



Significant improvement in overall efficiency achieved with Advanced Exchequer.

A significant part of Martha Trust's income is from local authorities, but much needed funds also come from donations, legacies, regular giving and much more. Finance Officer Kelly Hutchings talks about how Advanced Exchequer has streamlined the charity.



Martha Trust is a growing charity and over the past few years they have opened more beds and had hydrotherapy pools installed at two of their homes. When it comes to finances, as with any organisation in the charity sector, visibility and effective management reporting is key.

Kelly comments, "Exchequer gives us an overall picture of the charity's finances in an instant. All our incomings and outgoings are processed through Exchequer, which has streamlined our accounting workflow no end. I produce daily reports utilising the Excel integration and have set up a linked spreadsheet to instantly display current spend. This means I always have sight of the overall picture and any changes made in Exchequer are updated on the spreadsheet in 30 seconds."

Martha Trust raises 70 invoices on a monthly basis, all of which are handled directly via Exchequer. Kelly and her team also make regular use of the productivity enhancing tools and shortcuts that she feels really helps speed up business efficiency on a day-to-day basis.

When Martha Trust is embarking on a specific fundraising project, such as the new hydrotherapy pools, the charity often receives funding dedicated to that area. They therefore set up a new cost centre, which means they can keep track of the funding received vs the related outgoings to measure progress and determine costs.

"The level of detail we can provide to management and other relevant parties has improved significantly thanks to Exchequer," Kelly continues. Financial reporting and analysis is the basis of what we do which is why I also attended a course run by Exchequer on effective reporting."

By taking the reporting capabilities of Exchequer to the next level, Kelly opens up no end of possibilities to keep track of general and restricted funds, budget wisely and make sure every penny counts. She is also able to provide the depth of financial detail increasingly required by the industry's regulators.

Client >

Martha Trust

Sector >

Charity

Project >

Streamlining account workflow for effective financial management.

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Kelly Hutchings >
Finance Officer >
Martha Trust

Charity with income around £4 million annually.

Kelly concludes, "We are very happy with Exchequer and have always received good service from the team. Support queries are dealt with very quickly and I make regular use of the online help facility. I would definitely recommend the solution to others, especially those in the charity sector."

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Kelly Hutchings >
Finance Officer >
Martha Trust

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