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CRG Cost Allocator Helps United Way New York Complete Advanced Cost Allocations with Ease, Accuracy and Speed

“Cost Allocator is a nifty add-on that accomplishes an important set of repetitive, tedious tasks!”

Ira Bellach, Vice President & CIO
United Way of New York City

About United Way of New York City

United Way of New York City connects people, resources and ideas to create a thriving community characterized by income stability, educational success, and healthy people. United Way of New York City believes that everyone has a role in building a better future for all. The organization inspires bold goals, brings together broad coalitions, and makes game-changing choices to accelerate progress.

United Way of New York City believes that results matter and that for a city as unique as New York, results come from:

Insight: Documenting critical human care priorities, involving the right partners, and organizing effective community responses.

Understanding: That to solve problems requires understanding their root causes not just the symptoms, and that complexity necessitates surrounding a problem from all angles.

Courage: To helpv those most in need in our community, and to be specific, measurable, and trackable in everything we do.

For more Information about United Way of New York City, visit **www.unitedwaynyc.org**.

Overview

United Way of New York City, a nonprofit organization, implemented Microsoft Dynamics® GP to meet their business management requirements. In addition to an enterprise resource planning system, the organization needed an advanced costing solution that would provide them with the ability to perform multi-level cost allocations, and seamlessly send journal entries for the allocated costs to Microsoft Dynamics GP as un-posted batches and/or budgets.

Cost Allocator from Corporate Renaissance Group (CRG) gives the United Way of New York City the ability to perform multi-level cost allocations.

Situation

United Way of New York City is a volunteer-led organization that mobilizes the resources and strategic thinking of the nonprofit, private, and public sectors to improve lives, strengthen the community, and build a stronger New York City.

After implementing Microsoft Dynamics GP, United Way of New York City determined that they required greater costing functionality. Specifically they needed a costing solution that would:

- ▶ Allocate shared costs to both support and functional departments;
- ▶ Allocate the total costs (i.e. the direct costs plus the allocated shared costs) from the support and functional departments to cost allocation departments; and,
- ▶ Allocate the total costs from the cost allocation departments to the appropriate departments and programs.

Additionally, the United Way of New York City needed to accrue revenues to specific programs based on the balances of other accounts. These allocations needed to be completed on both a monthly and an as-needed basis. The allocated costs needed to be sent seamlessly to Microsoft Dynamics GP as batches (for review before posting) or Budget IDs. The cost driver data and the allocation percentages that were to be used to allocate costs were saved in Microsoft Excel and other structured data sources.

Solution provided by:



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Solution

Performing advanced, multi-level cost allocations was a key business requirement for the United Way of New York City; consequently, they investigated a number of options for satisfying their costing needs. With the help of Cole Systems, the United Way of New York City's Microsoft Dynamics GP partner chose CRG Cost Allocator. Cost Allocator provided the necessary functionality that met and actually surpassed their costing requirements.

The CRG Team:

- ▶ reviewed United Way of New York City's costing needs
- ▶ provided general training to the Accounting and IT teams
- ▶ finalized the implementation with the United Way's IT Team.

CRG Cost Allocator's ability to perform unlimited multi-level cost allocations was used to satisfy the requirement for the allocation of shared costs to functional and support departments before allocating the total costs to the particular program or department.

Cost Allocator can perform advanced profitability analysis by segments, making it easy for the United Way of New York City to address its needs for revenue accrual to programs. The ability to import data from Microsoft Excel and other data sources made it easy to bring the cost driver data from Microsoft Excel for use in the allocations. With its full integration to Microsoft Dynamics GP, Cost Allocator automatically creates either an un-posted batch or budget in Microsoft Dynamics GP. The "trace and track" report in Cost Allocator provides a complete audit trail for every aspect of cost allocation.

"The CRG technical team was very professional and responsive, they knew their stuff — it was a professional pleasure working with them."

Ira Bellach, Vice President & CIO
United Way of New York City

Benefits

Simplified cost allocation process

The cost allocation process is simple and has been reduced to a finite number of steps that can be run monthly, weekly or even daily:

- ▶ import the data from Microsoft Dynamics GP
- ▶ copy the allocation driver data and percentages from the previous period to the current period
- ▶ adjust the allocation percentages as required
- ▶ click a button to perform the allocations.

Easy access to cost allocation information

All the information is stored in the Cost Allocator database. Employees have easy access to current and historical costing information; additionally, the information is available for reporting in a number of formats.

Centralized cost allocation logic

As Cost Allocator is a supported software solution, Envision does not have to worry about the expense or lost time associated with problems or future upgrades. As a nonprofit with limited funds, knowing what the annual operating costs will be makes Cost Allocator a more attractive solution.

Easy to learn and use

Employees in the Accounting Department were able to complete complex allocations with Cost Allocator after receiving training. Cost Allocator is simple to use.

The right solution from the right partner.

CRG Cost Allocator allows the United Way of New York City to easily perform multi-level cost allocations and accrue revenues to specific programs.

About Corporate Renaissance Group

Since 1989, Corporate Renaissance Group has been a global provider of innovative solutions that improve business management and performance. With over 4,000 customers worldwide, CRGroup has established itself with expertise in business management applications. CRGroup delivers solutions by leveraging their expertise in Microsoft Dynamics, SharePoint, business intelligence, financial and costing principles, shared services and employee performance management.

CRGroup is a part of the Microsoft Partner Network, headquartered in Ottawa, Canada, with offices throughout Canada, South Africa, India and the United States.



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For more information about CRG please visit www.crgroup.com.