

MYOB Exo with ExoHosted and Dataline

Client: Capability Resources/EZ Energy

Location: NSW, Australia

Industry: Safety & Compliance



Take MYOB Exo into the cloud with ExoHosted

Capability Resources helps industries achieve a safe and productive workplace by providing quality products and services. The company provides a single point of contact to ensure companies in a range of industries achieve and maintain success in the critical areas of compliance and safety – competent people, safe work practices and fit for purpose equipment. The company is also a provider of turnkey temporary and permanent energy solutions specialising in installations of 5kVA through to multi megawatt installations.

Problem

The problem was two-fold: Hardware and Business Efficiency.

The on-premise server that Capability Resources were using to run MYOB Exo had reached its end-of-life. Beyond the cost of replacing the physical server, the company had big concerns about its disaster recovery capability. It was exposed to the risk of a building disaster in the event of fire or flood, and was having to spend time and resources managing offsite backups of data.

On the efficiency side, invoices were entered into MYOB Exo manually, tying up administrative staff. Tax compliance meant paper invoices were retained and archived for seven years. This was time consuming and expensive and if records did have to be retrieved it was difficult and time consuming to find anything.

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“Dataline streamlines our invoicing processes and reduces administrative paperwork. Over 80% of our purchasing is made after issuing a Purchase Order so once received, the invoices flow automatically into MYOB ExoHosted.”

— Jennifer Conn, Financial Manager

Solution

A cost/benefit analysis showed it was better to move MYOB Exo into a hosted environment than buy a new server. Kilimanjaro’s managed hosted environment gives Capability Resources all the benefits of the cloud with none of the pitfalls.

Dataline streamlines the invoicing processes and reduces administrative paperwork, with invoices flowing automatically into MYOB Exo instead of being manually entered. The Dataline portal digitises the invoice information and does a series of tests across to the MYOB Exo database to match them with a quote or purchase order. Exceptions are routed to the correct person for authorisation.

All financial and invoicing records are kept digitally for easy tax compliance.

“In terms of timing, the move to EXO Hosted and implementation of Dataline coincided with the early appearance of COVID-19 so the ability to work remotely should the need arise in the future was an added benefit.”

— Jennifer Conn, Financial Manager

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Outcome

Kilimanjaro's ExoHosted service saved the cost of a new server but has also brought many other benefits. Capability Resources can confidently recover data if disaster strikes. The company no longer has to manage off site backups or archiving, and Dataline has digitised their invoicing process they no longer have to retain physical documents. Putting MYOB Exo into the cloud also delivers on Capability Resources' accessibility requirements, including extending access to staff working from home. Implementing two new business systems in quick succession was easy and smooth, Jennifer Conn says. "Both partners were responsive and easy to work with," she says. "We're very happy with ExoHosted and Dataline."

"Now we have more accountability, complete traceability and the system is much more robust."

— Jennifer Conn, Financial Manager

| Before | After |
|--|---|
| Time & cost of paper invoice storage/retrieval | Records at fingertips |
| Manual invoice entry | Invoices flow automatically into MYOB Exo |
| Risk of data loss in event of disaster | Data stored and backed up in the cloud |
| Staff must work in the office | Remote work now possible |

Key Benefits

Capability Resources has taken risk and cost out of the business by implementing ExoHosted and Dataline. The ability to access MYOB Exo remotely has de-risked the business by protecting data in the cloud and allowing staff to work remotely as required. Capability Resources has refined its business workflows, with automation enabling the business to run more smoothly and efficiently. Dataline has streamlined and automated creditor invoice processes, freeing up administrative staff and removing bulky filing cabinets from offices. Invoices flow automatically into MYOB Exo instead of having to be manually entered. The business has complete traceability with financial and invoicing records kept digitally for easy tax compliance.

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