



National Park Association Saves Time and Money with Integrated Business Management Solution

Overview

Country: United States

Industry: Nonprofit organization

Customer Profile

The Yosemite Association, based in the United States, is a not-for-profit organization dedicated to the support of Yosemite National Park.

Business Situation

Yosemite Association had a number of disparate financial systems, which were not effectively integrated and did not provide reliable financial data.

Solution

Yosemite chose Microsoft Dynamics™ NAV, formerly known as Microsoft® Business Solutions–Navision®, to pull together its financial data across the organization.

Benefits

- Detailed financial data meets stringent auditing requirements
- Integrated system eliminates multiple entries
- Strong return on investment
- Increased management of financial data
- Enhanced business management through integrated view of organization

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Beth Pratt, Vice President and CFO, Yosemite Association

The Yosemite Association, based in the United States, is a not-for-profit organization dedicated to the support of Yosemite National Park. Responsible for raising revenues to support the National Park Service, it was operating several disparate financial systems that didn't integrate data across central office and its 16 retail stores, resulting in financial data it could not trust. It chose an integrated business management software solution based on Microsoft Dynamics™ NAV, formerly known as Microsoft® Business Solutions–Navision®, implemented by Microsoft Gold Certified Partner SCS. Since implementing the new solution, The Yosemite Association has gained better management of its financial information by having access to reliable, real-time information across its organization. As a result, it has made significant cost and time savings, while improving the way it manages its business.



The Yosemite Bookstore

Situation

The Yosemite Association, based in the United States, is a not-for-profit organization dedicated to the support of Yosemite National Park. It operates a varied program of association membership, book publishing and sales, outdoor seminars, and visitor services—all designed to raise revenues to support to the National Park Service. But with a central office for accounting, and 16 retail operations, the Yosemite Association found that its financial applications were not effectively supporting the organization.

Beth Pratt, Vice President and Chief Financial Officer of Yosemite Association, says: “We were using several different systems to manage our financial and point-of-sale (POS) needs, which didn’t integrate together. For example, our POS system was a cash register only, which didn’t link into inventory controls. Having a number of non-integrated systems meant it was challenging to get an accurate view of our financial situation. We had to resort to physical inventories just to get numbers and costs that we trusted.”

Yosemite Association was using three disparate solutions for its financial processes. These included AccountMate for accounting, QuickBooks for accounts receivable, and Anthology for POS. The lack of integration among these systems impacted several areas. It was necessary for staff to conduct double, and sometimes triple, entries, which wasted time and reduced productivity. It also meant the process was far more open to errors, providing figures that were unreliable. The association recognized that it required a single, integrated solution to meet its needs.

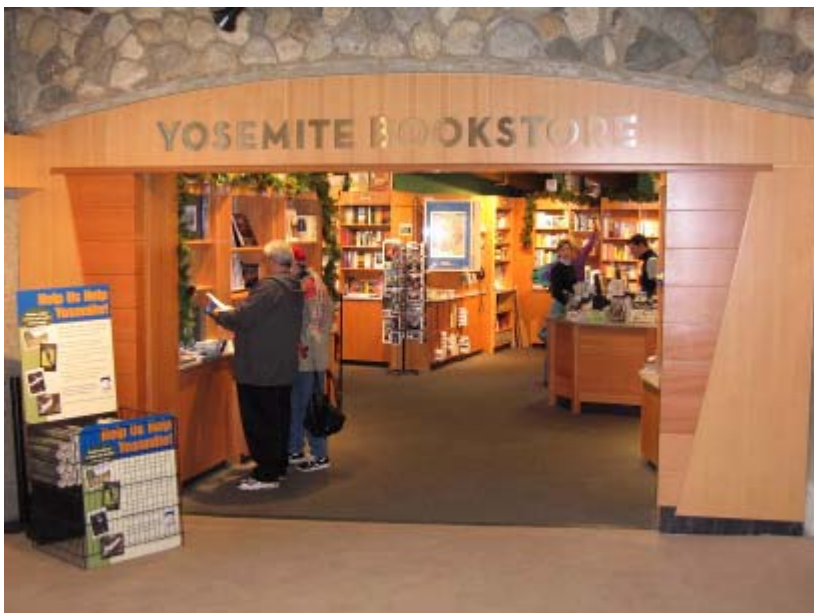
Pratt says: “You can’t make gains in planning inventory management effectively without accurate, timely information. And you can’t run an organization on financial information that you don’t have faith in. We decided it made sense to change from having a patchwork solution to a fully integrated system.”

