

Customer success story
Forest Peoples Programme

Industry

Not-for-profit



Location

United Kingdom

Greentree product suite

System Manager

Screen Customisation
Manager

Accounts Payable

General Ledger
with Reconciliations and
Advanced Security

Cash Management and
Bank Reconciliations

Foreign Currency

GREENTREE FINDS THE WAY THROUGH THE FOREST

CHALLENGE Forest Peoples needed to modernise its accounting system, to allow double-entry bookkeeping and create a proper audit trail.

SOLUTION Greentree's finance module, coupled with the F.R.E.E. Financial Reporting Excel Engine, streamlines data entry and enables drill-down analysis.

RESULTS Details of staff expenses, salaries and complex multi-funded projects are clearly visible, bringing big gains in efficiency.



"We are using the system
more effectively each year"

"We had completely outgrown our previous accounting system, so Greentree really came at the right time."

Sarah Roberts is the Institutional Finance Manager for Forest Peoples Programme (FPP) which is a not-for-profit organisation that supports and advocates for the rights of forest-dwelling communities, especially in countries where their environment and livelihoods are under threat from encroaching development. Its focus, in the beginning, came from the expertise and relationships that the small founding team had with specific communities, primarily in the Guyanas and in South and South East Asia.

"FPP has grown into a respected and successful organisation that now operates right around the tropical forest belt where it serves to bridge the gap between policy makers and forest peoples," Sarah explains. "Through advocacy, practical projects and capacity building, FPP supports forest peoples to deal directly with

the outside powers, regionally, nationally, and internationally that shape their lives and futures."

Creaking system no longer coping

A valuable lesson learned by NFP's in recent years is that their goals are easier to achieve if their organisation is on a sound business footing. FPP's financial management system, Moneysoft's Money Manager, was no longer fit for purpose.

"Once we started to grow as an organisation and subsequently as a finance team, we realised the shortcomings of Money Manager," Sarah recalls. "It is a cash book based system, so there was no double entry book keeping capability. There was also a lack of audit trail – it was easy to delete transactions, without there being a record of who had done what."



A community awareness-raising workshop on the cash and non-cash value of customary lands. River, Cess, Liberia. Credit: Poppy Kohner/FPP

"It is a single user system. Even if we put the software onto a shared drive, only one person could access it at a time – this was just not practical any longer. We were unable to monitor accounts payable, leading to occasions where we would pay invoices twice. We had outgrown it."

ERP was the answer, and FPP discovered Greentree, implemented by Prerogative.

"We needed proper ledger accounting – a nominal ledger, accounts payable and cash books," Sarah says. "We needed multi-user access and foreign exchange capability. We also wanted to be able to report in different currencies."

FPP wanted to be able to report in different ways, without requiring another day's consultancy and bespoke report writing. It also wanted to be able to pull off expenditure reports for each grant that it was holding, and subdivide that expenditure into different budget lines.

Flexible and cost-effective

Cost was a constraining factor, and FPP also assessed SAGE and ACCESS before settling on Greentree.

"The Greentree presentation was excellent," says Sarah "We had sent a sample report to each provider and the Greentree presentation really understood what we wanted and showed us how Greentree with the FREE reporting would work. We really liked the Prerogative sales team. The SAGE people really didn't understand our needs and the ACCESS system was too expensive."

FPP appreciated the flexibility of Greentree, which allowed it to select the modules it wanted. The tree structure with its drill-down capability also impressed, along with being able to add more users easily to the system.

"It was a completely new way of working for us, so the initial learning curve was quite steep," Sarah

"The analysis (tree) reporting is excellent, now that we are used to generating explorer searches. The cash management system is also extremely robust. The audit trail is an improvement and yet there is still sufficient flexibility with the system."

says. "It took Prerogative time to learn how our income stream worked but since then they have been extremely helpful when looking at importing data into our banking system and sorting out other queries."

A great gain in confidence

"We are using the system more effectively each year," says Sarah. "We allow all finance staff the same access – it is the most efficient use of the system and our time. We all get a great deal out of the system for both organisational processing and grant reporting and we also have confidence in the year-end processes."

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The ability to pull off accurate, up-to-date reports on expenditure codes and grants has helped Sarah's job hugely. She now has great confidence in the reports that are pulled off in terms of completeness. One of the biggest benefits is being able to process journals in Excel and then upload them.



Forest Peoples Programme (FPP) was founded in 1990 in response to the forest crisis, specifically to support indigenous forest peoples' struggles to defend their lands and livelihoods. It works to create political space for forest peoples to secure their rights, control their lands and decide their own futures.
www.forestpeoples.org

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"We knew we needed a better finance system and were really quite desperate for it," Sarah concludes. "Without it, we would have become completely unstuck in terms of reporting on the large government-funded grants."