Shadforth Financial Group Limited

> " SunSystems ensures efficient financial management for a national organisation with multiple entities & locations. "
>
> Linda Fox, Chief Financial Officer

Objective

Shadforth Financial Group (SFG) purchased 10 groups of companies with 26 entities in 2008. Each group had different accounting and procurement solutions.

After the merger, SFG's objective was to move the entire group of companies to a common platform with standardised processes. SFG wanted to centralise the finance & operation functions and remove time-consuming manual processes that were open to errors.

> " We were looking for a solution which ensures efficient financial management for a national organisation with multiple entities and locations.
>
> We required seamless interfaces and interaction between different functions such as procurement, accounts payable, receivables and cash flow, together with financial management. **SunSystems meets such criteria.** "
>
> Linda Fox - CFO

Requirements

SFG were looking for a broad based financial management system that could deliver the following:

- Easy to use, reliable and flexible in structure to allow for future growth and change

- Automation of intercompany processes across all their entities

- Standardised purchasing procedures adherent to policy across all their entities

- Budgeting & Forecasting capabilities

> " SunSystems was chosen because of its flexibility. SunSystems, an end to end solution, provided a very intuitive and generally easy-to-work-with system that gives better access to information for analysis. "
>
> Johan de Walt
> Group Financial Controller

About Shadforth Financial Group

Shadforth Financial Group, is a national federation of wholly-owned financial advisory firms with 15 offices offering specialist expertise in a range of client-focused financial solutions and services.

SFG is one of the few significant advisory groups in Australia that is not owned or controlled by an external financial institution.

This provides high-quality, personalised financial advice and premium services that assist clients to achieve their financial needs and objectives.

- A general ledger that can handle multi – company, consolidation and intercompany transactions

- Flexible reporting and extensive analysis capabilities to a wide range of users

- Multicurrency functionality

- An Expense claim module

Benefits

The Infor SunSystems solution implemented by Professional Advantage for SFG achieved the following benefits and goals:

- ### Financial & Procurement

  "By implementing SunSystems with iPOS, we were able to move the entire group to a common platform with standardised processes on day one. The centralised finance function was able to publish one source of truth from the merger date."

- ### Reporting

  "Due to the availability of multiple analysis codes, we are able to analyse the company in detail and very quickly."

- ### SunSystems' Flexibility

  "The subsequent acquisition of The Money Managers Group and Keysbrook group of 24 companies in early November was made easy be cause of the SunSystems account structure."

- ### Enquiry

  "The Advanced Inquiry module is one of the most user friendly and useful tools used on a day to day basis from my perspective. We rolled it out to each state management team so that they are able to receive the same information analysis benefits."

- ### Cash flow management

  "With the correct structure being set up and bank reconciliation performed on a daily basis, we are able to provide an up to date cash flow statement daily. This is an important source of information for the organisation."

  Linda Fox – Chief Financial Officer

About Professional Advantage

Professional Advantage has been helping organisations improve how they manage their businesses since 1987. We apply smart people, rigorous thinking and quality systems to business challenges.

Solution Implemented

Infor SunSystems
iPOS eProcurement

For more information please contact:

Sydney :   +61 2 9919 8931
Melbourne: +61 3 9613 0277
Brisbane :   +61 7 3018 2400
Perth: +61 8 6267 7000
Web: www.pa.com.au/sunsystems

professional advantage

SUNSYSTEMS

infor
channel partner