



Microsoft® Dynamics NAV
Focus on...Gilman School

Case Study

Scenario

Gilman School is an independent school located in Baltimore, Maryland that educates a diverse community of 983 boys in grades pre-first through 12. Gilman has three school divisions: Lower School, grades pre-first through five; Middle School, grades six through eight; and Upper School, grades nine through 12.

Gilman's Accounting Manager, Becky Levy began searching for a replacement for their legacy financial management software in early 2002. They had been on their system for seven years and needed software that met today's technology standards. Becky called several peer schools in the community and found that a few software products dominated the market, but that the users were unsatisfied with the status quo performance. AVF Consulting, a Microsoft Certified Gold partner, introduced Gilman to Microsoft Dynamics NAV.

"We were impressed as soon as we saw [Microsoft Dynamics NAV]. The interface is extremely user friendly and we love the ability to drill down into layers of data," said Becky Levy, Accounting Manager of Gilman School. "Microsoft Dynamics NAV was exactly what we needed right out of the box. With AVF's ability to make a few minor modifications, including the addition of student billing functionality, we have an exemplary system that has already saved us money."

Their selection criteria included:

- General Ledger, P.O.s, Receivables
- Fund accounting
- Student billing
- Point-of-sale integration with the back-office accounting
- Ability to cut and paste into Microsoft Excel
- Ability to design and write reports as needed
- Budgeting: Cost center/departmental budgeting
- Easy reporting tools
- A trustworthy, responsive and experienced partner
- A proven product backed by a technology leader with a best practices model for business financials

"The biggest selling point for us was the completely integrated system," says Sean Furlong, Director of Finance for Gilman. "Microsoft Dynamics NAV gave us everything we need to run our entire school, from back office accounting and student billing to the integrated point-of-sale for our bookstore."

"I had a strong feeling of trust in AVF throughout the entire implementation process, and I always felt confident that AVF would support us and meet the project deadlines. And they did."

*Becky Levy, Accounting Manager
Gilman School*

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Benefits

The Gilman School cites specific areas where Microsoft Dynamics NAV has increased the efficiency and productivity of their staff:

- **Money and time savings with faster reporting.** Reporting is so much simpler now that Gilman has the ability to drill down, develop custom reports on the fly, and run reports directly from the system. Income statements that used to take up to half a day to produce using Microsoft Excel can now be produced directly from Microsoft Dynamics NAV within one hour. Jet Reports allows Gilman to write their own reports and is very useful for quickly producing student bills and collection letters. Downloading the trial balance now takes half the time it did on their old system. They can also generate custom reports to suit auditor requirements, which saves thousands of dollars in auditor expenses.

Gilman also enjoys the ease and convenience that Microsoft Dynamics NAV provides in pulling such necessary reports as: financial aid reports for the IRS; account schedules and activity reports for division heads; GL activity for the entire year; student customer reports; batch enrollment contracts to see who was enrolled on what day; receivables for producing collection letters; sales tax reports to reconcile sales tax from the bookstore; and cash grants that students receive.

- **Staff efficiencies.** Microsoft Dynamics NAV has created so many efficiencies that Gilman has been able to reallocate responsibilities in their finance department. Now that they no longer need two people to do GL and AP, they've eliminated an accounting position and replaced it with a much needed Human Resources position. Becky Levy, the accounting manager, has been able to take on more of a finance role and focus on budgeting, managing investments, and assisting with operational issues like Gilman's \$30 million building renovation.
- **Greatly improved student enrollment process.** Thanks to the integrated Student Billing system that AVF created for Gilman, their student enrollment process significantly improved in the first year. Because the system is so easy to use and integrated with Microsoft Dynamics NAV, the staff only enters data once. The data can instantly be exported to Gilman's student database and used by their Director of Admissions. Student enrollment and book invoices can be combined, and the Bank Reconciliation module has helped to reduce errors by 30%.
- **Integration.** Microsoft Dynamics NAV's superior technology allowed AVF to create a suite of customized applications to suit several of Gilman's needs including student billing and retail point of sale to manage their bookstore. Student billing is connected to the GL, allowing for quick access to student data. Bookstore processing is integrated and can be seen instantly, saving Gilman at least four days a month in administrative work. Entering P.O.'s has become a super fast process and student enrollment is now a smooth exercise that can be completed on time.

About AVF Consulting

AVF Consulting is a full service, Microsoft Gold Certified partner providing ERP, financial management applications and IT solutions. As one of the Mid-Atlantic's leading information technology firms, AVF Consulting has been a reseller of Microsoft Dynamics NAV since 1996. AVF's hands-on approach ensures that every engagement receives the highest level of customer service and that each customer receives the individual attention they deserve. Learn more about us at www.avfconsulting.com.