



Salix Finance Case Study

Not-for-profit loan and grant provider
improve financial efficiencies

Testimonial



“We’re able to produce reports for each fund by region, project, applicant, and phase which key for us and SunSystems allows us to do this with ease”

Indira Ondhia
Financial Controller



Profile

Salix Finance enables public sector organisations across England, Scotland, Wales and Northern Ireland to take a lead in tackling climate change by increasing their energy efficiency. Salix provides 100% interest-free capital for the public sector to reduce their energy costs by enabling the installation of modern, energy efficient technologies and replacing dated, inefficient technologies.

To date, they have funded over 14,400 projects to a value of £460 million – saving the public sector £1.7 billion over the projects’ lifetime and reducing carbon dioxide emissions by over 600,000 tonnes per year.

Background

Prior to installing SunSystems in 2009, Salix Finance had been using Sage, which was struggling to provide the level of reporting and analysis required by internal stakeholders and their government funders.

Indira Ondhia, Financial Controller at Salix, comments “Sage didn’t allow us any flexibility and doesn’t let you drill down into transactions and interrogate the data.”

“Reporting is key for the business – Salix has to facilitate various stakeholder reports and without a robust finance system we wouldn’t be able to deliver these reports.”

Selection Process

The selection process involved a tender process with multiple suppliers invited to respond to the requirements. Indira comments “What stood out about SunSystems was its ease of use, how cost efficient it is and the flexibility to change with the organisation as we evolve.”

The benefits of SunSystems

SunSystems Key Features

There were a number of areas of functionality which Salix were keen to take advantage of as part of the move across from Sage:

Multiple level of analysis were important to Salix with the ability to monitor funding scheme, project, phase, region, applicant, applicant type and the relationship manager. Indira comments "we like the fact we can use so many analysis dimensions and how easy they are to use."

Efficient management and stakeholder reporting – Reporting efficiently across the multiple levels of analysis was critical for Salix, Indira outlines "we're able to produce reports for each fund by region, project, applicant, and phase which is key for us and SunSystems allows end users to put these together without the need for consultancy."

Loan re-payment collections, Indira outlines that they use SunSystems Credit Control to collect loan re-payments "we run a report that allows us to see what we're going to collect over the coming months – we love the functionality it provides us and the ability to maintain a consistent set of notes across the account or transactions irrespective of who is in contact with the customer."

Seamless integration with their self-service client website which allows clients to update their contact and project details which flow through to SunSystems automatically.

One-stop shop with FinanSys Cloud – Salix also utilise FinanSys Cloud to take the hassle away of maintaining their own IT infrastructure, Indira comments "the cloud hosting is really good, we've not had any issues with downtime. It's great that it comes with 4 hour recovery time."

SunSystems with FinanSys

Commenting on the post implementation care, Indira said "the support we receive is responsive – FinanSys is able to resolve 90% of the issues then and there on the phone"

"SunSystems plays a massive role within the organisation, we couldn't function without it."

Why FinanSys is different

- Only UK partner with a sole focus on SunSystems
- 18+ years of experience
- 100+ implementations of SunSystems in 36 countries
- Dedicated public training courses for the SunSystems community
- Highest ratio of support staff to customers within the SunSystems community
- Agile and personal approach to customer service

Get in contact today to discuss how SunSystems could benefit your organisation

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