



TES

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Martlets



Martlets Hospice

case

Martlets is a charity providing essential services to local people affected by terminal illness.

Their expert teams help people do the things they love with the time they have. Since Martlets' inception in 1997, more than 25,000 people have been supported and cared for.

TES has developed close partnerships with charities and NFP organisations. At TES, we offer access to digital solutions that make game-changing differences to process and analytics, and provide a crucial return on investment. For hospices like Martlets, digital transformation will unlock the time, the efficiencies, and the processes they need to implement to have an even greater impact on community care.

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## The challenge

Martlets had come to the realisation that their finance solution needed to be modernised, and therefore embarking on a digital transformation journey would free the finance team of the restrictions and frustrations that outdated systems were generating; Martlets was on a dated version of Sage at the time.

Using their incumbent solution was causing unnecessary delay in processing data with manual input one line at a time, alongside paper-based invoicing that was not efficient enough for the large organisation they had become. Simply, Martlets had evolved but the finance solution and their processes hadn't yet caught up.

Before initiating conversations with TES, Martlets had started its research into solutions that may alleviate their immediate problems. Upgrading to the latest version of Sage and looking deeper into different document capture solutions were all considered but there was no trust that those solutions, or a combination of solutions would be at all future-proof. The goal was to find a solution that could act as a single application and one version of the truth – a solution for all needs, giving the hospice confidence that it would stand the test of time and evolve with them.

Martlets was excited by the Software as a Service (SaaS) model that Microsoft Dynamics 365 Business Central provides. Automatic updates would ensure their system never outdated again. Once all key Martlets personnel were on board with Business Central as their solution of choice, the next stage was to search for the right implementation partner. Part of the process was to tender for the project with demonstrations from potential partners – one of which was TES. Through this tendering process, intuition, price-point consideration and chemistry between both organisations was paramount, and the choice was TES.

Martlets was then keen to understand the solution's potential in more detail and the processes by which it can be tailored and deployed.

*Pictured:*  
**Hicham Issa**, Consultant  
**Jon Gill**, Support Consultant



## The solution and benefits

The theme of solution updates – automatically or by request is consistent in this story. Martlets had found a solution in Microsoft Dynamics 365 Business Central that delivered. With TES' guiding hand, and even direct communication with Microsoft, Martlets benefits from consistent evolution brought about by changing needs.

Many requests raised by Martlets were already existing within the software, highlighting its depth, but Martlets' Finance team also had the experience of direct communication from Microsoft after submitting feedback and being active on forums. From their point-of-view, if Microsoft are asking what users need and acting on those needs, it instils further confidence that Business Central will always be able to adapt and evolve:

**I like that a user can be involved and steer the platform's evolution. One email of feedback and Microsoft were in touch directly. You feel heard.**

Finance Assistant, Martlets

Business Central also offered a more unified system to manage finance compared to the Sage solution with paper-based invoicing and manual data entry that had been causing pain across the organisation:

"We were going around the houses to pull information together before, and there have been instances where I have had to go back into Sage to export old information on request... the load times are frustrating and the whole process is inefficient. Business Central has removed that pain entirely."

Speed was key for Martlets and the time saving aspect after their Business Central implementation was an immediate benefit. Furthermore, Business Central gives the hospice more control over naming conventions for nominal codes, which had increased in amount over time and with Sage; these couldn't be edited or maintained in any precise way. Using Dimensions, TES set Martlets up with multiple tailored connections, tagging different data points to keep better track of important activity such as the management of funds. This more considered set-up also unlocks better reporting functionality.

The extra granularity, especially for unrestricted and restricted funds has really helped in reporting on exactly the metrics that different departments need to action on. Martlets now has the ability to tag VAT rates on each and every transaction in Business Central in line with their exemption policy, and allows them to finally submit directly to HMRC via Making Tax Digital. When pulling reports from Business Central, it displays what is fully recoverable and what's not. Before Business Central, Martlets were extracting every transaction and manually tagging each one in excel.

"As you can imagine, tagging transactions at the stage of input quickly becomes an intuitive part of the process and then the organisation benefits from being able to report on those entries quickly. Compared to pulling a report with 50,000 lines and tagging them individually, Business Central is saving vast amounts of time, not to mention minimising the risk of manual error."

There were also benefits in the functionality of Business Central that appealed to Martlets because of their status as a hospice. Document capture being a significant one.

"We used to be surrounded by lever arch files. If someone wanted to see an invoice from three months ago, it was incredibly difficult to pull them out, and then you have to refile everything after every payment run. You're sending invoices for approval in plastic envelopes with a stack of invoices and people are manually signing them. That can't be the way we operate as a modern organisation."

Continia Document Capture is an end-to-end solution to import, register, approve and archive complete purchase invoices and credit memos directly into Business Central. With help from TES to set up the functionality, Document Capture integration means everything is now done electronically. Making the process digital has saved Martlets weeks at a time coding invoices.

**80% of my job when I started at Martlets was coding invoices and now it's half an hour a day to keep on top of them. It remembers what you've taught it so it can create invoices for you. It's a huge improvement.**

Business Central has freed up significant amounts of time and unlocked the opportunity for the Martlets finance team to be self-sufficient, organised, and free to focus on the most important day-to-day activities.

*Pictured:*  
**Gurpal Bagdi**, Managed Service Developer  
**Kashif Ali**, Support Consultant



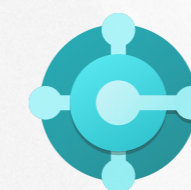
## The future

Feeling comfortable with the fact that Business Central can accommodate the hospice's evolving needs, Martlets has been in regular communication with TES on how to unlock the platform's full potential. One way to do that and one which is firmly on Martlet's radar is the TES NFP pack.

The TES NFP pack is built specifically for organisations like Martlets that want to open-up the solution to more sector-specific requirements such as wider network integration, and management of activities such as charity VAT, vendor bank account security, and gift aid submissions.

Furthermore, and in a similar fashion, TES is implementing Microsoft Dynamics 365 CRM solutions tailored to the needs of organisations such as Martlets, with more sector-specific functionality. By using CRM to capture and build insights on any important relationship, charity and NFP organisations are using the TES Charity applications for CRM to manage fundraising, volunteer, and membership activity, as well as unlocking apps for digital engagement, event management and sales and subscriptions.

The relationship between Martlets and TES is another great tale of collaboration between an organisation making a critical impact on society, and another using digital technology to help enhance that cause.



## Microsoft Dynamics 365 Business Central

The heart of Microsoft Dynamics 365 Business Central is its capabilities to manage finance. The solution is agile enough to change configuration based on your specific requirements and give you a true picture of your finances, and one version of the truth.

Get the lowdown on Business Central at:  
[totalenterprisesolutions.co.uk/solutions/microsoft-dynamics-365-business-central/](https://totalenterprisesolutions.co.uk/solutions/microsoft-dynamics-365-business-central/)

# TES will get you there.

Imagine how good you would be at something if you'd done it every day for over 15 years!

TES has developed an extensive understanding of the pains commonly associated with the processes and systems adopted by charity and NFP organisations. Long-standing deployment within the sector gives TES a leading edge as a UK Microsoft partner.

The passion for helping means TES is always on the lookout for ways to improve its own processes so that sector-specific needs can be fulfilled. To quantify this desire for continuous improvement, TES undertakes regular CSAT (Customer Satisfaction) and NPS (Net Promoter Score) surveys.



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