Solution

In May 2003, Yosemite Association carried out a thorough review of the market, considering business software applications such as Blackbaud, Serenic Navigator, and Microsoft Dynamics™ NAV.

Pratt says: “There were several key factors which led us to select Microsoft Dynamics NAV. First of all, it was a completely integrated solution, which was a must. Second was the ease-of-use, both in customizing the solution and in its ability to obtain data and manipulate it for business analysis. Price was also a consideration, as Microsoft Dynamics NAV definitely offered better value for money compared to most of its competitors.”

Yosemite Association chose Microsoft Dynamics NAV with its own database, and with modules including POS, full inventory



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control, and full financials with Advanced Dimensions, specifically chosen to help analyze sales. SCS, the Microsoft® Gold Certified Business Solutions Partner that had put forward the Microsoft solution, was contracted to make certain customizations to meet the specific requirements of the Yosemite Association.

The Yosemite Association operates in particularly challenging conditions. Firstly, it is in a very remote environment that does not support high-speed connectivity, and is often subject to severe weather, which makes an online, real-time network among its retail operations impossible. DSL lines or wireless connectivity for the retail stores just didn't work. In addition, because Yosemite uses the U.S. Department of the Interior's network to save costs, it is subject to stringent security measures, such as not allowing remote access into the computer network.

Jane Harrison, Project Manager at SCS, says: “The environmental situation made this a particularly tough assignment. We had to synchronize the databases from the various retail locations to the central site, including customer, inventory, and sales information, using the data port technology in Microsoft Dynamics NAV. We also implemented a credit card processing add-on, to allow for real time, Web-based credit card processing. Nothing about this situation was straightforward but the robustness and flexibility of Microsoft Dynamics NAV made modifications possible, resulting in a unique system for Yosemite.”

SCS was able to create automatic synchronizations from all locations which, with support from Microsoft support, were permitted to run separate Microsoft Dynamics NAV databases and licenses, due to the physical connectivity issues. SCS and Yosemite then designed and created automatic synchronization custom POS functionality written directly into Microsoft

Dynamics NAV, complete with touch screen monitors. The result was a single, highly efficient integrated application.

Pratt says: “Jane Harrison, our project manager, went beyond the call of duty to make this project successful. Her project management skills, combined with her knowledge of Microsoft Dynamics NAV, ensured training and implementation went as smoothly as possible. SCS had remarkable confidence and tenacity, and we worked together to make a concerted effort despite the challenges.”

Benefits

CFO Savings of U.S.\$10,000 Annually on Time with Easy-to-Access Data

There have been many improvements in the way Yosemite Association operates since implementing Microsoft Dynamics NAV.

Pratt says: “The single biggest benefit for me as CFO is the ease with which data can be extracted using Microsoft Dynamics NAV. We save U.S.\$10,000 every year on my time alone. Whereas my job used to be very manual, I can now very easily get the information I need to do my job. With a real-time view of the organization, we know what is going on at all times. Before, I had to wait one month after the month was closed for accurate reports. Now it's available immediately. We have up-to-date inventory data and can track funding sources and expenditures. I can spot trends or identify problems at the earliest stage possible. This usually means problems can be nipped at the bud and resolved quickly. I am more in control than ever before, and able to do things I simply didn't have time to do.” Pratt continues, “We are hoping to have a 60 percent return on investment (ROI) on the project, and we anticipate [Microsoft Dynamics] NAV paying for itself after four years.”

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Information Drill-Down Capabilities Boost Business Analysis Ability

The way that Microsoft Dynamics NAV can filter information to get different views of financial information, as well as drill-down to all levels of financial detail, has helped the Yosemite Association with its fund management accountability. This is an important requirement for all non-for-profit organizations, which must present their financials in a way that provides a specific overview of each fund. This usually requires chartered accounts to add multiple segments to allow for full fund analysis, which can be a timely process.

