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Sage Pastel Evolutions' security & control provide peace of mind for MTA Insurance

Company Name: Medical Sales & Service

Solution: Sage Pastel Evolution

Industry: Sales/Retail

The Company

MTA Insurance Limited (MTAI) is an unlisted public company and the holder of an Australian Financial Services Licence. Over the last 20 years MTAI has grown to become one of the three largest and most respected organisations in retail motor insurance products and has over 100,000 policy holders.

MTAI's client base includes a number of the most prominent providers of motor vehicles in Australia. As a part of their ongoing commitment to the Australian Motor Vehicle market MTAI supports a number of Strategic partners with specifically branded insurance products.

Servicing every state and territory of Australia, MTAI's head office is located at Woolloongabba in Brisbane.

MTA Insurance

The Challenge

MTA Insurance had been using an entry-level accounting solution that did not provide a level of security over the businesses data. Chief Financial Officer Lyn Hailwood said *'Data was open to changes after reporting which wasn't good for control'*.

MTAI has a number of staff on the road meeting with providers. The current solution was unable to provide detailed information on motor vehicle, entertainment and travel expenses.

With a complicated Accounts Payable structure, it was important that the new solution have the ability to include multiple payment groups such as claims, payment schedules, policy numbers and different payment structures.

MTAI were in need of a solution that could support their complex business structure.

MTA Insurance continued ...



The Solution

Sage Pastel Evolution was implemented into MTAI. Utilising the latest technologies, MS-SQL[®] allows the business to support an unlimited number of concurrent users on the system. Additionally, data integrity is ensured through the use of SQL's transaction rollback feature.

Business Intelligence Centre makes reporting easy

Lyn Hailwood required a solution that would have the ability to provide detailed reporting on all areas of the business. At any time, Lyn needed to know the current claims, underwriting activity, staff costs, salaries and the financial performance of the business.

Business Partner, Progressive Business Technologies developed a Statement of Financial Accounts and Underwriting Summary report for using the Business Intelligence Centre (BIC) module which is an Excel based reporting tool that is part of the Evolution suite. The BIC module adds another dimension to the standard reports that come with Evolution. These reports can be saved and manipulated using all of the standard Microsoft[®] Excel functions.

Advanced Security provides MTA Insurance piece of mind

It's important to MTAI that the new solution provide various levels of security to ensure data integrity. Sage Pastel Evolution allows the business to establish controls for each user and in addition, establish user groups and assign users to groups.

The Solution continued

Each group has a certain level of access capabilities and restrictions. This stream lines the control process and provides comfort to management that data is maintained in a secure environment.

The Results

Sage Pastel Evolution has provided MTAI with deeper insight into MTAI's financial situation enabling them to make quicker, better business decisions.

'Reporting is quick and easy, I select the report and let it run and out comes information that we can use to make business decisions that have a positive effect on the businesses performance.'

Lyn announced.

Testimonial

'It's accurate, saves time and the reports look fantastic'. Lyn Hailwood, Chief Financial Officer for MTA Insurance

visit www.pbt.net.au to view other customer stories.