

CASE STUDY | NON-PROFIT

West Dean

iplicit



Sector
Education



Previous Finance System
Exchequer



Number of iplicit users
8 finance users and
20 read-only users



Go Live Date
November 2023

iplicit rescued West Dean's Exchequer data after its server crashed just before year-end

The finance team at West Dean had known for a while that the accounting software needed an upgrade. But when a sudden crash left the server "smouldering" a fortnight before the end of the financial year, the issue became urgent.

As that year-end deadline approached, another software vendor suggested the best hope of rescuing the situation was turning to iplicit.

iplicit not only migrated that Exchequer data into a modern, cloud-based finance system but did so in time for a looming audit.

"Things have gone very well, the support team have been very responsive and we've had a great experience so far."



Another software vendor suggested iplicit might be a good option because its team had a lot of knowledge of Exchequer and would have the ability to extract our old data, which had been backed up four days before the crash. The server was basically smouldering and from the conversations we had with other providers, I'm not sure they were confident of being able to extract that historic data, whereas the iplicit team managed it.



Charlotte
Backshall-McGregor
Interim Head of Finance



Things can get very complicated

West Dean runs higher education courses on two locations in the spectacular West Sussex countryside and at London's Design Centre with new premises just opened in Bloomsbury.

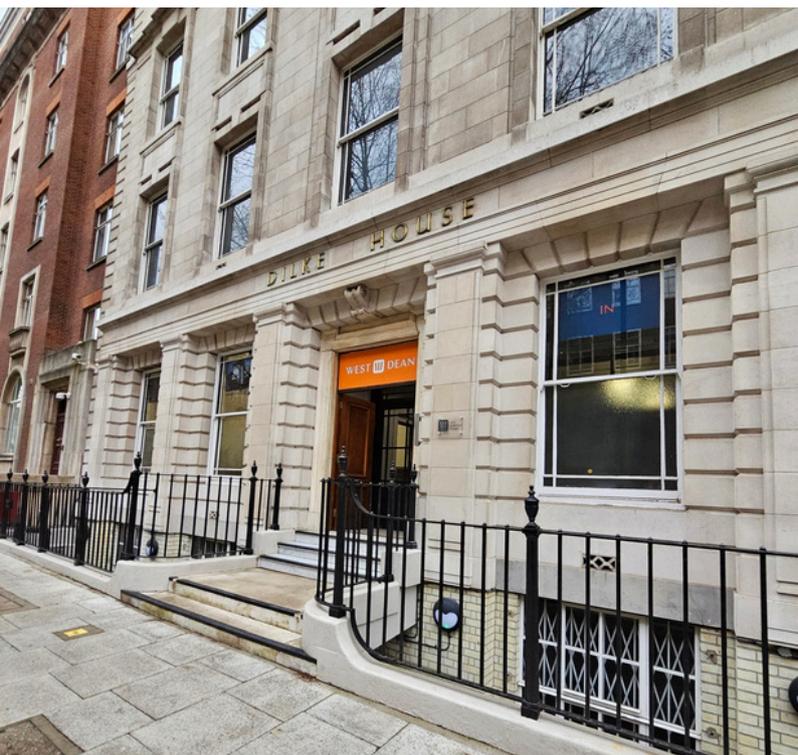
"We're a multifaceted organisation. We provide higher education diplomas and degrees in arts, design and conservation courses at our campuses in London and Sussex, and we also run about 700 short courses over the year," says **Charlotte Backshall-McGregor, Interim Head of Finance.**

"West Dean Limited is the entity responsible for our retail side, dealing with our village store, gardens, events and conferencing. Then there's the Edward James Foundation, the charitable side of our organisation."

Demands on the system include several hundred purchase invoices a week, daily bank transactions and all the everyday business of general ledger, trial balances and P&L. Month-end can be complex.

"With a charitable arm and a limited company, VAT is ridiculously complicated, with a lot of partial exemption and irrecoverable VAT," says Charlotte.

"What's more, we run 71 departments through the system and we're reporting to each head of department or budget holder."



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Charlotte Backshall-McGregor
Director of Finance and Enterprises

Why West Dean needed to change systems

West Dean's on-premises finance system, Exchequer, was under strain and the organisation was considering a replacement even before the server failure that forced the issue.

"The Exchequer version we had was 10 years old and not doing what we wanted it to do. Its reporting was fairly poor," says Charlotte.

"It was on the cards to start looking at our options. Then, in mid-September 2023, our server crashed, with our Exchequer data and many of our other systems on it. And our year-end is on September 30.

"We had a few conversations with software vendors but with year-end looming in two weeks, we really needed a super-quick implementation. We have to report to the Charities Commission and the Office for Students, so we can't delay our year-end processes."

The team worked tirelessly carrying on their work in spreadsheets until a new finance system could be installed.

"Two other providers were suggesting they could do it in three to six months at a push," says Charlotte.

"I'd expect six months for a normal implementation when my head was not on the block, but we had that audit booked so we needed things to move quickly.



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“The server was basically smouldering and from the conversations we had with other providers, I’m not sure they were confident of being able to extract that historic data, whereas the iplicit team managed it.

“We went live with iplicit in around five weeks. It was what I call ‘basic live’, which was enough to get the transactions team working. We weren’t quite there with all our year-end reconciliations but we did complete it just in time for our Christmas audit.”

‘iplicit’s support has been phenomenal’

Not only was implementation carried out double-quick, but the West Dean team found the system intuitive to use. “A lot of the terminology and the way transactions are handled is similar to Exchequer,” says Charlotte.

She is full of praise for iplicit staff. Sam Curtis, iplicit’s Customer Service Director, and Helen Gouldbourne, Implementation and Training Partner and Onboarding Lead, understood the urgency of the situation and gave West Dean a lot of their time.

Charlotte also singled out Tommy Shillibeer, Implementation Technical Support and Sean Kelly, Training Consultant, for praise.

“We probably email the support team once a week with a random query. The support has been phenomenal, from early morning to the evening,” she says.

She said the major difference between iplicit and Exchequer was the flexibility of reporting. “Instead of having to run a report and then manipulate the data in Excel, adding extra columns and so on, I can run the report in the format I choose and see exactly what I need to see,” she says.

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“The Trustees and budget holders can also drill down into specific items, all the way down to the transaction level. In the past, if someone wanted to look at an invoice, they’d have to ask one of the transactions team to physically find it in the filing system and also find the approvals that go with it. Now, you can just click on an item and see its history.

“At the moment, my favourite feature is the ability to see a P&L in your budget. We can load our budget and our half-year forecast and see them clearly against each other. In the past, we’ve had to manipulate data in Excel, but now we can see these things at a glance without having to load a lot of different spreadsheets.”

Implementing a new finance system was a daunting task when done without the time to fully review existing processes. “For an organisation as complex as ours, with 300-plus staff, there are a lot of workflows to put in place, from purchase order approvals to seeing your management accounts,” says Charlotte.

“But things have gone very well, the support team have been very responsive and we’ve had a great experience so far.”

Accounting software for charities and nonprofits

iplicit is empowering nonprofit organisations around the world to take control of their finance operations and focus on what really matters. iplicit can help you upgrade with a number of solutions to support with accounting software for charities

True-cloud accounting software without the sky-high pricing. iplicit is the award-winning accounting solution that pays for itself.

With iplicit's automation tools you can close month end fast and with unlimited reporting dimensions, get critical insights quickly.

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