners

System

Sage 100

“The difference between FRx and Sage Intelligence is like the difference between night and day.”

Scott Acton
VP Finance & CFO, Community Nursing Services

What's more, the General Ledger was set up, they had a good replacement Profit & Loss statement, and they were able to convert their line structures. By week three they had entirely replaced FRx with Sage Intelligence.

Many features combine to make Sage Intelligence the ideal solution for an organization of this scale and complexity.

Easy to learn and use

To get started with Sage Intelligence, Scott watched a couple of YouTube videos, but most of his learning was done by actually using the program. The highly intuitive user interface, its flexibility and Scott's own knowledge of Excel made it super easy to get up and running.

Managers around the state can see the financial impact of their decisions

Scott Acton, CNS's VP Finance & CFO, has for years longed for his office managers around the state to understand and interpret the organization's Income Statements. "Sage Intelligence lets me put the statistical information that they use every day on the P&L along with the financial information that is affected by those statistics, making it easier for them to connect their responsibilities to the financial impact of their decisions." This has given the managers the confidence to make good management decisions. "The difference between FRx and Sage Intelligence is like the difference between night and day."

Compatibility with Microsoft® Excel®

Because of the way in which Sage Intelligence works with Excel, it has offered many opportunities for improvements in the way CNS works. For instance, the P&L can be expanded into more detail by adding statistical information into the report as well as nonfinancial information.

CNS is now able to report on the number of home visits its care providers make each month, plus the costs per visit. This gives the team a much clearer picture of profit and loss and the costs per employee, and it allows them to work out how many employees they need. In any business this would be a fantastic result for management.

Report Designer add-in to customize financial reports

The Report Designer Add-In gives CNS team formulas and reporting trees, which enable them to customize their financial reports. Reporting trees are now set up for each of the 36 cost centers, and each one is able to drill down to its five business levels.

The time to run the company P&L has been reduced from two hours with FRx to 35 minutes with Sage Intelligence, plus the reports are now a lot more extensive and detailed. Running the

report twice a day ensures that they are always working with up-to-date information.

Report distribution

With the help of consultant Eric Anderson of Eide Bailly LLP, CNS has set up the Sage Intelligence Report Distribution feature on its server and uses it extensively. Each cost center has its own tab, and Scott used the "hide 0 rows" functionality to help him compress the different income statements. He then uses Report Distribution to upload to the server, and emails the links to the different offices.

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Yes, we know it's unusual to see fun listed as an important feature of a financial software system, but it does make an enormous difference to the staff who use Sage Intelligence . . . and it is seriously useful fun. Learning the different ways in which reports can be developed and reformed, understanding the power of the real intelligence that Sage Intelligence puts at their fingertips, and seeing how useful reports can be in making significant business decisions, is a truly exciting adventure for the CNS team.

At the moment Scott is working on using Sage Intelligence as a budgeting tool to project future budgets, and has plans to roll it out to the rest of his finance team in the next month. "We have come such a long way in one year with the information we can now access and the enormous value we add to front line management. We're happy to share our experience of Sage Intelligence because it's a great tool!"

About Sage

Sage energizes the success of businesses and their communities around the world through the use of smart technology and the imagination of our people. Sage has reimagined business and brings energy, experience, and technology to inspire our customers to fulfill their dreams. We work with a thriving community of entrepreneurs, business owners, tradespeople, accountants, partners, and developers who drive the global economy. Sage is a FTSE 100 company with 14,000 employees in 24 countries.

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