Using Microsoft Dynamics NAV with Advanced Dimensions, the Yosemite Association can divide and present its fund data in multiple formats, meeting all fund analysis requirements easily and simply.

Pratt says: “With Microsoft Dynamics NAV, we can view and present data in different ways, delivering strong fund management capabilities. The ease of pulling data out of the Microsoft Dynamics NAV system has improved our ability to analyze the business this year, from sales through to inventory. When we went through our audit, we were able to drill-down on entries, which impressed our auditors. Before, we had to pull multiple reports in order to provide the information they were looking for.”

Integrated System Saves Multiple Data Entry and Increases Productivity

The benefits of having one, integrated system has had a number of positive impacts on the organization. The most immediate benefit has been the removal of multiple data entries, which were a draw-back of running various systems that did not integrate.

For example, previously when Yosemite processed the invoices of people who bought their books, purchases were entered into the

Anthology POS system. This didn't link with accounts receivable, so this system then had to be updated, which was a timely and cumbersome process.

Pratt says: “Having our data integrated in Microsoft Dynamics NAV has meant we have been able to save on seasonal staff hire, worth U.S.\$15,000. This is simply because re-entry of data is no longer required. In addition, in the cashiering department, we have been able to remove the need for manual processing of the daily remittances, as this is now automatically produced. We estimate that our cashiering staff will save a day a week, so approximately 20 per cent time savings, resulting in increased productivity as they can spend time on more valuable activities.”

Using Microsoft Dynamics NAV has meant Yosemite has better management of the overall cost process. Now that POS, warehouse inventory, and accounting are integrated, it is possible to set up the system to analyze costs against sales for every item sold in the stores, and therefore identify the most profitable areas.

Many manual processes have become automated. For example, each sale now automatically updates inventory levels, which balances purchasing requirements. The reliability of the system means Yosemite will be able to lower stock inventory by 10 per cent. It is hoping this will lead to potential annual savings alone of \$80,000, although this has still to be realized.

Quick Learning Curve with Ease of Technology Integration

An important factor for the association was ensuring the new system was integrated as easily as possible into the organization, with as little disruption to daily business as possible. Knowing staff were familiar with using a Windows®-based system and

Yosemite Association
employee using Microsoft
Dynamics NAV



interface was vital, as it meant there would be a faster learning curve for users.

Pratt says: “If you know other Microsoft products, you can learn Microsoft Dynamics NAV easily and quickly. This is important in getting benefit from the full potential of the system.”

The seamless integration of Microsoft Dynamics NAV with Microsoft Office products has maximized Yosemite’s use of the system. For example, the Microsoft Excel® spreadsheet software is a familiar application that staff are comfortable using with no training at all. This is used for one-off reports from Microsoft Dynamics NAV, especially useful when working with vendors. The system integrates easily with the Microsoft Outlook® messaging and collaboration client, which is useful for e-mailing invoices and purchase orders to vendors.

Availability of Data Helps Identify New Business Opportunities

In addition to business efficiencies and cost savings, the Yosemite Association can see that having access to new levels of business information can deliver significant marketing opportunities.

Pratt says: “We have a deeper insight into our organization since using Microsoft Dynamics NAV. For example, the publishing of our books is an important source of income. With all our 10,000 members in our system, we can now see what they are buying and when. Using Microsoft Dynamics NAV, it is easy to identify sales of our books in each store, compare this to books we buy elsewhere, and look for future

opportunities. We see enormous potential for improving our marketing capabilities as a result of having this information. The opportunities are endless.”

For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234 in the United States or (905) 568-9641 in Canada. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to: www.microsoft.com

For more information about SCS products and services, visit their website at: www.scs-mbs.com

For more information about Yosemite Association products and services, visit the website at: www.yosemite.org

Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems your company already has implemented. By automating and streamlining financial, customer relationship and supply chain processes, Microsoft Dynamics brings together people, processes and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

For more information about Microsoft Dynamics, go to: www.microsoft.com/dynamics

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