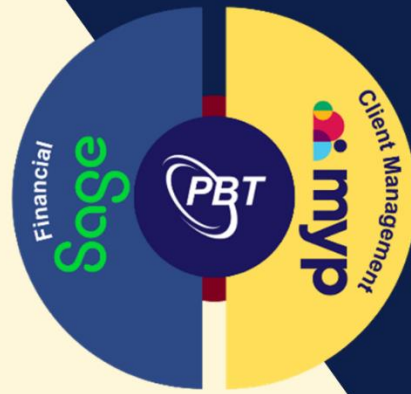


## CASE STUDY

# My Horizons Sage Intacct & MYP Integration

My Horizons Journey to Enhanced Operational Efficiency and Client Care



## Integrating Solutions for Improved Disability Services

My Horizons, a leading not-for-profit disability services organisation in Queensland, embarked on a strategic project aimed at enhancing its operational efficiency. The project centred around integrating MYP, a leading client management solution, with Sage Intacct, a premier Finance & ERP solution for NDIS organisations. The integration, facilitated by the expertise of PBT, focused on automating the syncing of invoice information and client data to streamline financial and client management processes.

## Elevating Service Delivery

My Horizons prioritised enhancing the client experience by leveraging technology to streamline administrative tasks associated with the services provided. With a client-centric approach, their primary objective was to utilise technology to positively impact the experiences of over 2,000 individuals each year. By optimising operational efficiency, their aim was to free up more time to be dedicated to client services, ultimately elevating the overall quality of client experiences and outcomes. The integration of technology was envisioned as a tangible way to make a meaningful difference in the lives of those they serve, going beyond the improvement of back-end processes.

## A Partnership Based on Expertise and Trust

In seeking a partner for this integration, My Horizons chose PBT based on their proven expertise in financial system solutions for the NDIS sector and their commitment to understanding and addressing the unique needs of My Horizons.

With a shared commitment to innovation and success, characterised by the collaboration between My Horizons and PBT, My Horizons achieved a smooth transition and implementation of the new systems.



## Project Outcomes: **Beyond Efficiency**

The integration successfully met its objectives, leading to significant improvements in operational efficiency, data accuracy, and financial management within My Horizons.

Specific benefits include:

- One source of truth for Client Data with automated syncing of new and updated client data between systems
- Automated invoice syncing into Sage Intacct from MYP, reducing manual errors and saving substantial time
- Improved financial reporting accuracy and timeliness
- Increased operational efficiency and scalability

*"The integration of MYP and Sage Intacct has led to a remarkable increase in operational efficiency for My Horizons, minimising time and resources previously dedicated to manual data entry and reconciliation processes."*

**Theresa Harrison Chief Financial Officer - My Horizons**

## Planning for the Future

The solution has laid a scalable foundation for future growth, enabling the organisation to grow and adapt to changing needs and expand its services. Extending beyond operational metrics, enhancing organisational culture, increasing productivity, and improving client satisfaction by allowing staff to focus more on strategic initiatives and client care.

## Successfully Integrate your solutions with PBT

Smart integration.  
Trusted partnership.  
Real impact.

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