

Toowoomba Catholic Schools Office and Business Central

Business Central has transformed financial operations for Toowoomba Catholic Schools Office with streamlined processes and strengthened oversight, empowering schools across the Diocese.



Organisation
Diocese of Toowoomba Catholic Schools
Industry
 Education
PA Product
 Microsoft Dynamics 365 Business Central

KEY POINTS

- Toowoomba Catholic Schools Office (TCSO) provides centralised support, leadership, and services to 32 schools in Queensland.
- TCSO identified a need to consolidate their financial systems and move to the cloud.
- Business Central aligned with their needs, as did their two-decade long partnership with Professional Advantage.
- Business Central, customised and supported by PA, has streamlined financial processes, enhanced internal controls, and received overwhelmingly positive feedback.
- TCSO are consistently ready for further progress and look forward to future enhancements from Microsoft and PA.

"We deeply value our relationship with PA and the people we work with. It is a collaborative, friendly, professional partnership where we feel truly heard."

Julie Payne, previous Director of Finance, Infrastructure, and Information, Toowoomba Catholic Schools Office.

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The Organisation:

Toowoomba Catholic Schools Office (TCSO) serves the 32 Catholic schools and colleges that form the Diocese of Toowoomba Catholic Schools spreading across Darling Downs and South-Western Queensland, providing education from primary through to Year 12. TCSO, based in Toowoomba, is the central office to the schools with approximately 120 employees. They house divisions such as human resources, payroll, compliance, as well as maintaining an oversight of the schools from education to core support. They also provide leadership development, mentoring, coaching, and support to the schools and their staff.

TCSO has been a client of Professional Advantage (PA) since 2005 with their partnership beginning when TCSO were using Microsoft Dynamics GP as their financial system.

The Need:

TCSO recognised a need to update and consolidate their financial systems. At the time they were using Dynamics GP and whilst this solution was effectively meeting their needs, the office and the schools were operating different finance models leading to a disjointed system. Seeking a more cohesive solution that aligned with their focus on being cloud-based, TCSO began exploring alternative systems, conducting extensive market research, visiting peer organisations, and performing due diligence.

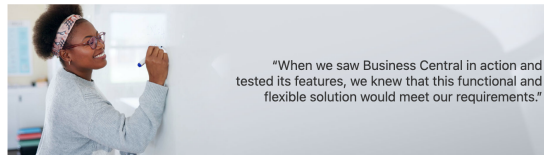
Their research led them to select Microsoft Dynamics 365 Business Central as their new financial system. From there they engaged with various providers but found that PA aligned the best with their timing and requirements.

"We were highly satisfied with the relationship we had with PA and the great service we received, so were very pleased to continue our relationship with PA with Business Central."

Julie Payne, previous Director of Finance, Infrastructure, and Information, Toowoomba Catholic Schools Office.

The Solution:

Business Central perfectly aligned with TCSO's requirements, particularly their focus on transitioning to a cloud-based system. The platform offered ease of use, accommodating varying levels of expertise among staff and allowed for customised access levels tailored to different employee roles.



"When we saw Business Central in action and tested its features, we knew that this functional and flexible solution would meet our requirements."

The Results:

During the implementation and TCSO's continued use of Business Central, PA have facilitated expert modifications of the solution to align with the organisational requirements, working styles, and training preferences of TCSO.

"The team at PA were amazing. They were the perfect match to our organisation."

The teams from both organisations had a highly collaborative approach that kept the focus on improving and enhancing processes. This continued approach and relationship also means that TCSO have the confidence to reach out to PA whenever they need enhancements or adjustments, knowing PA will consistently deliver.

Business Central integrates perfectly with TCSO's student information system allowing for the efficient management of debtors and the generation of student fee amounts.

"This integration is crucial in ensuring that all financial data is consolidated within Business Central, allowing schools to handle their financial administration seamlessly."

Previously reliant on paper-based approvals and manual authorisations, TCSO has transitioned their processes to online with Business Central, a shift that has significantly streamlined their processes including:

- Immediate access to invoices from any location.
- Online approvals, with tracking of the invoice journey.
- Facilitation of internal controls.
- Visibility over everything, in one system.
- Ability to pinpoint delays.
- Removal of the need to store documents.
- Elimination of the need to transport documents between schools and the office.
- Streamlined auditing.

Audits, which once required extensive physical documentation and space, are now conducted electronically, saving both time and money.

"Our audit process has been transformed. There was great celebration the first year that we didn't have to manage the transportation of documents and facilitate the audit team and all the relevant documentation."

In order to improve their collections management, PA recommended their own Collect 365 enhancement, an add-on that streamlines and automates debt collections.

"This module has proven vital in managing debtors, which is critical for the financial health of the schools."

TCSO has identified the cashflow benefits of using Collect 365 and the PA support provided, but have also, as an end user, been able to bring their experience of the module to the developers.

"Our feedback for Collect 365 has been used in the development of the module. Knowing that we are respected and listened to by PA is very much appreciated."

The Release Management program provided by PA has been a vital support mechanism.

"We know that if something is not right during the update process, the dedicated release management team are there to promptly address issues and offer support."

PA specific support expands beyond Release Management with services such as their Business Central newsletter and the incredibly popular *Professional Advantage Community for Business Central Users*.

"The community gives real-life information about Business Central that you don't always get in training. It is key in sharing practices and learning from others."



The ease of use of Business Central has meant that the solution is utilised across the organisation and schools. Whilst the core financial processes are actioned by the same number of users as with Dynamics GP, the overall number of users has increased to approximately 90, reflecting the system's broad utility across different levels and access needs.

This user-friendly nature is just one factor in the response from the TCSO team and the schools being overwhelmingly positive. The commitment to training and the system's ability to meet the school's needs have reinforced their satisfaction.

The Future:

Business Central is recognised with TCSO as transforming their processes and oversight. But they also identify that there are still things to do.

"We know Microsoft are constantly working on and improving Business Central, and we welcome the enhancements to our systems that we know will come in the future."